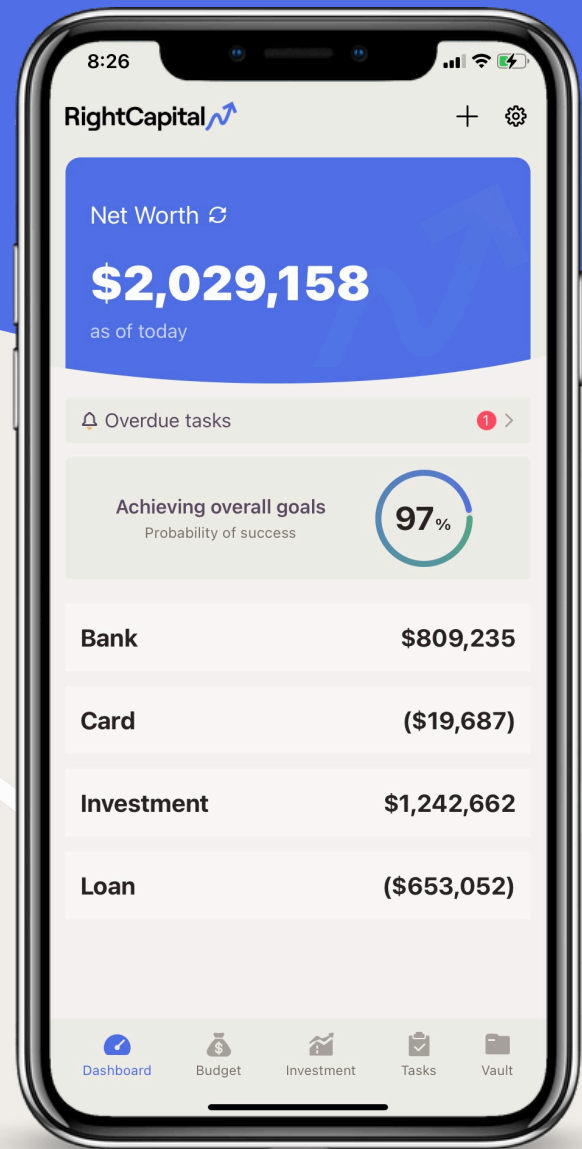


# Give mobile app access to your clients!

## The RightCapital mobile app lets your client:

- Link accounts and view balances
- View the probability of success
- Track expenses against their monthly budget goals
- Create budget categories
- Review and re-categorize transactions
- View asset allocation for all holdings or by account
- Create and complete tasks
- Receive notifications regarding upcoming tasks
- Upload files securely in the Vault

Before your client downloads the app, make sure you've invited them to the Client Portal and they have set up their RightCapital account.



Available on Apple App Store and Google Play

To download, scan the QR code or search [RightCapital](#)





# Mobile App Features

## Dashboard

- See net worth, probability of success, and accounts
- View all your financial accounts (bank, credit card, investment and loan) on the go
- Tap on individual accounts to access specific details

## Vault

- Upload a file from your phone or photo gallery
- Snap a photo of a document using your camera
- Download, rename, or delete existing files

## Investment

- See a detailed overview of your asset allocation
- Filter through accounts to see their individual asset allocation

## Tasks

- View all current and completed tasks
- Create tasks
- Mark tasks as complete

## Budget

- Set budget goals and track spending
- Use the Activity tab to identify spending patterns