



GUIDE

Why is my advisor using AdvicePay?

What is AdvicePay?

AdvicePay makes paying for financial planning simple and stress-free. With support for credit/debit cards and checking account (ACH) payments, you can choose the option that's most convenient for you, all managed securely online.

Need to sign an agreement? No problem. AdvicePay lets you review and sign documents digitally, no printing or scanning required. Once signed, your agreements are automatically stored in your account, so you can access them anytime with just a quick login.

Why are we using AdvicePay?

Enhanced Efficiency

AdvicePay takes the hassle out of paying your financial advisor by automating many of the administrative tasks, saving you both time and effort.

Built-In Security

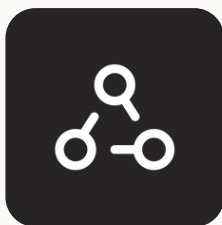
Your financial information stays protected. AdvicePay never stores your payment details in its database, and your advisor never sees your bank or credit card information. You securely enter it yourself through your client portal, ensuring only you have access to it.

Automatic Monthly Billing

If you're receiving ongoing financial services, your advisor can set up subscription billing for a seamless experience. You only approve the request once, and future monthly payments are automatically billed until you or your advisor cancels.

Full Transparency

With AdvicePay, your advisor can't withdraw funds without your approval. Every payment request must be approved by you, and if any changes are made to an ongoing subscription, you'll be asked to review and approve them first.



How does it work?

You have two easy ways to pay your advisor through AdvicePay: by logging into the AdvicePay portal or using a secure invoice link.

No account? No problem. You can pay invoices and e-sign documents quickly and securely without creating a login.

Want more flexibility? By registering your account, you'll unlock additional features, like downloading PDF invoices, managing payment methods, updating your email address, and customizing your email preferences, all in one convenient place.

1. AdvicePay Portal

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

2. Invoice Link

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



Secure, Easy Payments for Financial Planning

AdvicePay makes paying for financial planning simple, secure, and stress-free. Explore the resources on this page to learn more

See how to make a payment

[INTERACTIVE DEMO](#)

As you begin using the AdvicePay platform, we recommend reading and bookmarking the following articles.

[HOW TO MAKE A PAYMENT](#)

[HOW TO SIGN DOCUMENTS](#)