

Below are common error messages and troubleshooting tips for each.

We could not update your account because your username and/or password were reported to be incorrect. Please re-verify your username and password.

Are you using the correct link option? Please compare the Login Address to the URL you use outside of RightCapital. You can check this by clicking on the Link Option > Login Address > Click the green arrow (this should redirect you to the site you use outside of RightCapital).



Still having an issue after confirming the correct link option?

Do you have two-factor authentication set up on your account? Two-factor authentication is an additional layer of security that institutions can offer. Most link options require you to have this set up when linking through a third-party aggregator. If you are unsure how to set this up, please contact your institution for help.

If you are still receiving an error message, please leave the error message under "Import in progress". This way, your advisor can let the RightCapital support team know of the issue and the team can investigate.

NOTE: Please do not delete an account that has been linked. This will not resolve the error and could result in data loss.

We could not update your account because your financial institution website is experiencing technical difficulties.

Please do not delete the link under "Import in progress" under Net Worth. Contact your advisor so that our team can help resolve the issue.

Your request has timed out as the required security information was unavailable or was not provided within the expected time. Please try again.

The link option is asking you to re-enter your username and password and two-factor authentication. Once this information is entered, the account will successfully refresh.

We could not update your account because it appears your account has been locked. This usually results from too many unsuccessful login attempts in a short period of time. Please visit the site or contact Customer Support to resolve this issue. Once done, please update your account credentials in case there were changes.

Please reach out to your institution to get your account unlocked.