

The Vault – Your Shared Online Document Storage Solution with Breeden & Associates, LTD

Breeden & Associates, LTD utilizes a system called RightCapital for financial planning and tax solutions.

RightCapital also features an online electronic filing cabinet – called “The Vault” - which you can upload documents and files to. Through this system, you also have full access to the rest of the site as well. Feel free to import or add financial accounts, data links, etc., although you are not required to do so for access to your tax documents.

For tax purposes and for clients uploading forms for Breeden to review/print for their tax preparation processes, there is a “Shared” folder, which is shared between Breeden & Associates, LTD and you as our client. We ask you to please upload and download documents from this shared space.

Accessing the Portal on Right Capital for Document Storage


Setting Up a brand new RightCapital Account

You will need to have a Right Capital Account to be able to access the vault. Breeden & Associates, LTD will be sending out invitation links to pre-existing tax clients who have used our previous system the “Secure Portal” at breedencpa.securefilepro.com.

If you do not have an account, or have not been sent an invitation link, please visit our website www.breedencpa.com to set your own up directly.

Click on “Resources”, “Featured Links” and then select the “RightCapital – Financial Planning and Analysis Tool”. You will be prompted to sign up for a new account.

If You Already Have an Account

- Visit our website www.breedencpa.com and click on “Resources”, “Featured Links” and then select the “RightCapital – Financial Planning and Analysis Tool”.
- Click on the “Log In” link for those who already have an account.
- Enter your email address and password, type in this information to access your account.
 - (If you forgot your password, please click “forgot password” to follow those procedures)
- Your account will open in the Dashboard view. To access the storage vault, you will click on the gear icon pictured like this at the very top right  and then click on “Vault”.
- Once in the Vault, you can create a new folder or add a file directly to the current folder.
- To add a file, you will click on “Add File”. You can either drop the files directly into the pop-up screen OR you can click on the green “Pick files from your computer” to locate files.
- The selected file will appear in your pop-up window. Click the green button titled “Add to vault” to upload.
- The uploaded file will appear in your vault.

- **IMPORTANT NOTE:** For Breeden to be able to see your documents you have uploaded, please make sure the documents are sent to the “Shared” folders. Also, please contact your accountant to let them know via e-mail or phone call.
- You may Log out when you have complete uploading your tax documents, or you may feel free to explore the rest of the RightCapital financial planning options available to you.

Here’s how to get to the Vault with full pictures of Screenshots:

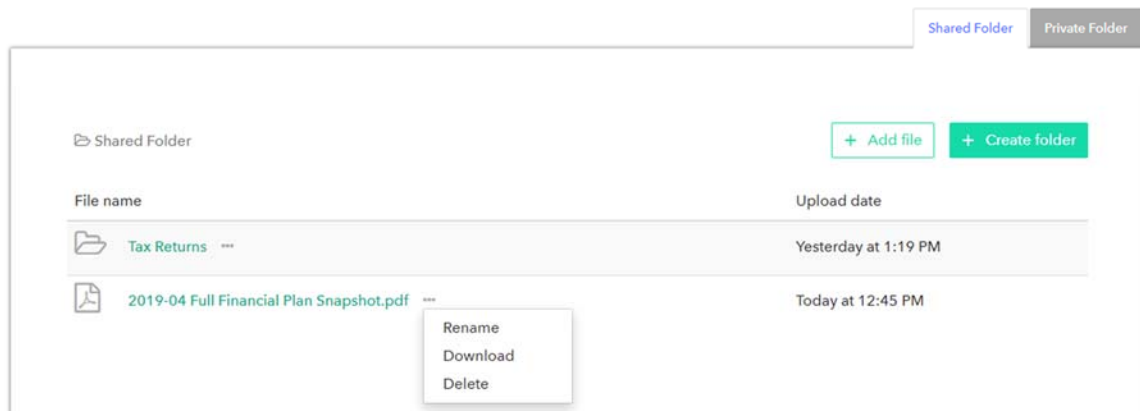


Click the Gear Icon to access the Vault. Once you click the Vault in the sub-bar, it will show you a page similar to this:



Vault

The vault is a place where you can store important files that you can access from anywhere. Both you and your advisor can store files in the shared folder that you can both access. In addition, you can store files in your private folder that only you have access to.



From here, you can add/edit names of documents, create folders to help keep similar documents in the same area of the Vault, or even delete files, so be careful when navigating the (***) button to do so.