



EVEREST
FINANCIAL ADVISORS

UNIFY YOUR FINANCIAL STORY

Making holistic financial decisions in an age where so much is changing daily can be difficult. We often tally up our total cash and debt on a piece of paper — or worse, in our heads. Decisions are often made in a silo, instead of with all available information. Some decisions are even made without our financial planners knowing the whole story!

Think about how your financial future could look if both you and your advisor had all the facts that comprise your financial picture...retirement, tax planning, debt repayment, and more.

Add your financial accounts (bank, investment, debt accounts) to your RightCapital client portal and see your unified financial view in one place.

LINKING ACCOUNTS

Link your accounts to your portal for a centralized financial story. Linking your accounts is *quick* and *simple*. Just follow these five steps:

1. Log into your RightCapital client portal by visiting EverestFA.com (either on your computer or mobile device)
2. Go to your profile
3. Click “**Link Account**”
4. Type the name of the institution in the search bar
5. Enter your username and password

TIP: the accounts will begin to sync and may require additional information (such as a confirmation code). You can enter this by clicking on the Account in the left-hand menu display.

USE YOUR PORTAL TO EXPLORE FUTURE OPPORTUNITIES AND ENHANCED ADVICE

RUNNING INTO DIFFICULTY? TRY THESE STEPS:

1. **Multi-factor security.** Based on your bank’s security settings, you may need to enter your security answer or code from an email, text message, or phone call as well. RightCapital will prompt you for this information when you select the account in question.
2. **Test your username and password.** Log in directly to your financial institution to ensure you have the correct credentials.
3. **Website match.** Some institutions have multiple logins for different subsidiaries. Make sure the website address and financial institution match.
4. **Re-input credentials.** At various institutions, passwords are sometimes set to expire after a period of time (for example, 120 days). If this happens, first update your password at your financial institution and then update the connection on your portal.
5. **Don’t delete the account.** Deleting a connection will remove any accounts and transaction history. This can affect your spending and budgets.
6. **Contact your advisor.** Still having problems connecting an account? Email your financial advisor at info@everestfa.com to request assistance — just leave any error in place and let them know the financial institution link you’re having difficulty with.

TIPS WHEN ADDING AND MANAGING ACCOUNTS

FINANCIAL HISTORY. When you first link your bank and credit card accounts, it will retrieve the last three months of transaction data and continually add to it.

UPDATING CREDENTIALS. Keep in mind that when you change your username and/or password at your bank, you’ll need to update your portal, too.