



AdvicePay Feature Set



Have Questions?

Contact sales@advicepay.com

Essential

All the basics for a new firm or solopreneur.

Professional

Perfect for advisors and ensemble firms looking for multiple advisor accounts, advanced features, and customization options.

Enterprise

An advanced platform for enterprise firms who require additional support, customized features, and API integration.

Users

Clients	*Up to 10	✓ Unlimited	✓ Unlimited
Advisors	*1 Independent Advisor	✓ Unlimited	✓ Unlimited

Transactions

One-Time Payments	✓	✓	✓
Subscriptions	✓	✓	✓
Transfers	✓	✓	✓
Invoice Approval Process	✗	✓	✓

eSignatures

Clients	✗	✓	✓
Advisors	✗	✓	✓

Settings

Company			
Firm Name	✓	✓	✓
Logo	✗	✓	✓
Admin Users	✗	✓	✓
Billing			
Change Plan	✓	✓	✓
Billing History	✓	✓	✓

Essential**Professional****Enterprise****Settings (cont.)**

	Essential	Professional	Enterprise
Transactions			
Invoice approvals	✗	✗	✓
Subscription Date Range	✓	✓	✓
Max Invoice Amount & Subscription Term	✓	✓	✓
Invoice Disclosure	✗	✓	✓
Description of Services	✓	✓	✓
Document Vault			
Enable advisor to upload templates	✗	✓	✓
Email & Notifications			
Allow advisors to add custom messaging	✗	✗	✓
BCC Recipients	✓	✓	✓
Advisor Notifications	✓	✓	✓
Additional advisor-side email recipients	✓	✓	✓
Integrations	✗	✓	✓
Deliverables	✗	✗	✓

Essential

Professional

Enterprise

Custom Work

	Essential	Professional	Enterprise
Relationship Manager	✗	✗	✓
Custom Training & Webinars	✗	✗	✓
Custom Development Work	✗	✗	✓
API & Webhooks	✗	✗	✓
Due Diligence	✗	✗	✓

Ready to learn more about AdvicePay?

Let us give you a tour of the unique features of the platform and answer any questions you might have about how AdvicePay can work for you.

[See AdvicePay in Action!](#)