1. You'll receive an email like this:

| 2 | AP AdvicePay |
|------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|
| Welco | me to AdvicePay |
| Hi Frodo, | |
| Stark Financial uses AdviceF processor for financial planne manage your billing and payr | Pay for their payments. AdvicePay is a payment ers that allows you to securely pay them, and ment information. |
| | Setup your account |
| Reply to thi | Have a question? is email to contact Stark Financial |

2. After clicking on the "Setup your account" button, you'll see this to set your password and agree to the terms and conditions:

| ET PASSW | DRD | |
|----------|--------------|--|
| | | |
| Passwo | rd * | |
| ••••• | | |
| Confirm | n Password * | |
| | | |
| | | |

ADVICEPAY SETUP & PAYMENT INSTRUCTIONS

 Then this screen to review your invoice(s). You may have a single/upfront invoice or a subscription to approve or both:

| eview Payment | ÷ | | 2 ¹ - 31 | | |
|---------------|----------------|------------|---------------------|----------|----------------|
| OPEN INVOICES | | | | | |
| 10 \$ | | | | Se | arch: |
| | FREQUENCY | DUE DATE | STATUS II | AMOUNT | ACTIONS |
| #1038 | Single Payment | 03/22/2019 | Unpaid | \$800.00 | 🖽 Make Payment |
| #1037 | Monthly | 05/01/2019 | V-peid | \$250.00 | E Make Payment |

4. Click on the

appropriate "Make Payment" button and you'll see info about the invoice:

| Ionthly Subscription | \$250.0 |
|----------------------|------------|
| ionany outsienprion | 420010 |
| Monthly Fee | |
| Status: | • Inactive |
| Date created: | 03/22/2019 |
| Next Bill Date: | 05/01/2019 |
| | |
| | |

5. Clicking on the blue Make Payment button, you'll then be brought to the Payment Method

| | you'll be able |
|-------------------------------------------------------------------|-----------------|
| 1 Select Payment Method (2) Confirm Payment | to add your |
| | bank info by |
| | clicking on |
| Bank Account | the New Bank |
| Easily connect your bank account to make payments electronically. | account |
| · 한 322 전 전 전 일 | button. Banks |
| New bank account | 🖌 are available |
| | for automatic |
| | linking under |

page. Here

the '**Use Plaid'** option. To add your account this way, you will need your online banking login information. Some banks may ask you to take extra steps to verify your identity and will send you a verification number via text. If your bank isn't listed for quick linking, you forgot your online banking login info, or you'd like to add your account a different way, only checking account(s) – savings account not accepted - can be added by selecting **'Enter Details Manually'** and entering the account and routing number from a check!

ADVICEPAY SETUP & PAYMENT INSTRUCTIONS

6. After your banking payment method is set up, you can make a final review of the payment.

| Select Payment Method | 2 Confirm Payment |
|-----------------------|-------------------|
| Payment Details | View details |
| Total Due Today: | \$0.00 |
| Confirm Payment | |

7. The last step is clicking on the blue Confirm & Pay button to confirm and authorize the payment.

| I authorize AdvicePay to electronically debit my account and, if nece correct erroneous debits. | issary, electronically credit my account to |
|----------------------------------------------------------------------------------------------------|---------------------------------------------|
| ote: This payment may appear as Stripe Inc on your card or bank statement. | |
| | N |

After this last step you will receive a confirmation on screen and a separate confirmation email. Also

a successfully authorized invoice or subscription will display as active.

Note: if you view the video, it covers adding a credit card 5 : Monthly Subscription Active Showing 1-1 of 1 (1)

View all

instead of a bank account. At this time, EFP does not accept payments by credit card.

Current Subscriptions