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)

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



* + 1. Payment [description → Financial Planning Fee](https://harbourinv.com/clients/helpful-links/)
    2. Address → Client Address
  1. **To set up recurring payments** → click Create Account
     1. Complete information and you will be sent an e-mail from [Madisonclientservices@firstbusiness.com](mailto: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.
     2. 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 donotr[eply@harbourinv.com confirm](mailto:donotreply@harbourinv.com)ing the payment that was processed.

The transaction will show up in the client bank account as: “Harbour Investments WEB PMTS VVW C*lient Name”*.