

Blue Trust E-Payment Disclosures

Blue Trust utilizes the services of iSolutions Payments, LLC ("iSolutions"), a third-party payment processor, to allow clients to make electronic payments for financial planning fees through the iSolutions iPayments platform. Please note that the [iSolutions privacy policy](#) will apply to confidential information which you store on the iPayments platform. Payments made using iPayments may be made either by the use of credit card or ACH. A 3% convenience fee will be added by iSolutions to all processed credit card transactions, however no additional fee will be added to ACH transactions.

Once you have entered your payment instructions into the iPayments platform, your financial planning fees will be automatically charged to your credit card or drafted from your bank account on a recurring basis around the 18th of each quarterly billing month (January, April, July, and October). You will receive a quarterly email notification reminding you to review your invoice in the Blue Trust client portal in advance of the payment draft. Entering your payment information into the iPayment platform is a one-time set up process and your payment details will be saved to your iSolutions profile, but will not be accessible by Blue Trust. Should you need to update or change your payment instructions, please email epayments@bluetrust.com and a new link will be sent to you allowing to make those changes.