



Tips:

1. Include the basics on how and why your client will use the portal
2. Set a time frame for completion

Tips:

1. While completely optional, this is often used as a reminder to help the client to learn more about your services, how to use them, and increase communication

Tips:

1. Incorporate RightCapital into your client meetings
2. Use their portal to keep your clients informed about their plan, portfolio, and budgeting
3. Use RightCapital tasks for tracking