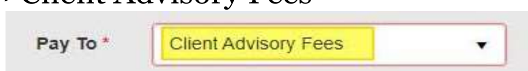
Foster Financial
Holistic Financial Planning

ACH Fee payments to Harbour from clients

1. Go to Harbour website (www.harbourinv.com) ⟶ under CLIENTS click Helpful Links

(https://harbourinv.com/clients/helpful-links/ - link directly to webpage)

2. Scroll down to bottom of page and click on Smart Pay Express for ACH Payments
   a. **For a One-Time payment** ⟶ click Pay Now
      i. Pay To ⟶ Client Advisory Fees



      ii. Payment description ⟶ Financial Planning Fee

      iii. Address ⟶ Client Address
   b. **To set up recurring payments** ⟶ click Create Account
      i. Complete information and you will be sent an e-mail from Madisonclientservices@firstbusiness.com with a temporary password. Go back to the log in screen and use your e-mail address and the temporary password to log in.
      ii. Once you log back in, follow the prompts to Make a payment.
         1. Pay to ⟶ Client Advisory Fees
         2. Payment Description ⟶ Advisory Fee, Financial Planning Fee……

3. After you have entered the payment information click continue to review the information and ACH authorization Agreement.

4. Click Agree & Submit and the next screen will be a transaction receipt. The client will have the option to "save receipt" or "print receipt" for their records.

The client will receive an e-mail from donotreply@harbourinv.com confirming the payment that was processed.

The transaction will show up in the client bank account as: "Harbour Investments WEB PMTS VVW *Client Name*".