



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

For small to medium-sized firms needing additional advisor controls and oversight.

Enterprise PLUS

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

Users

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

Transactions

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

eSignatures

Clients	✗	✓	✓	✓
Advisors	✗	✓	✓	✓

Settings

Company				
Firm Name	✓	✓	✓	✓
Logo	✗	✓	✓	✓
Admin Users	✗	✓	✓	✓
Billing				
Change Plan	✓	✓	✓	✓
Enable advisors to pay for AP account	✗	✗	✓	✓
Billing History	✓	✓	✓	✓

Essential

Professional

Enterprise

Enterprise **PLUS**

Settings (cont.)

Billing				
Change Plan	✓	✓	✓	✓
Enable advisors to pay for AP account	✗	✗	✓	✓
Billing History	✓	✓	✓	✓
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	Enterprise PLUS
Custom Work				
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.

[Click here to book a one-on-one demo now!](#)