



## Bill Pay App

The Plumb Bill Pay app provides an effective and highly secure method for bill payment.



“The Bill Pay App delivers an intuitive interface that offers anytime, anywhere access to bill pay and cash outflow statuses.

➔ Request a consultation

### About Plumb

Plumb Bill Pay is a high-touch, high-tech bill pay and accounting service provider with a proprietary Bill Pay app whose solutions are custom designed to meet the needs of high-net-worth (HNW) and ultra-high-net-worth (UHNW) clients.

We deliver financial peace of mind by assisting HNW individuals and family offices know where their money is going, so their trusted advisors can effectively manage it. Using advanced technology, a personalized touch, and decades of experience, we collaborate with our clients' advisors to deliver the highest quality of data and insights. This empowers them to take control of their wealth, laying the groundwork for successful financial planning.

### Bill Pay App

Plumb has enhanced its proprietary bill pay and reporting web application by introducing an innovative Onboarding Module. This improvement significantly boosts the accuracy and efficiency of our client onboarding processes, resulting in improved client service. For the Plumb team, this means that the onboarding process can be completed more quickly and accurately, thanks to a streamlined workflow that is aimed at unifying and tracking onboarding tasks, enforcing consistency, and reducing errors. We're able to focus on delivering exceptional support to our clients, while minimizing delays and inefficiencies.

#### Fact file

Website	www.plumbbillpay.com
Email address	sales@thinkplumb.com
Year founded	1996
HQ location	La Jolla, CA, United States
No. of employees	101-500
No. of clients	51-100
Geographic relevance	North America
Type of wealth manager served	Bank Wealth Managers, Family Offices, Financial Advisers

### Features

Our Bill Pay App features include:

**Comprehensive dashboard:** The onboarding module allows clients to input onboarding-related data directly into the application, further streamlining the process. An easy-to-navigate wizard takes them through each step of the data gathering process, allowing them to save their progress and return at their convenience. Within the system, clients have visibility to all onboarding tasks at their fingertips. A checklist and progress indicator shows clients where they are in the onboarding process and their percentage toward completion.

**Streamlined approvals,** uploads, and access to bill details.

**Communicate** with the Plumb team without a hitch.

**The commitments module** allows you - or a trusted advisor - to view the projected cash outflow from recurring bills on the app. You can also drill down to see the details of each bill, including the specific entity, due date, payment status, and amount due.

**Seamless integration** with QuickBooks online. Use it personally or empower a trusted advisor. Your choice, always secure. This intuitive, efficient, and incredibly useful app is the logical - and necessary - evolution in our high-touch, high-tech service.

### Benefits

Our clients and their trusted advisors benefit from: easy and customizable bill approval process by entity; clear dashboard view of bills paid, bills pending approval, and total cash outflow; balance snapshot with alerts if funding is required; six-month projection of estimated cash flow based on commitments; “hot list” of most important bills to track; quick access to bill information, expense details, relevant attachments, and bill pay reports; easy communication with the Plumb team - from the app.

### Read more about Plumb

## Differentiators

What makes the Plumb Bill Pay app different? We have built an app designed expressly for use by HNWI clients and their advisors. Not only does the app provide seamless bill approvals, but it also provides these unique and useful features: a balance snapshot with alerts if funding is required; six-month projection of estimated cash flow based on commitments; a customized “hot list” of most important bills to track.

## Users

The Plumb Bill Pay app was designed to be used by busy HNW and UHNW Plumb clients and/or their trusted advisors. Whether they have one or multiple entities, this app will help streamline the bill pay process and provide instant clarity into the current and projected status of their bill pay accounts.

## Get in touch



**Anneke Stender**  
EVP, Plumb Bill Pay  
[anneke@thinkplumb.com](mailto:anneke@thinkplumb.com)



## Read more on The Wealth Mosaic

## Use cases

A business owner and entrepreneur in his mid-50's is an early adopter of all new technologies. His extremely busy life makes him keen to find efficiencies wherever possible. He uses the Plumb Bill Pay app exactly as it was designed for – to provide fast and secure access to his daily financial management tools and reports so that he can focus on the parts of his life he loves.

## Installation and deployment

Our clients have the option of using either our web or convenient mobile applications to view and approve their bills and payments. The web version is hosted in the cloud and does not require any local installation and our mobile applications can be easily installed from the Apple App or Google Play stores. When Plumb pushes updates to the application, they are automatically updated for clients in real-time.

“The Bill Pay app includes integrations with financial institutions and accounting software packages to provide our clients with a unified view of their financial data.

➤ Request a consultation

## Technology and architecture

The Plumb Bill Pay app is built using the latest web technologies including ReactJS, Python, and Django as well as native apps built for both iOS and Android. New versions are released every two weeks and applications are hosted in the AWS Cloud and optimized for maximum performance and uptime. We regularly perform security audits and penetration testing from leading cyber security firms to ensure bank-level security of client data.

## Partners and integrations

The Bill Pay app includes integrations with financial institutions and accounting software packages to provide our clients with a unified view of their financial data. We currently feature a full integration with QuickBooks Online and are building connections to Sage Intacct and other leading accounting platforms. Our next generation data warehouse will be able to import data from multiple banks and investment portfolios enabling us to perform detailed analysis, forecasting, and data science.

