RightCapital Implementation Checklist

Launch RightCapital

☐ Create two clients

One of the first things to do is to set up at least two clients—one should even be yourself! Use these short videos as guides.

- ☐ Action: Set up two clients and start their financial plans (Creating plans)
- ☐ Action: Create client proposals (Multiple scenarios and Retirement video)

☐ Familiarize yourself

Advisors tell us they get the most out of RightCapital when they spent 1-2 hours learning the software. A small investment upfront pays dividends over the next few weeks (and years!). For instance, pick a webinar topic that's relevant to you, or peruse our video library and Help Center.

- ☐ Training: Review our Upcoming and most recent webinars
- ☐ Training: chat with Support — use the chat bubble to ask a question

☐ Integrations

Save time with one or more integrations. Explore the integrations list.

- ☐ Action: Review list of Integrations to improve efficiency

☐ Invite a client to their portal

Two heads are better than one, right? Invite a trusted client or friend to refine your RightCapital presentation. Don't forget: add yourself as a client for that valuable perspective.

- ☐ Action: Send introduction or client meeting email (Introducing RightCapital)
- ☐ Action: Ensure your client has the right access (Granting access)
- ☐ Action: Invite clients to their account (Inviting your client)
- ☐ Action: Share client-facing resources to guide them step-by-step (resources)

Make the most of your trial's Premium features by testing the Account Aggregation and Budgeting during your free trial

All set? Go forth and be the change your clients need and want.

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