NEWS RELEASE

RightCapital Announces Tax Strategy Module, Generating Optimal Tax-Adjusted Portfolio Values with One-Click

2024-09-26

With the Click of a Button, Advisors Can Create the Optimal Tax Strategy for their Clients; Balancing Asset Location, Withdrawal, and Roth Conversion Strategies.

SHELTON, CT / ACCESSWIRE / September 26, 2024 / **RightCapital**, the fastest-growing financial planning software for financial advisors, today introduced a breakthrough in how advisors build tax strategies for their clients. The new tax strategy module, a first for the industry, enables advisors to easily identify changes to asset location strategy, withdrawal strategy, and Roth conversion strategy to generate the optimal tax-adjusted ending portfolio value for their clients. These capabilities are designed to benefit clients planning for retirement with asset location strategies, as well as those already in retirement with an optimal tax distribution strategy.

"When we consider major updates to RightCapital, we begin by listening to our advisors - hearing about what they love and what they'd like to see more of within the platform," said Dain Runestad, SVP of Product at RightCapital. "Active users of our tax distribution features have been looking for a feature like this to save precious time during the planning process.This new tax strategies feature strengthens advisor-client relationships by differentiating the advice advisors can provide."

The RightCapital platform has long-offered expansive capabilities for advisors -dynamically testing the impact that different tax distribution strategies can have on client portfolios. With this new update, RightCapital is arming advisors with a one-click solution, that removes the need to manually test and adjust client plans to achieve the optimal tax strategy. The new asset location module is a breakthrough in the financial planning space, allowing advisors to visualize asset allocation and set an appropriate asset location strategy for clients before they reach retirement age.

"RightCapital's track-record of innovation is one of the reasons we are the fastest growing financial planning software in the market," said Shuang Chen, co-founder and CEO of RightCapital. "With these new tax strategies features, we are confident that advisors can identify new opportunities for clients to grow their assets and ultimately achieve their financial goals."

Image: Advisors will be able to see the top 5 tax strategies, ranked based on the tax-adjusted ending portfolio value

These advanced tax strategy capabilities are available to all advisors leveraging RightCapital's **Basic, Premium, and Platinum subscriptions**. To learn more about RightCapital, contact RightCapital Sales at **rightcapital.com/book-demo**, **sales@rightcapital.com** or (888) 982-9596 Opt 1.

About RightCapital

RightCapital's mission is to create Right Plans for Real People™. RightCapital is used by thousands of financial advisors to grow their practices and set their clients on the path to financial success. Founded in 2015, RightCapital is the fastest-growing financial planning software with the highest user satisfaction among advisors (Source: **The Kitces Report - 2023 AdvisorTech Study**). For more information, visit **https://www.rightcapital.com**.

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SOURCE: RightCapital Inc