



ADVICEPAY CLIENT GUIDE

WHY IS MY ADVISOR USING ADVICEPAY?



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support@advicepay.com

www.AdvicePay.com

What is AdvicePay?

AdvicePay is a platform that makes it easier for you to make payments and quickly manage your billing online. AdvicePay accepts both credit/debit cards and checking accounts (ACH) for payment, which gives you the flexibility to pay via the method that is most convenient for you.

AdvicePay also has ability to send agreements out for signature, so your documents can get signed online without the hassle of printing or wet signing documents. Once you sign an agreement with your advisor, it will be stored within AdvicePay for you to easily access using your login at any time.

Why are we using AdvicePay?

- **Enhanced Efficiency:** AdvicePay automates many of the administrative tasks associated with paying your financial advisor, saving you time and effort.
- **Security:** AdvicePay never stores any of [your payment information](#) in the AdvicePay database, so you don't have to worry about your information being compromised. What's more, your advisor never sees your banking or credit card information. You enter that yourself through your client portal, and your advisor doesn't have access to it.
- **Automatic Monthly Billing:** For ongoing financial services, your financial advisor can choose to set you up on subscription payments. Subscription billing makes it easy for you, as you only have to approve their request once and the remaining monthly payments are automatically billed until you or your advisor cancels them. Click [here](#) for more information about how subscriptions work.
- **Transparency:** AdvicePay doesn't give your advisor the ability to withdraw your funds without approval. When your advisor requests payment from you, you can approve or deny the request. Plus if you are on subscription invoicing and your advisors makes changes to it you must approve the change.

How does it work?

There are two main ways to pay your advisor through AdvicePay:

While you do not need to register your account on AdvicePay to pay invoices, you're encouraged to do so in order to download PDF invoices, manage your payment methods, update your email address, and manage your email settings. That being said, AdvicePay does offer the ability for you to pay invoices -- as well as eSign documents -- all without setting up an account or logging in.

1. Through the AdvicePay Portal:

- a. **Login** to your AdvicePay account
- b. From the dashboard, you can:
 - i. **Find** your invoice under “**Invoices**” or “**Subscriptions**”
 - ii. **Select** the invoice and click “**Make Payment**”
 - iii. Choose your **payment method**

2. Via Invoice Link

- a. You'll **receive an email** with a link to your invoice
- b. **Click the link** that takes you to the AdvicePay portal
- c. You can choose to:
 - i. **Pay without logging in:** Enter your payment info directly and submit the payment
 - ii. **Log in to your account:** This allows you to manage past invoices and subscriptions

Learn how to pay with AdvicePay

Take the interactive demo

As you begin interacting with the AdvicePay, we recommend reading and bookmarking the following articles:

- [How to Make a Payment](#)
- [How to Sign Documents](#)