


Step 1

Navigate to the Profile > Net Worth tab of your plan, and open the Connections menu.

Step 2

Check to see if the connection transitioning to Open Banking is experiencing an Open banking error. It will be marked by a red question mark icon , and will display the message shown below when clicked.

Do you see this error message?

We could not update your account because your consent is required to access the account information through Open Banking. Please provide the consent to access the account information now.

Cancel

Fix Connection

If yes...

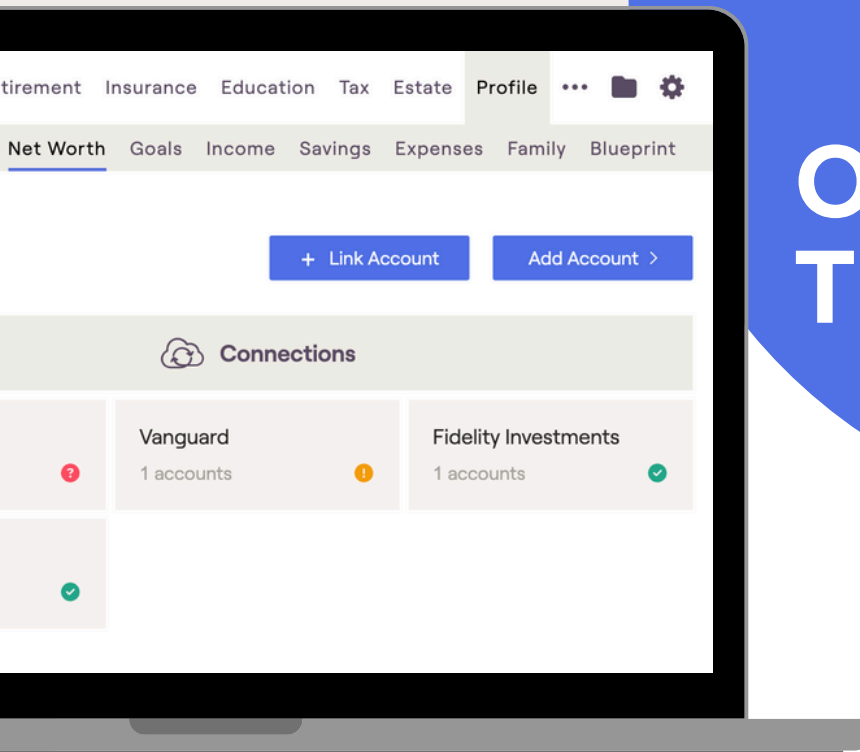
Click “Fix Connection”, and follow the steps listed on your screen. This typically involves re-entering your credentials, and accepting a user agreement or terms of service. This process will securely redirect you to the financial institution’s website.

After you complete these steps, you will be redirected back to RightCapital. The connection with the institution will be re-established, and your accounts will refresh automatically.

If no...

If your accounts have stopped updating but you do not see the above error message for the institution transitioning to Open Banking, please see Page 2 of this document for further instructions.

Open Banking Transition Guide



If you did not see the Open Banking error message displayed on Page 1, please follow the steps below to transition your accounts.

Step 1

Within the Profile > Net Worth tab of your plan, and click on the Link Account button at the top of the page.

Step 2

Within the window that appears, type in the name of the financial institution and click on that link option (it should be marked with a green ✓ check icon).

Step 3



Click the 'Manage Accounts' hyperlink listed under your existing login, and follow the steps listed on your screen. This typically involves re-entering your credentials, and accepting a user agreement or terms of service. This process will securely redirect you to the financial institution's website.

CHASE 

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Attention! This institution has already been connected. accounts listed, please click "Manage accounts".

Review Existing Logins

^ Login 1, 19 January 2023
Checking 
Savings 
[Manage accounts](#)

Step 4

With these steps complete, you will be redirected back to RightCapital. The connection with the institution will be re-established, and your accounts will refresh automatically.