Bill.com Wealth Management and Family Office Solution Feature List

Bill.com is a Leader in Financial Process Automation

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

LEADING
U.S. FINANCIAL INSTITUTIONS

>$100B
PROCESSED ANNUALLY

MILLIONS
PAYING & GETTING PAID

Partners

Today's AP Process is Inefficient

Manual work creates inefficiency and increases risk to your high-net-worth (HNW) clients

ENTER

Bills, contracts, and other documents flood in via US mail or email

HNW clients don't have time to deal with a paper-intense process

Tedious data entry into accounting system for you

Paper-intensive

APPROVE

Email

Messy approval chain

Clients are hard to reach, approval delays

Mail

Gather approvals

Manual

PAY

Enter payments into online banking; re-enter into accounting system

Print checks; sign, stuff, and send

Fraught with Risk

RECONCILE

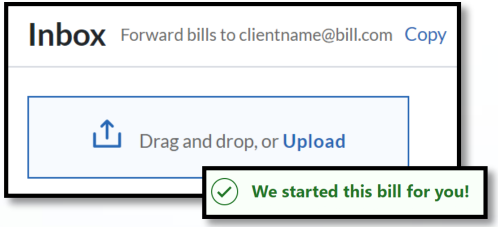
Accounting System vs Bank Accounts

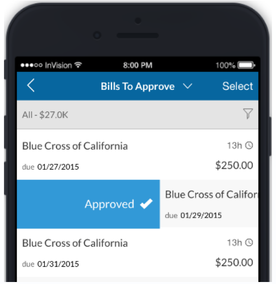
Reconcile bank accounts with accounting system; time-consuming exceptions

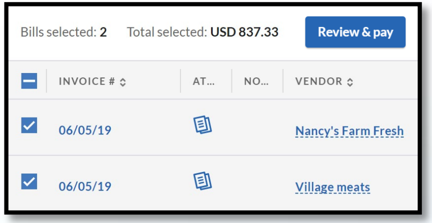
Audits burdened with buried documents and incomplete audit trails

Time-consuming

Bill.com Creates AP Efficiency with 4 Simple Steps







intuit quickbooks
xero
ORACLE NETSUITE
sage Intacct

Capture

- Send invoices directly to each specific entity's inbox.
- Let IVA code the bill for you.

Approve

- View and approve bills from anywhere, on any device.
- Custom approval workflows.

Pay

- All of your domestic and international payments on one platform.

Sync

- Let Bill.com automatically sync all of this to your accounting software.
- Time-stamped audit trails.

✓ ***Paperless*** ✓ ***Automated*** ✓ ***Secure*** ✓ ***Efficient***

Wealth Management / Family Office Feature List

PROGRAM BENEFITS	Essential	Premium	Elite
Client Management Console	✓	✓	✓
Custom Approval Workflows & Roles	✓	✓	✓
Unlimited Document Storage	✓	✓	✓
Check, ACH, International Wire & Virtual Card Payment Options***	✓	✓	✓
Sync with Quickbooks, Xero, Sage Intacct, & Oracle NetSuite	✓	✓	✓
Customer Support and Training	✓	✓	✓
Pre-approved Accelerated Payments*	✓	✓	✓
Premium Customer Support Access **		✓	✓
Premium Onboarding Setup and Ongoing Training**		✓	✓
API Access			✓

*Pre-approval is at Bill.com's sole discretion and is a requirement for pricing bundle offers

**Premium support bundle includes up to 20 admins (for firm inquiries only, not clients)

***International wires intended for business payments or payments made by business entities

For more information
(schedule a demo or try it risk-free):
https://www.bill.com/wealth-management