bill.com

BILL.COM FOR

Family Office and Wealth Management Firms

Manage your client's bill pay with greater confidence

Efficiently manage and standardize your client's bill pay activities with faster payment options on a platform designed with privacy and security in mind.

Everything you need to confidently manage your client's bill pay

Efficient end-to-end bill pay workflows

- Save 50% of time managing your client's bill pay with auto-entry technology, easy bill routing and review, and your pre-determined approval workflow - no more handwritten signatures.
- Speed up account reconciliation by integrating your accounting system with Bill.com

Multiple payment options at your fingertips, to help you pay bills quickly

- Get more flexibility with different payment options including ACH, check, virtual cards, and international wire transfers.
- Use our expedited ACH payment options to pay on the same business day or overnight.

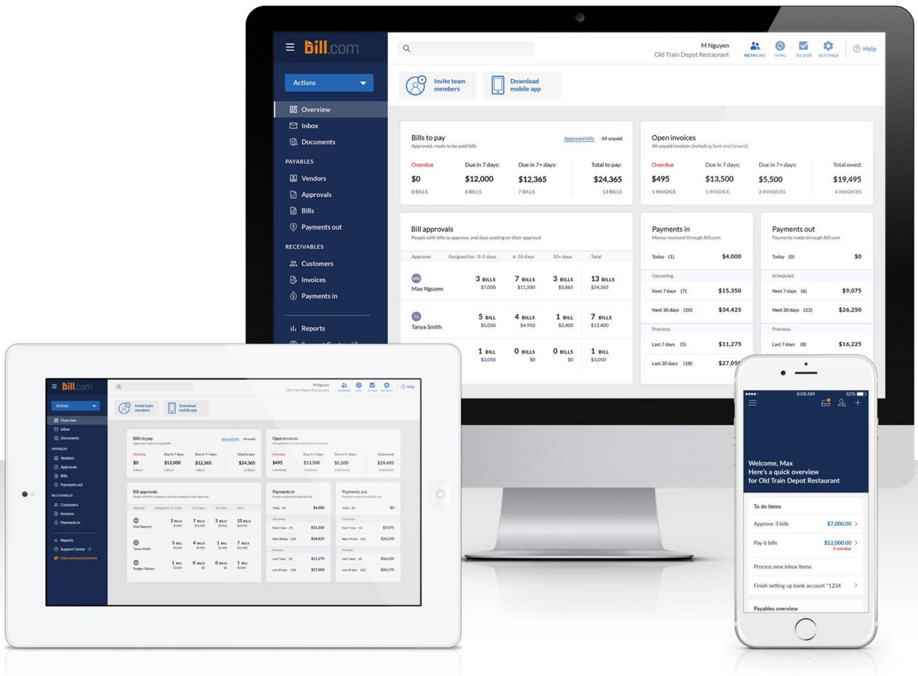
Designed with your privacy and security in mind

- Enable easy and secure access for your clients from any device or location with 2-step verification.
- Keep all bank account information private from vendors by making digital payments through your Bill.com account.

Built to work with your software*

intuit quickbooks | xero | sage Intacct | ORACLE NETSUITE | Microsoft

Manage payments anytime, anywhere from one integrated payments platform



Meet the complex requirements of family offices and high-net-worth individuals

Designed with your client's security and privacy in mind

Data in transit is encrypted using industry-standard Transport Layer Security (TLS) to protect your client's information, giving you peace of mind.

See everything from one dashboard

Quickly view your outstanding to-do lists and get one-click access to every one of your client accounts.

Easy setup and training to get you up and running fast

Bill.com offers white-glove setup and training for your staff and clients to get started quickly and confidently.

Your payments partner.
Used and trusted by the best.

OVER 80%
OF THE TOP-100
U.S. ACCOUNTING FIRMS

PARTNER
TO LEADING
U.S. FINANCIAL
INSTITUTIONS

CLOSE TO
$100B
MOVED
ANNUALLY

MILLIONS
PAYING &
GETTING PAID

FRIEDMAN+HUEY

"Bill.com's secure platform allows us to centralize all our family office billing activities with easy approval, pay, and audit trail capabilities so we can handle bill pay from any client, anywhere on the globe."

– **BOB JACOBSON,** PARTNER
FRIEDMAN & HUEY ASSOCIATES, LLP

Start delivering more value to your clients today

To speak with our experts or schedule a demo, visit us at
bill.com/wealth-management

bill.com

* Bill.com integrates with QuickBooks Online, Desktop, and Enterprise, Xero, Sage Intacct, Oracle NetSuite, Microsoft Dynamics GP, and Microsoft Dynamics 365 Business Central.

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