

Ensure quality and compliance without the spreadsheets

"AdvicePay has helped significantly [with the flow for managing deliverables]. It's a one-stop shop where we have everything housed and can do reporting easily."

- AdvicePay Enterprise Customer

ADVICEPAY DELIVERABLES

Track open, past-due, and completed financial planning deliverables to validate quality and maintain compliance in your fee-for-service model.

Centralize financial plan oversight with agreements, payments, and deliverables all in the same system, you'll ensure nothing about your fee-for-service model slips through the cracks.

Create scalable, efficient workflows to empower your team every step of the way with multiple deliverable types, automatic due dates, reminders and alerts, and real-time approvals.

Avoid regulatory fines by being able to easily provide validation to regulators that the financial plan was delivered in alignment with the fees charged.

[Watch Deliverables in Action](#)

KEY FEATURES



Reviewer Role

Streamline oversight by designating users who can review deliverables and their supporting documentation in one place.



Bulk Submit

Reduce time spent meeting compliance requirements by allowing advisors to save incremental progress on deliverables and bulk submit deliverables for review.



Attestations

Support compliance efforts by collecting digital attestations from advisors and reviewers to verify that the firm's processes were followed.