

bill

WEALTH MANAGEMENT

Deepen client relationships with BILL





For multi-family offices serving high-net-worth and ultra-high-net-worth families, client relationships are the foundation of the business.

Investment performance matters. Strategic guidance matters. But so does how money moves every day.

When handled securely and transparently, bill pay becomes more than an operational task, it becomes a daily demonstration of reliability and trust. BILL helps family offices deliver that experience.

Why bill pay matters more than ever

High-net-worth families often manage complex financial lives spanning multiple entities, properties, and family members.

Their financial structures may include:

- Multiple trusts and LLCs
- Family foundations
- Operating businesses
- Private staff payroll
- Real estate across states or countries
- Family members with different oversight preferences

Managing these moving parts requires precision and discretion. Yet many firms still rely on manual processes that are time-consuming, difficult to scale, and vulnerable to errors.

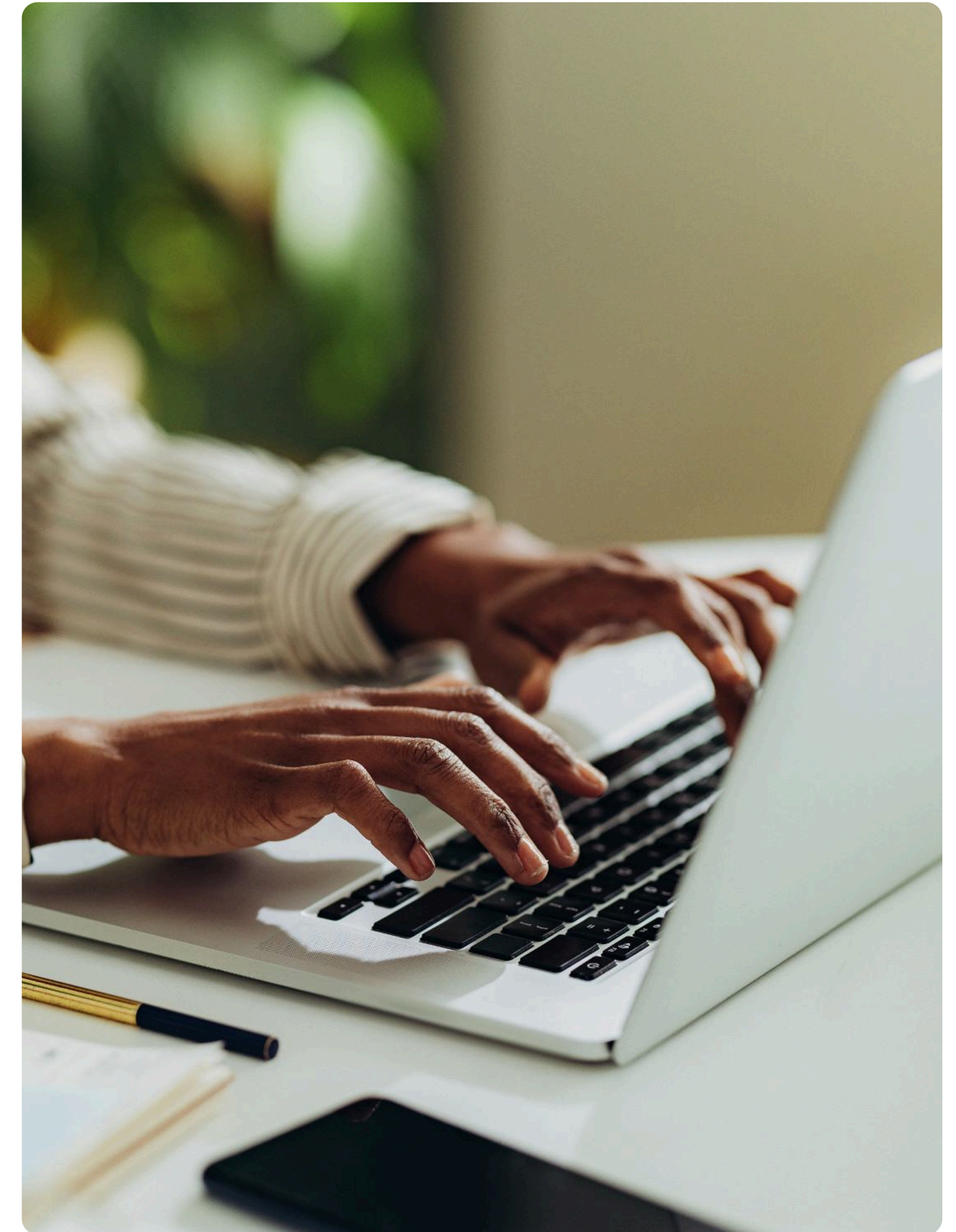
The opportunity for family offices

A modern bill pay solution is more than an operational upgrade, it strengthens the client relationship.

When your firm manages how a family's money moves day to day:

- You become embedded in their financial life
- Clients rely on you for more than investment advice
- Administrative friction decreases
- Advisors gain more time for strategic conversations

With the right platform, bill pay services can scale without scaling headcount—allowing your team to focus on high-value advisory work instead of manual processing.



How BILL helps you deliver more

BILL helps advisory firms and family offices manage bill pay across multiple clients and entities, from one secure platform.

Its capabilities support the qualities UHNW families value most: trust, transparency, and control.



01

Build trust through control and accountability

- ✓ Create customizable approval workflows
- 👤 Define who can initiate, review, and approve payments
- 📄 Maintain clear approval records and audit trails
- 👤 Adjust permissions as relationships evolve

Clients can approve every transaction or delegate entirely, all while maintaining visibility and control.

Confidence that reinforces trust.

02

Provide up-to-date visibility

- 📄 Complete transaction history across entities
- 📄 Centralized documentation
- 📈 On-demand reporting
- 🔔 Custom alerts and notifications

Transparency that strengthens confidence in the advisor relationship.

03

Simplify multi-entity complexity

- 🔑 One login
- 👥 Multiple clients
- 🏢 Multiple entities per client
- 🏦 Bank-agnostic flexibility

Structure that allows advisors to manage complexity with confidence.

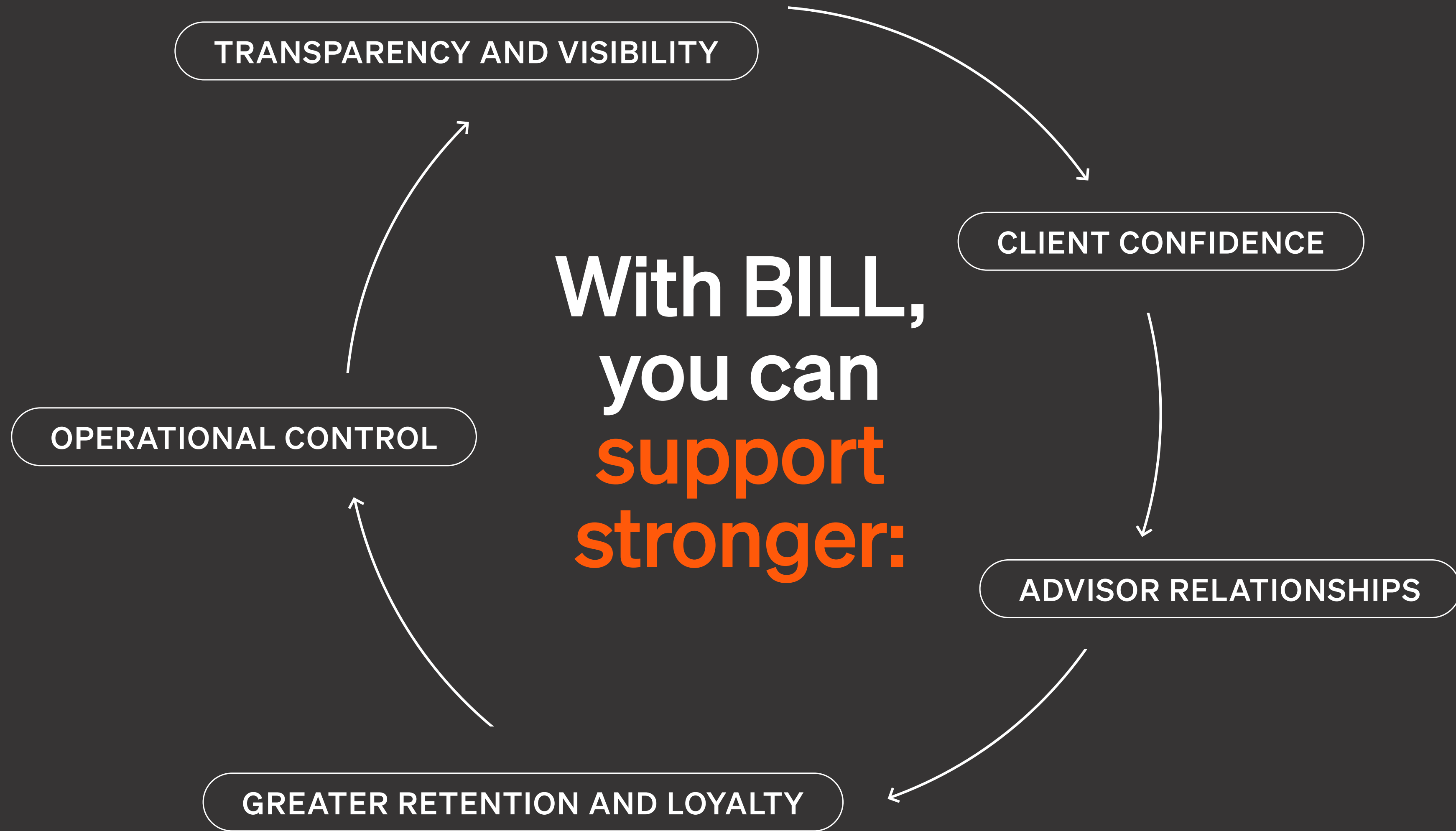
04

Increase operational efficiency

- 📄 Invoice capture
- 🔄 Approval routing
- 📅 Payment scheduling
- 📁 Documentation storage

More time for meaningful client engagement.





Relationships are the real asset

Families choose a family office based on trust, and they stay when that trust is reinforced consistently.

Well-executed bill pay demonstrates that your firm:

- Understands the complexity of their financial lives
- Protects their interests
- Manages details quietly and competently
- Is built to support them through life transitions and generational change

BILL helps family offices deliver that experience, with the security, transparency, and control clients expect.

Learn how BILL can support your family office.
Visit [BILL.com](https://www.bill.com) or speak with a BILL representative today.

