



A GUIDE BY ADVICEPAY

# WHY IS MY ADVISOR USING ADVICEPAY?



## Convenient Payment Methods

AdvicePay accepts both credit/debit cards and bank accounts (ACH) for payment, which gives you the flexibility to pay via the method that is most convenient for you. You can even pay with your brokerage account!

## Automatic Monthly Billing

For ongoing financial services, advisors 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.

## Secure Payments

AdvicePay never stores any of your payment information in the AdvicePay database, so you don't have to worry about your information being compromised. AdvicePay also uses Stripe, which is a U.S. based technology payment processor that processes billions of dollars each year and has the most stringent level of security certification available in the payments industry. Click [here](#) for more information about how AdvicePay protects your information.

## Transparency

AdvicePay helps your advisor avoid custody of your assets and maintain a fully transparent advising relationship with you in the following ways:

1. Unlike other payment processors, AdvicePay doesn't give an advisor the ability to withdraw your funds without their approval. When an advisor requests payment from you, you can approve or deny the payment request. Plus, if you are on subscription invoicing and your advisor makes changes to the subscription, you must approve the change as well.
2. 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.