



# Bill pay at your fingertips

Managing your finances has **never been easier**

Pay your bills in just a few easy steps, at your convenience, from anywhere in the world.

To learn how to enroll in and use the Bill Pay service, review the instructions below.

## Step 1: Enroll in UBS Online Services (OLS)

**You have two ways to register for online access to view your account information:**

1. Visit [ubs.com/onlineservices](https://ubs.com/onlineservices). Click on Register for Online Access to set up your account.
2. Download the UBS Wealth Management app (available for [iOS](#) and [Android](#)) on the [Apple App Store](#) or the [Google App Store](#). Click on Register for Online Access to set up your account.

## Step 2: Access the Bill Pay Service

### Desktop

Visit [ubs.com/ols](https://ubs.com/ols) and enter your username and password.  
Go to Banking Services > Pay Bills.

### Mobile Device

1. Open the UBS Wealth Management app.
2. Go to Banking Services > Pay Bills.

**Note:** If you don't have any accounts enrolled in Bill Pay, log in to UBS Online Services and select the gear icon on the top right-hand side of the screen, navigate to *Service and Features* and select *Payments and Transfers* to enroll. Once you have enrolled, please proceed with Step 2. To request or reset a PIN, call UBS Client Services at 800-762-1000 and begin transacting immediately.

### Step 3: Add a Payee

#### OLS

1. Select an account (if you have more than one account) and navigate to Manage Payees.
2. Go to Add Payee > Add External Payee and enter your account PIN or use biometric authentication, if required.
3. Type in the Payee Name to search for the Payee and click on the Payee that matches.
4. If there is no match, click on Add Payee manually. Type in the information required and click Add Payee.

#### Mobile Device

1. Select Manage Payee List > Account.
2. Select Add a Payee.
3. Type in Payee Name to search for the Payee and click on the Payee that matches.
4. If there is no match, click on Add a Custom Payee. Type in the information required and click submit. A PIN or biometric authentication may be required to add a Payee.

**Note:** Please allow 7 – 10 business days for delivery of physical checks. Electronic payments require two business days.

### Step 4: Pay bills

#### OLS

1. Click on Make a New Payment > Bill Payments.
2. Select the account you want to pay from and fill in the payment details.
3. Verify your payment and confirm that the payment is scheduled.

#### Mobile Device

1. Click on Make a Payment and select an account.
2. Select a Payee and fill in the payment details.
3. Verify your payment and tap Submit.

**Note:** Please allow 7 – 10 business days for delivery of physical checks. Electronic payments require two business days.

### Step 5: View Scheduled Payments

#### OLS

Click on the Scheduled Payments tab.

#### Mobile Device

Click on Manage Scheduled Payments.

**Note:** Review all information on Scheduled Payments here. Edit or skip/delete payments here as well.

### Step 6: View Payment History

#### OLS

Click on the Payment History tab to view previous payments.

#### Mobile Device

Click on Accounts and select activity. Filter within the app under activity to see payment history.

**Note: View** all payments from different time periods using the filters in the Payment History tab.

**For more information on UBS Online Services or the UBS Wealth Management app contact your Financial Advisor.**

Use of the UBS Wealth Management USA app are subject to terms and conditions. Other restrictions may also apply. Certain products, functionalities and services described herein or contained or otherwise made available via the app may not be available to all clients or in all jurisdictions.

The information you include in the app are for your personal use only. UBS will use your responses to personalize your digital experience but will not update client records unless you confirm the information with your Financial Advisor.

**About UBS Financial Services Inc.**

The Resource Management Account (RMA), Business Services Account BSA and International Resource Management Account (IRMA) are brokerage accounts with UBS Financial Services Inc., a registered broker-dealer and a Member of the Securities Investor Protection Corporation (SIPC), which protects securities customers of its members up to \$500,000 (including \$250,000 for claims for cash). An explanatory brochure is available upon request or at [sipc.org](http://sipc.org). These accounts provide access to cash management services through arrangements with affiliated banks and other third-party banks, and provide access to insurance and annuity products issued by unaffiliated third-party insurance companies through insurance agency subsidiaries of UBS Financial Services Inc. UBS Financial Services Inc. is not a bank.

**Investment, insurance and annuity products: Not FDIC insured • Not a deposit• No bank guarantee • May lose value**

**Important information about brokerage and advisory services.**

As a firm providing wealth management services to clients, UBS Financial Services Inc. offers investment advisory services in its capacity as an SEC-registered investment adviser and brokerage services in its capacity as an SEC-registered broker-dealer. Investment advisory services and brokerage services are separate and distinct, differ in material ways and are governed by different laws and separate arrangements. It is important that clients understand the ways in which we conduct business and that you carefully read the agreements and disclosures that we provide to you about the products or services we offer. For more information, please review the client relationship summary provided at [ubs.com/relationshipsummary](http://ubs.com/relationshipsummary), or ask your UBS Financial Advisor for a copy.

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