

## INTRODUCING LIFE VIEW:

*Life View* is a unique online portal where all of your important financial information can be consolidated in one place and updated daily. That up-to-date information is then coordinated with your financial plan. Using the latest data aggregation and secure online storage, *Life View* can, not only, make your life easier, but also allow for RFG to have a deeper insight into your financial picture, and the ability to provide more proactive advice. You can also provide access of your personal information to loved ones in a time of crisis.



## In summary, *Life View* offers:

- **Account Aggregation** - A single online portal to all of your financial information including your mortgage, retirement accounts, credit cards and rewards programs in addition to your accounts managed by RFG.
- **The Vault** - A private and secure place to store your important financial documents including tax returns, legal documents, copies of passports and driver's licenses, as well as treasured photos, videos and/or sound files.
- **A Continually Updated Financial Plan** - When the value of your assets change, the information is updated automatically keeping your plan up-to-date and enabling your advisor to provide proactive advice and timely feedback.
- **Making Your Life Easier!** - Our staff is ready to set up your personal website, establish account connections and upload your documents. *Life View* provides organization, with a single sign on, for all your personal financial information.

### Get Started Today! -

Contact our staff and schedule your set up meeting at our office or online.

For more details about how *Life View* works, click the following link to view a short video:

<https://youtu.be/19ypwsHDWm4>

