

Setting Up Your Financial Planning Payments

Step 1) Click the link you received in your welcome email.

Step 2) Set up your Password

You will come to this screen and be prompted to create a password.

AP AdvicePay

SET PASSWORD

Password *

Confirm Password *

I agree with [terms & conditions](#)

+ Register

Step 3) Click Make Payment

SDG | Financial Planning

TRANSACTIONS

- Payments

SETTINGS

- Account
- Your Wallet
- Log off

Review Payment

OPEN INVOICES

10 Search:

INVOICE NUMBER	FREQUENCY	DUE DATE	STATUS	AMOUNT	ACTIONS
#1030	Monthly	06/26/2018	Unpaid	\$250.00	Make Payment
#1029	Up-Front Payment		Unpaid	\$3,000.00	

Showing 1-1 of 1

Step 4) Choose Payment Option – 2 Options

Option 1) Link Bank Account

SDG Financial Planning

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Start Subscription

SUBSCRIPTION

INVOICE	START DATE	END DATE	DESCRIPTION	FREQUENCY	AMOUNT
#1030	06/26/2018		On-going financial planning services.	Monthly*	\$250.00
#1029			Initial Planning Fee	Single Payment*	\$3,000.00

Your subscription invoice will bill on 06/26/2018.

Your one-time invoice will bill immediately.

Payment Account *

New Account

Link Bank Account

+ Add Bank Account

Search for your bank and link it via your online credentials

Option 2) Manually add routing and account number

SDG Financial Planning

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Payment Account *

New Account

Link Bank Account

Add Bank Account

If you will be using your investment account to pay for the fees, I will provide the routing and account number for your TD Ameritrade account

If you are using your checking account, you can find the routing and account number on your checks.

Bobby Bankrate
123 Bankrate Boulevard
New York, NY 10001
555-555-5555

Date: _____

Pay to the order of: _____ \$ _____
dollars

Generic Bank and Trust

Memo _____

1111

123456789 **10987654321** **1111**
ROUTING NUMBER ACCOUNT NUMBER CHECK NUMBER