

While there may be additional elements to your process, below are the essentials for setting up a new client on RightCapital.

Create client and determine input process

Action: Create client. Choose advisor, client, or hybrid input ([Adding a client](#))

Profile ([Creating plans](#) and [Completing Your Profile video](#))

Leverage the 6 steps to laying the foundation. Whether you're inputting the profile, the client is, or you're taking the hybrid approach and setting up a few cards to "prime the pump", these are the steps to achieve your goal. For more, watch the [Presenting RightCapital video](#).

Action: Set up client household and residence state ([Family profile](#))

Action: Add salary and other income ([Salary and other income](#))

Action: Set up client's savings plans for now through retirement ([Savings](#))

Action: Set up assets and liabilities, including linking accounts ([Net Worth](#))

Action: Add client's pre-retirement and local tax expenses ([Expenses](#))

Action: Establish the goals of the client ([Goals](#))

Bonus: Don't forget to add other assets ([Creating plans](#))

Build proposal

Your client has their current roadmap. Build a proposal to show them a better way. Your way.

Action: Review portfolio investment rate of return ([Return assumptions](#))

Action: Review profile for accuracy and completeness

Action: Select client's preferred planning method ([Planning methods](#))

Action: Develop client proposal using Action items in the Analysis tab ([Analysis](#))

Client Meeting

You've got the client's profile set and proposal built. Now let's prepare for the client meeting!

Action: Review proposal with your client ([Client meetings best practices](#))

Action: Create any follow-up tasks for you and your client ([Tasks](#))

Action: Print reports to share with client and save to vault ([Reports](#) and [Vault](#))

Action: Invite clients to your portal ([Inviting clients](#))

Do you feel ready? If not, drop a line with our team for best practices.

Got questions? Contact us at support@rightcapital.com or chat with us!