



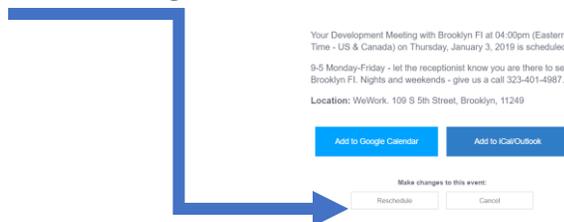
HOW TO GET THE MOST OUT OF THIS RELATIONSHIP

1. **Learn to love [Right Capital](#).** This dynamic and easy-to-understand software is a powerful financial planning tool. We need your help keeping your net worth accurate in Right Capital so do pop in monthly to refresh any bank connections that have dropped. Please make sure you download the [Right Capital app](#) where you can categorize your expenses easily. All of our recommendations will live as “Tasks” in Right Capital so you’ll know when you need to take action.

2. **Get organized and efficient.** Your going to have a lot of log-ins. We are a 100% digital firm and use technology to simplify your financial life. With so many passwords and solutions we want to help you stay organized. We HIGHLY recommend a password manager like [Lastpass](#) (it’s free) so we don’t get stuck on “Forgot My Password” each meeting. Please create [a bookmarks folder](#) in your browser called “Brooklyn FI” and add the following bookmarks for easy access.

[Right Capital](#) * [FileThis](#) * [AdvicePay](#) * [Social Security](#) * [Credit Karma](#) * [Calendly](#) * [New Clients](#)

3. **Calendly is your gateway to Brooklyn FI.** You’ll book all your meetings via this online scheduling tool. We understand that life gets in the way and you may need to reschedule a meeting once in a while. You can **reschedule** right from the bottom of the Calendly confirmation or reminder email.



4. **Life happens and things don't always go according to plan.** Use us! While we generally have five meetings the first year and four the second year on a quarterly schedule but you are always welcome to book time to see us for major changes and decisions. [You can schedule a 30-minute call anytime here.](#)

5. **You can never give us too much information.** It may seem like were asking for obscure documents that don’t matter but we’re basically putting together a 5,000-piece puzzle of your financial life and every clue we have is helpful. We can always scan documents for you in our office if don’t have digital copies. Please don’t wait till the last minute to complete tasks. Uploading a document the day before a meeting isn’t going to make it in to our discussion.

6. **Don't forget about open enrollment.** We are here to walk you through every step. Most companies have open enrollment for their benefits programs in November and December which falls during our 4th quarter meeting. If your employer has a different enrollment period, please let us know and we will book a separate meeting to walk through it with you.