Financial Planning Overview

01/30/2025 4:43 pm CST

Financial Planning Portal

Interactive financial planning that helps us create and monitor your personalized financial plan to reach your goals.

Program Overview

Clients with assets exceeding $500,000 under Financial Gravity gain exclusive access to our advanced financial planning software, RightCapital. This powerful platform provides a comprehensive retirement analysis, empowering clients to evaluate their progress and stay on track toward achieving a secure and successful retirement. Through a seamless, holistic portal, RightCapital allows you and your dedicated advisor to manage all aspects of your financial planning needs. From creating detailed income projections and savings strategies to optimizing cash flow, budgeting, and investment allocation, this tool ensures every element of your financial plan is integrated. It also supports goal tracking, tax planning, Social Security optimization, risk management, and scenario analysis, giving you the clarity and confidence to make informed decisions and achieve your long-term financial goals.

Our Goal

Our goal is to get our client's Probability of Success (POS) score over 85% in our planning software. The POS is measured using a "Monte Carlo simulation," which is calculated by running the projection of your portfolio 1,000 separate times. Some sequences of returns used in the Monte Carlo simulation will give you better results, and some will give you worse results. These multiple trials provide a range of possible results. Right Capital considers a trial to be “successful” if your invested assets are greater than zero at the end of your planning horizon. The percentage of successful trials is the POS of your plan, with all its underlying assumptions.

Financial Planning Portal Access

You can log into Right Capital by clicking here: https://app.rightcapital.com/account/login

If you do not yet have access, reach out to clientsuccess@financialgravity.com.

Financial Planning Portal Setup and Guides

Getting Started

Client Profile Guide

Linking your Accounts