

INTRODUCING LIFE VIEW:

Life View is an exclusive online platform that consolidates your financial data in a single location, updated daily. This information is seamlessly integrated with your financial plan using advanced data aggregation technology and secure online storage. Life View enhances convenience while enabling RFG to gain deeper insights into your financial landscape, facilitating more proactive advice. Additionally, the platform offers the option to grant access to this information to trusted individuals in your life.



In summary, Life View offers:

Account Aggregation

A unified online portal for comprehensive access to your financial data, encompassing mortgages, investment accounts, credit cards, etc.

The Vault

A secure repository for vital financial records such as tax returns, legal papers, IDs, and cherished multimedia files

A Continually Updated Financial Plan

As asset values shift, automatic updates maintain your plan's accuracy, empowering advisors to offer proactive guidance and prompt feedback

Making Your Life Easier!

Our team is prepared to create your personal website, establish account links, and upload documents. Life View ensures streamlined organization through a unified single sign-on for your financial details

Get Started Today!

Contact your RFG Service Team to help you get set up on Life View!