

LINKING YOUR ACCOUNTS

Linking your accounts is quick and easy. Just follow the steps below:

1. Log in to your RightCapital portal (either on your computer or mobile device)
2. Go to your profile → Net Worth
3. Use the green **LINK ACCOUNT** button on the Net Worth screen to link accounts from a financial institution
4. Selecting Link Account displays a dialogue box with quick links to common institutions and a thorough search feature to find available institutions. To search, type the name of the institution in the search box (not the URL)
5. Enter the username and password that you use to log in to that financial institution's website

NOTE The accounts will begin to sync unless additional information is required (e.g. two-factor authentication). Please ensure that two-factor authentication is enabled if applicable.

Please do not close the web window during the syncing process.

IMPORTANT INFORMATION

It's important to know that some links will require you to re-enter your username, password, and two-factor authentication information to refresh the account. You should log in frequently to ensure the link is refreshing successfully. You can select the manual refresh button next to Net Worth. If the link option appears under "import in progress," this could mean the link requires your information to be entered again.

At various institutions, passwords are set to expire after a period of time. If this happens, first update your password at your financial institution and then update the connection on your portal.

Insurance plans cannot be linked.

If linking an Employee Stock Ownership Plan or Employee Stock Purchase Plan, the aggregator may provide us with the share value, but not the individual options.

WHAT HAPPENS ONCE LOGIN CREDENTIALS ARE ENTERED?

The information provided will be used to retrieve balance and position information, as well as to create a link to the account that RightCapital will use to update those values at each new login session to RightCapital.

If a bank or credit card account is linked, RightCapital will retrieve the past three month of transactions for use within the Budget tool.

Depending on the number of accounts and transactions at the financial institution, it may take a few moments to import the information. During import accounts may not display on the account list.

Accounts will generally update daily, but may update less frequently depending on the type of authentication used. To refresh all connections, click on the circular arrow to the right of the Net Worth value