

Using Bill Pay in Wealthscape Investor

Once your account is enrolled in the Cash Management feature offered by National Financial Services (NFS), you'll have the ability to pay bills using Wealthscape Investor.

Notes:

- Enrollment in the Cash Management feature through NFS is required to access Bill Pay.
- A valid email address must be listed in your Wealthscape Investor account profile before enrolling in Bill Pay.
- Bill Pay is not available for foreign or retirement accounts.

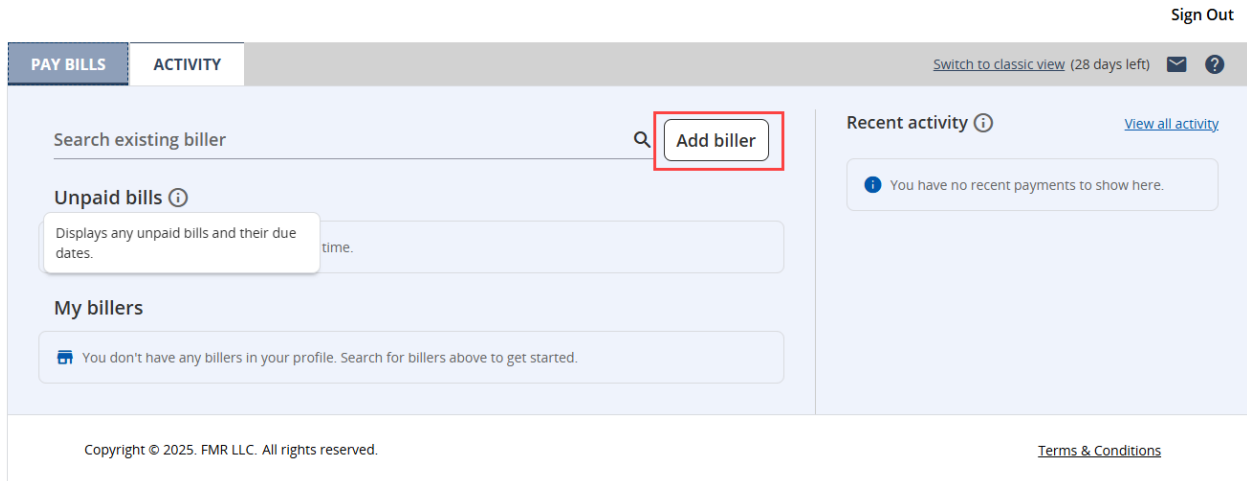
[Add Biller](#) | [Pay Bill](#)

Add Billers

1. In Wealthscape Investor choose the account you enrolled in Cash Management for Bill Pay.
2. Navigate to **Cash Management > Bill Pay**.
3. Select **Launch Bill Pay**.

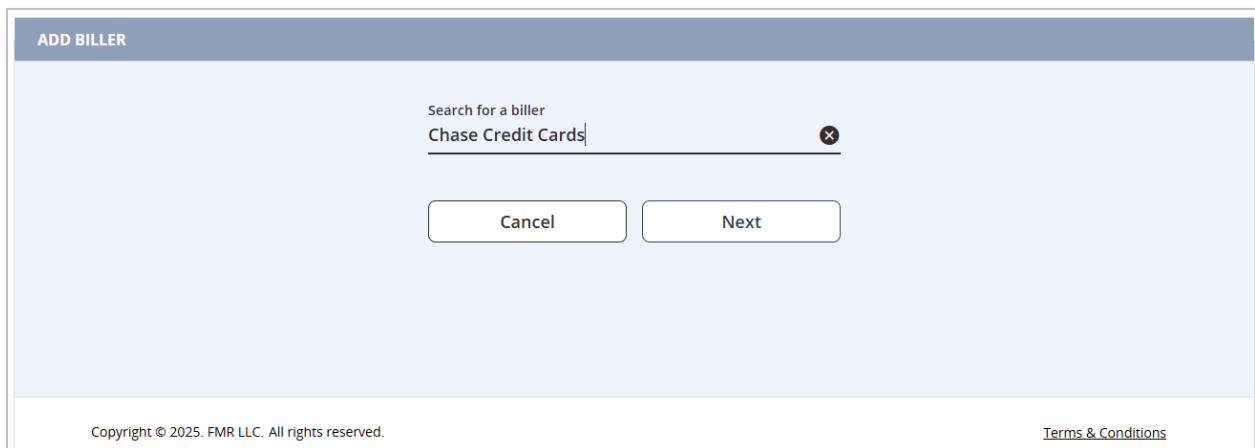
The screenshot displays the Wealthscape Investor interface. On the left sidebar, the 'Taxes' account is highlighted with a red box. The main content area shows the 'Cash Management' section, also highlighted with a red box. Within this section, the 'Bill Pay' subsection is visible, and the 'Launch Bill Pay' button is highlighted with a red box. The interface includes various account details, such as portfolio value, investment accounts, and checking/electronic funds transfer (EFT) information.

4. A warning will appear before you leave the NFS Wealthscape Investor site. Select **Continue**.
5. Depending on if you're accessing Bill Pay for the first time or not, you may be presented with a screen to select **Get Started** or you may be presented with a screen that lists the new features of Bill Pay, where you can select **Continue**.
6. Select **Add Biller**.



7. Search for biller and select the biller from the search results.

Note: If the biller does not appear in the search results the following screens allow you to add company/person information.

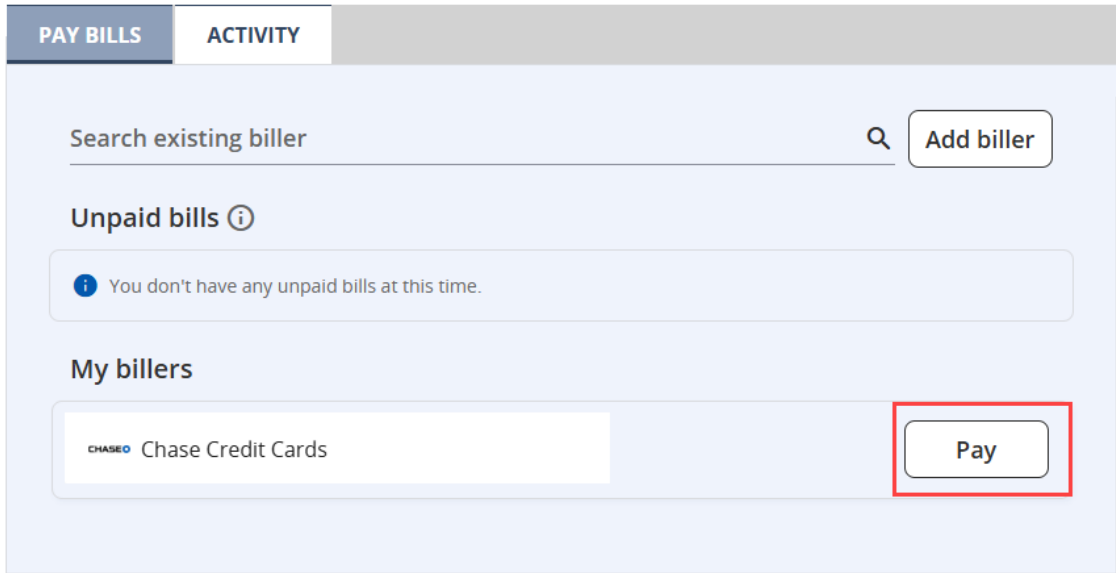


8. Click **Next**.
9. Add the account information.
10. Click **Add**.

After enrolling, you'll receive an email confirmation that the biller has been added. Bill Pay becomes available in Wealthscape Investor on the next business day.

Pay a bill

1. Select **Pay** next to the Biller.



PAY BILLS ACTIVITY

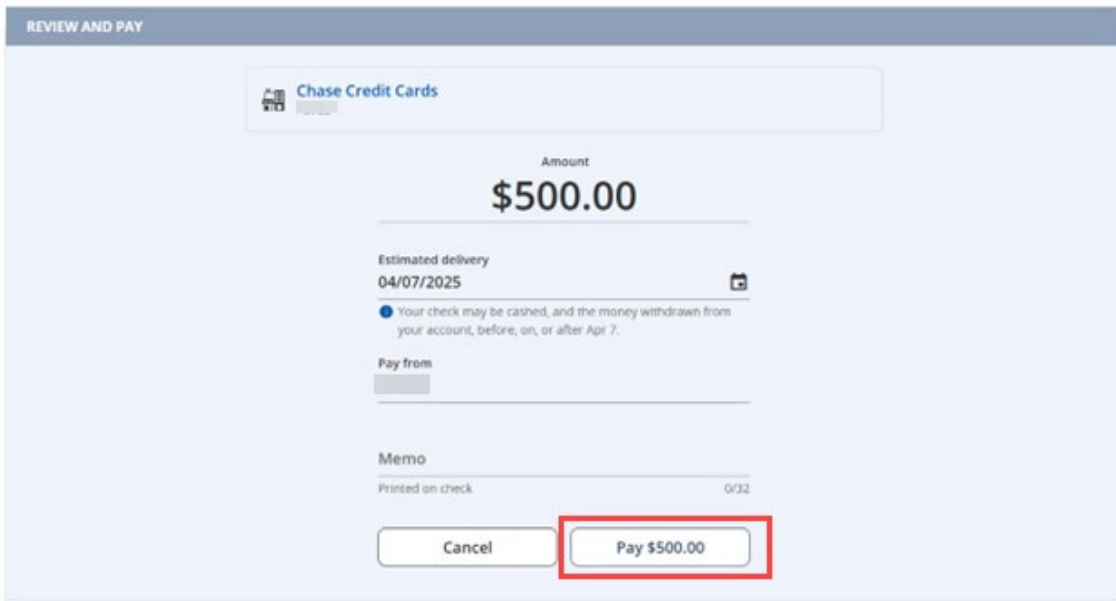
Search existing biller

Unpaid bills ⓘ

You don't have any unpaid bills at this time.

My billers

2. Enter the amount, review the “Delivered by” date, and review the “Pay from” account.
3. Select **Pay [amount]**.



REVIEW AND PAY

Amount
\$500.00

Estimated delivery
04/07/2025

Your check may be cashed, and the money withdrawn from your account, before, on, or after April 7.

Pay from

Memo
Printed on check 0/32

The Bill Pay Help Center tab provides many answers to common questions. You may also contact the BNY Customer Support at (877) 506-2399 for specific questions about your Bill Pay account.