

Capstone Online Wealth Center

Financial planning is typically done in an old-school “pen and paper” environment, and in turn, advisors are only as up-to-date as the client statements they are given. We think there’s a better way. In fact we’ve made a better way – the Capstone Online Wealth Center. This personal financial website allows you single sign-on access to all of your assets, liabilities, and important financial documents, each updated on a daily basis. It serves as a “living and breathing” online balance sheet, and in turn, allows us to make proactive recommendations at a moment’s notice.

Your Capstone Online Wealth Center Includes:

A Personal Financial Home Page

We want to make your life easier, both on a daily basis and maybe more importantly, at a time of crisis. Rest assured that your privacy and security is priority number one. All of your financial information is secure and encrypted. Unlike online banking, online shopping, or bill pay, where money can be moved, our system is non-transactional. With one single sign-on you can see your entire financial world with one click.

A Central Location of Aggregated Accounts

As your wealth has grown, so too has the complexity of keeping it all organized. With Capstone Wealth Partners, all of your accounts (even those not directly managed by CWP) can be viewed in one online location, giving you a consolidated view of your entire financial picture right at your fingertips. Daily updates are available to both you and us – accessible at any time and from any place with an internet connection.

Your Secure Online Vault

Would your loved ones know where to access all of your important documents if a crisis struck? Your secure online file vault is a storage facility that keeps and protects valuable personal documents such as wills, trusts, tax returns, insurance documents, and passports in an electronic format. Documents can be scanned and stored in your vault, making them easy to obtain for you and your family from anywhere there is internet access.