

RightCapital.

SEI Strategic Partner



Leverage our relationships to get discounted pricing on valuable services.

As part of our continued commitment to help advisors power wealth and focus on client relationships, we have established strategic partnerships with several key business service partners to help you **reduce costs**, **save time** and **increase efficiencies** to run a more successful firm.

RightCapital

Founded in 2015, RightCapital is the fastest-growing financial planning software with the highest user satisfaction among advisors, according to a recent Kitces survey (Source: The Kitces Report Volume 1, 2023). RightCapital's modular platform includes interactive retirement planning, tax-efficient distribution strategies and visual Roth conversion tool, Social Security and Medicare planning, budgeting, student loan management, insurance needs analysis, estate planning and more. RightCapital's interactive, intuitive visuals make it easy for advisors to illustrate multiple planning scenarios and show the dollar impact of their recommendations in real time.

Contact

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Discount

10% off monthly payments, 20% off annual payment

Website

www.rightcapital.com

Important information

SEI is not affiliated with any firms mentioned herein. SEI Global Services, Inc. has contracted with listed vendors to provide these services to select Independent Advisor Solutions by SEI clients. Information provided by SEI Investments Management Corporation, a wholly owned subsidiary of SEI Investments Company.