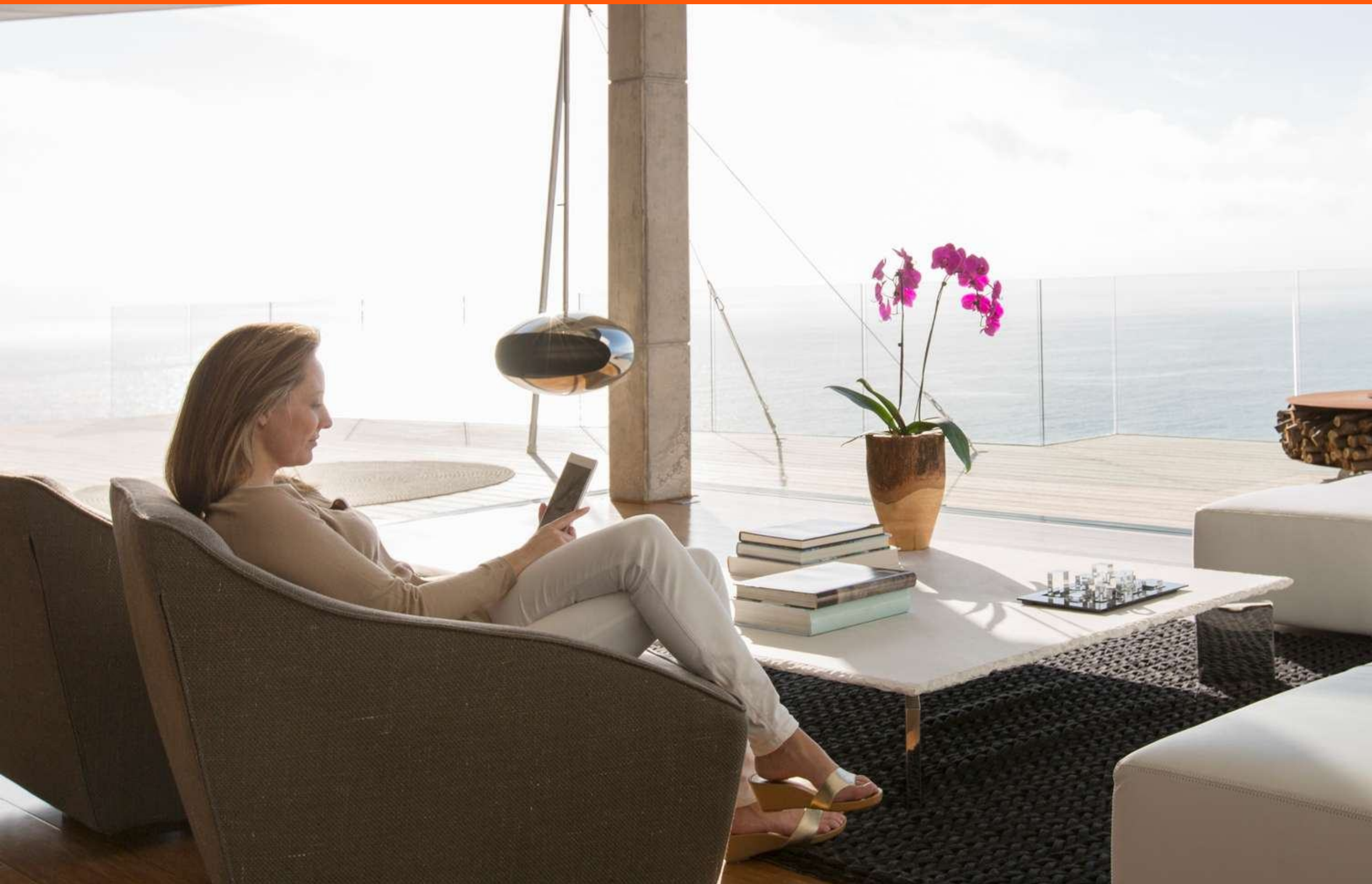




Family office and wealth management firms



Manage your clients' bill pay with greater confidence

Pay your clients' bills quickly and efficiently, with less manual effort and lower risk, on a platform designed with privacy and security in mind.

Automate and standardize your bill pay process

With data capture, approvals, and payments you can be sure of.



Efficient end-to-end bill pay workflows

- ✓ Save 50% of time managing your clients' bill pay¹ with auto-entry technology, easy bill routing and review, and your pre-determined approval workflows—without handwritten signatures
- ✓ Speed up account reconciliation by integrating your accounting system with BILL

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

- ✓ Get more payment flexibility with options that include ACH, automated checks, credit cards, 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

- ✓ Provide easy, 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 account

Built to work with your software²

 **intuit**
quickbooks



sage Intacct

ORACLE
NETSUITE

 **Microsoft**



Peace of mind. For you, and for them.

Meet the complex needs of family offices and high-net-worth clients with greater confidence.

Manage payments anytime, anywhere from one integrated platform



Designed with security in mind, for you and for your clients

Data in transit is encrypted using industry-standard Transport Layer Security (TLS) to protect your clients' information



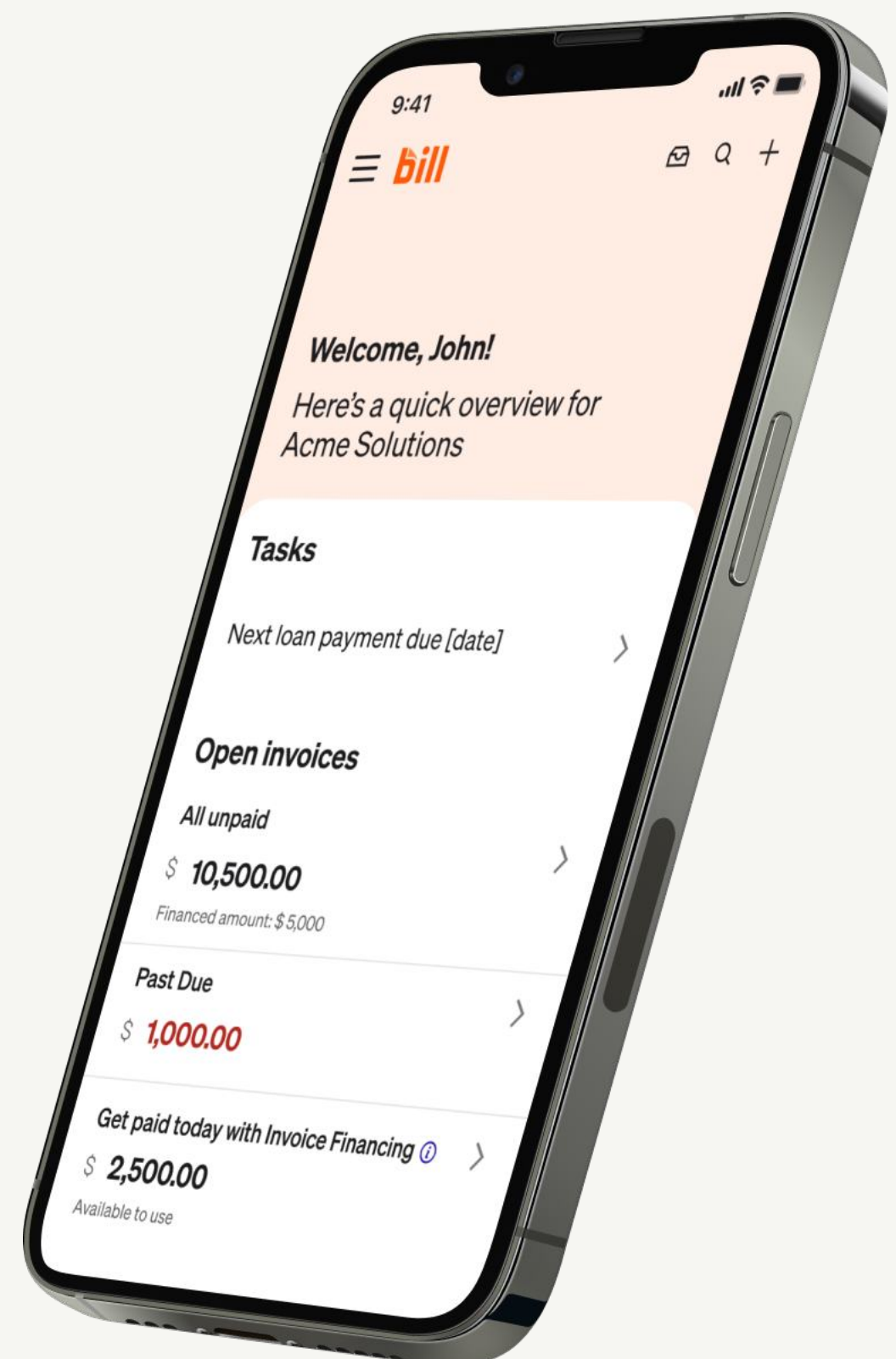
See everything from one dashboard

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 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 US
accounting firms
partner with BILL³

Partner

to leading US financial
institutions

\$225B+

total payment
volume processed³

4.7M

network members pay
or get paid with BILL³

“BILL’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

¹ Based on a 2021 survey of over 500 Accounting Firm partners.

² BILL integrates with QuickBooks Online, Desktop, and Enterprise, Xero, Sage Intacct, Oracle NetSuite, Microsoft Dynamics GP, and Microsoft Dynamics 365 Business Central.

³ As of June, 2022.