

**PRECISEFP / RIGHTCAPITAL MAPPING TABLE**

RightCapital Section	PreciseFP Section		Comments
Household	Client Details		<i>Integrates client 's details</i>
RightCapital Field	PreciseFP Field	Required	Comments
Address	Client Details/Contact Details/Address	Yes	<i>non-U.S. numbers will not integrate</i>
Email	Client Details/Contact Details/Email	Yes	
Cell Phone	Client Details/Contact Details/Mobile Phone		
Home Phone	Client Details/Contact Details/Home Phone		
Work Phone	Client Details/Contact Details/Work Phone		

RightCapital Section	PreciseFP Section		Comments
Client/Co-client	Client Details		<i>Integrates client/co-client details</i>
RightCapital Field	PreciseFP Field	Required	Comments
First Name	Client Details/Personal Details/First Name	Yes	
Last Name	Client Details/Personal Details/Last Name	Yes	
Middle Name	Client Details/Personal Details/Middle Name		
Birthday	Client Details/Personal Details/Birthdate		

RightCapital Section	PreciseFP Section		Comments
Persons	Children		<i>Integrates records where Type is "Child"</i>
RightCapital Field	PreciseFP Field	Required	Comments
First Name	Family Members/Children/First Name	Yes	
Last Name	Family Members/Children/Last Name	Yes	
Birthday	Family Members/Children/Birthdate		
Type	<i>Child</i>	Yes	

RightCapital Section	PreciseFP Section		Comments
Persons	Other Family Members		<i>Integrates records where Type is "Grandchild"</i>
RightCapital Field	PreciseFP Field	Required	Comments
First Name	Family Members/Other Family Members/First Name	Yes	
Last Name	Family Members/Other Family Members/Last Name	Yes	
Birthday	Family Members/Other Family Members/Birthdate		
Type	Family Members/Other Family Members/Relationship	Yes	

RightCapital Section	PreciseFP Section		Comments
Salary	Employment & Income		<i>Integrates Employment Income value</i>
RightCapital Field	PreciseFP Field	Required	Comments
Name	Employment & Income/Employment/Employer	Yes	<i>"Salary"</i>
Annual Amount	Employment & Income/Employment/Salary & Tips	Yes	
End date type	<i>Client's retirement</i>	Yes	
Start date type	<i>Already started</i>	Yes	
Income value type	<i>Annual amount</i>	Yes	
Type	<i>Salary</i>	Yes	

RightCapital Section	PreciseFP Section		Comments
Bonus	Employment & Income		<i>Integrates Bonus Income value</i>
RightCapital Field	PreciseFP Field	Required	Comments
Name	<i>Bonus</i>	Yes	
Annual Amount	Employment & Income/Employment/Bonus & Commissions	Yes	
End date type	<i>Client's retirement</i>	Yes	
Start date type	<i>Already started</i>	Yes	
Income value type	<i>Annual amount</i>	Yes	
Type	<i>Bonus</i>	Yes	

RightCapital Section	PreciseFP Section		Comments
Self-Employment Income	Self-Employment Income		<i>Integrates Self-Employment Income value</i>
RightCapital Field	PreciseFP Field	Required	Comments
Name	<i>Self-Employment</i>	Yes	
Annual Amount	Employment & Income/Annual Income/Self-Employment Income	Yes	
End date type	<i>Client's retirement</i>	Yes	
Start date type	<i>Already started</i>	Yes	
Income value type	<i>Annual amount</i>	Yes	
Type	<i>Self-Employment</i>	Yes	

RightCapital Section	PreciseFP Section		Comments
Pensions & Annuities	Pensions/Annuities Income		<i>Integrates Pensions &amp; Annuities Income value</i>
RightCapital Field	PreciseFP Field	Required	Comments
Name	Employment & Income/Pensions & Annuities/Name	Yes	

Annual Amount	Employment & Income/Pensions & Annuities/Income	Yes
Start date type	Already started	Yes
Income value type	Annual amount	Yes
Type	Pension	Yes

RightCapital Section	PreciseFP Section	Comments
Other Income	Other Income	Integrates Other Income value
RightCapital Field	PreciseFP Field	Required
Name	Other Income	Yes
Annual Amount	Employment & Income/Annual Income/Other Income	Yes
End date type	Client's end of plan	Yes
Start date type	Already started	Yes
Income value type	Annual amount	Yes
Type	Other Income	Yes

RightCapital Section	PreciseFP Section	Comments
Expenses	Monthly Variable Expenses	Exports Total Variable Expenses value
RightCapital Field	PreciseFP Field	Required
Name	Variable Living Expenses	Yes
Monthly Amount	Cash Flow & Net Worth/Monthly Cash Flow/Total Variable Expenses	Yes
Start date type	Already started	Yes
Type	Living	Yes

RightCapital Section	PreciseFP Section	Comments
Expenses	Monthly Fixed Expenses	Exports Monthly Fixed Expenses value
RightCapital Field	PreciseFP Field	Required
Name	Fixed Living Expenses	Yes
Monthly Amount	Cash Flow & Net Worth/Monthly Cash Flow/Total Fixed Expenses	Yes
Start date type	Already started	Yes
End date type	End of both plans	Yes
Type	Other	Yes

RightCapital Section	PreciseFP Section	Comments
Expenses	Monthly Tax-related Expenses	Exports Total Tax-Related Expenses value
RightCapital Field	PreciseFP Field	Required
Name	Tax-related expenses	Yes
Monthly Amount	Cash Flow & Net Worth/Monthly Cash Flow/Total Tax-related Expenses	Yes
Start date type	Already started	Yes
End date type	End of both plans	Yes
Type	Other	Yes

RightCapital Section	PreciseFP Section	Comments
Retirement expense	Retirement Goals	Integrates Retirement goals records
RightCapital Field	PreciseFP Field	Required
Name	Retirement Goals	Yes
Cost Amount	Goals/Retirement/Savings Needed	Yes
Start date type	Client's retirement	Yes
End date type	End of both plans	Yes
Type	Retirement expense	Yes
Cost Value type	Monthly Amount	Yes
Frequency	One Time	Yes

RightCapital Section	PreciseFP Section	Comments
Vacation	Travel Goals	Integrates Travel goals records
RightCapital Field	PreciseFP Field	Required
Name	Goals/Travel/Description	Yes
Cost Amount	Goals/Travel/Annual Amount Needed	Yes
Start date type	Calendar year	Yes
Start date value	Goals/Travel/Start Year	Yes
Type	Vacation	Yes
Cost Value type	Monthly Amount	Yes
Frequency	One Time	Yes
Owner	Goals/Travel/For	Yes

RightCapital Section	PreciseFP Section	Comments
Wedding	Wedding Goals	Integrates Wedding goals records
RightCapital Field	PreciseFP Field	Required
Name	Wedding	Yes

Cost Amount	Goals/Wedding/Annual Amount Needed	Yes	be correctly selected.
Start date type	Calendar year	Yes	
Start date value	Goals/Wedding/Year	Yes	
Type	Wedding	Yes	
Cost Value type	Annual amount	Yes	
Frequency	One Time	Yes	
Owner	Goals/Wedding/For	Yes	

RightCapital Section	PreciseFP Section		Comments
College	College Goals		Integrates College goals records
RightCapital Field	PreciseFP Field	Required	Comments
Name	College	Yes	The name field must be mapped for the field (ownership) for the goal owner to be correctly selected.
Cost Amount	Goals/College/Annual Amount Needed	Yes	
Start date type	Calendar year	Yes	
Start date value	Goals/College/Start Year	Yes	
Type	College	Yes	
Cost Value type	Annual amount	Yes	
Frequency	One Time	Yes	
End date value	Goals/College/End Year	Yes	
End date type	Calendar year	Yes	

RightCapital Section	PreciseFP Section		Comments
Pre-college	Private School Goals		Integrates Private School goals records
RightCapital Field	PreciseFP Field	Required	Comments
Name	Private School	Yes	The name field must be mapped for the field (ownership) for the goal owner to be correctly selected.
Cost Amount	Goals/Private School/Annual Amount Needed	Yes	
Start date type	Calendar year	Yes	
Start date value	Goals/Private School/Start Year	Yes	
Type	Pre-college	Yes	
Cost Value type	Annual amount	Yes	
Frequency	One Time	Yes	
End date value	Goals/Private School/End Year	Yes	
End date type	Calendar year	Yes	

RightCapital Section	PreciseFP Section		Comments
Personal Gift	Gift or Donation Goals		Integrates Gift or Donation goals records
RightCapital Field	PreciseFP Field	Required	Comments
Name	Goals/Gift or Donation/Description	Yes	The name field must be mapped for the field (ownership) for the goal owner to be correctly selected.
Cost Amount	Goals/Gift or Donation/Annual Amount Needed	Yes	
Start date type	Calendar year	Yes	
Start date value	Goals/Gift or Donation/Start Year	Yes	
Type	Personal Gift	Yes	
Cost Value type	Annual amount	Yes	
Frequency	One Time	Yes	
Owner	Goals/Gift or Donation/For	Yes	

RightCapital Section	PreciseFP Section		Comments
Other Goal	Other Goals		Integrates Other goals records
RightCapital Field	PreciseFP Field	Required	Comments
Name	Goals/Other Goal/Description	Yes	The name field must be mapped for the field (ownership) for the goal owner to be correctly selected.
Cost Amount	Goals/Other Goal/Annual Amount Needed	Yes	
Start date type	Calendar year	Yes	
Start date value	Goals/Other Goal/Start Year	Yes	
Type	Other Goals	Yes	
Cost Value type	Annual amount	Yes	
Frequency	One Time	Yes	
Owner	Goals/Other Goal/For	Yes	