



A Portal for Every Piece of Your Financial Life



The Leonard Rickey Investment Advisors online financial management portal provides the tools you need to manage the most important parts of your financial life—from any device.



Collaborate with Our Team

- Web chat or screen share with our team directly through your portal
- Securely store and share documents in the document vault
- Stay on track and organized with action steps



View Your Full Financial Picture

- Connect your financial accounts for automatic updates
- See and update your financial goals
- Track investment performance
- Monitor your balance sheet



Stay Up to Date and Informed

- View key reports on demand
- Access news feed from team to stay up to date



Put Your Plans Into Action

- Run “what-if” scenarios to see how different decisions affect your plan
- View and update your risk tolerance assessment

With any questions, reach out to gunnar@erickey.com or call 509-972-3686.

