RightCapital

Client Transition Guide

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LEGACY WEALTH PARTNERS
www.YourLegacyOurFocus.com

Accessing RightCapital for Financial Planning with Legacy Wealth Partners

Legacy Wealth Partners is transitioning to LPL Financial. This page explains what that means for **RightCapital**, the online portal where you view your financial plan, goals, and linked accounts. The short answer: **your access continues and your plan stays the same**.

1 WHAT STAYS THE SAME:

- **Your login.** Keep using the same username and password, through the **RightCapital Login** button on our website (see Steps 1 and 2).
- **Your plan.** Your goals, projections, and uploaded documents remain in place. There is nothing to re-enter.
- **Your team.** You will continue working with the same Legacy Wealth Partners advisors.

2 WHAT CHANGES:

- **Account data.** Once your new LPL accounts are open, they will appear in RightCapital automatically.
- **Old accounts.** Accounts at your previous custodian will stop updating on **11/13/2026**.
- **A short gap.** It can take until **11/20/2026** for RightCapital to properly display your new LPL account balances.

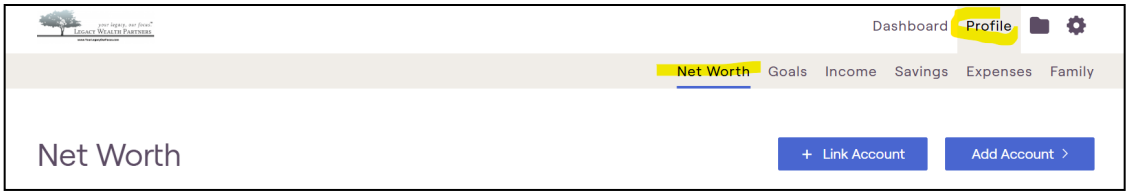
3 WHAT YOU NEED TO DO:

Step 1: Go to the Existing Client page on Legacy's website.

Step 2: Click on the **RightCapital Login** button.

- Use your existing login credentials to login, or email Support@YourLWP.com if you need help remembering your Username.
- After entering in your email, you can click on **Forgot your password?** if you need to do a password reset.

Step 3: Once logged in, navigate to the **Net Worth** tab by clicking on the **Profile** tab, and then clicking on the **Net Worth** tab (see picture below).



Step 4: To re-establish linking your outside bank, investment (e.g. 401k), and loan accounts, click on the **+ Link Account** button (see picture) and repeat this for each institution you need to re-link.



Questions? Contact your Legacy Wealth Partners Team at **(734) 436-8150** or email us at Support@YourLWP.com

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