



paymints.io

# Client Transfer Instructions

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## Welcome to paymints.io

### PERSONAL INFORMATION

**First Name**


**Middle Name**

**Last Name**

 Must match your driver's license or government-issued ID.

### CONTACT INFORMATION

**Mobile Phone** We will send a security code to your mobile phone for account verification.

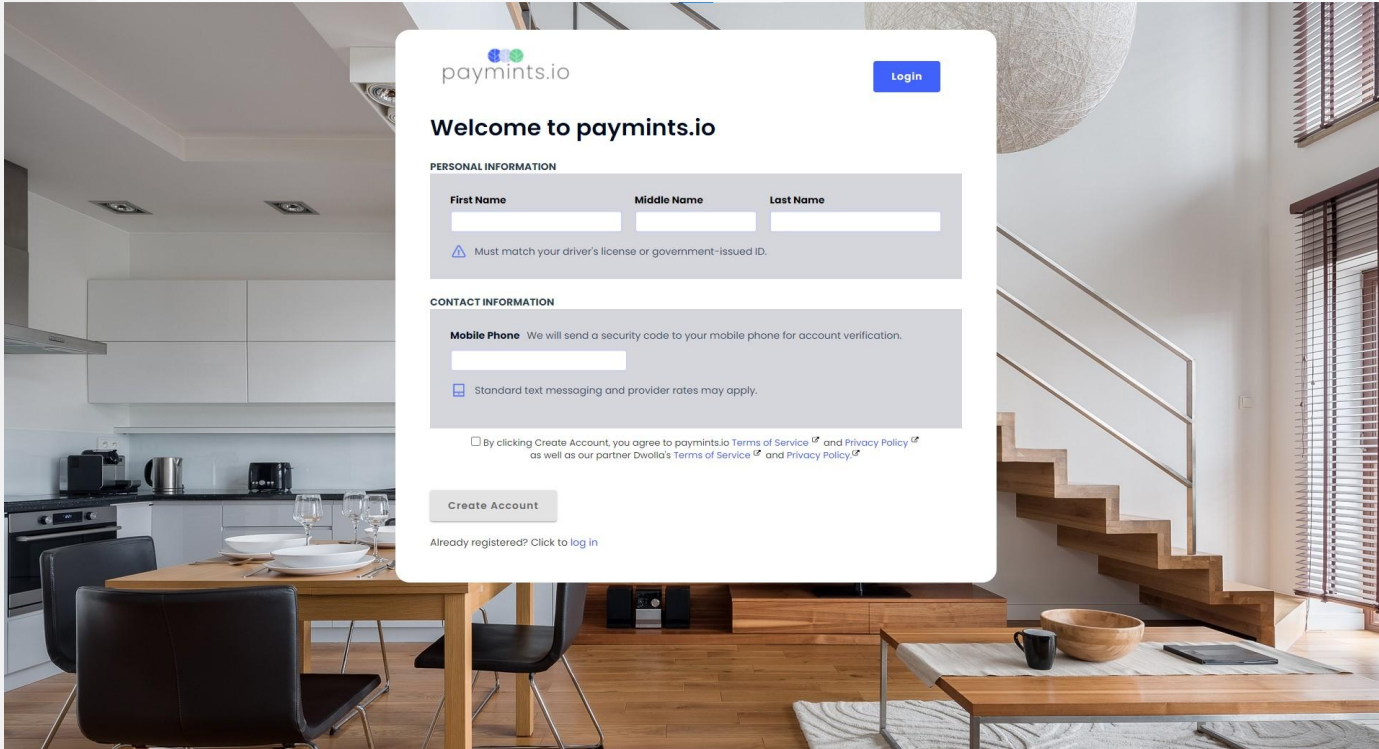
 Standard text messaging and provider rates may apply.

By clicking Create Account, you agree to paymints.io [Terms of Service](#) and [Privacy Policy](#) as well as our partner Dwolla's [Terms of Service](#) and [Privacy Policy](#).

[Create Account](#)

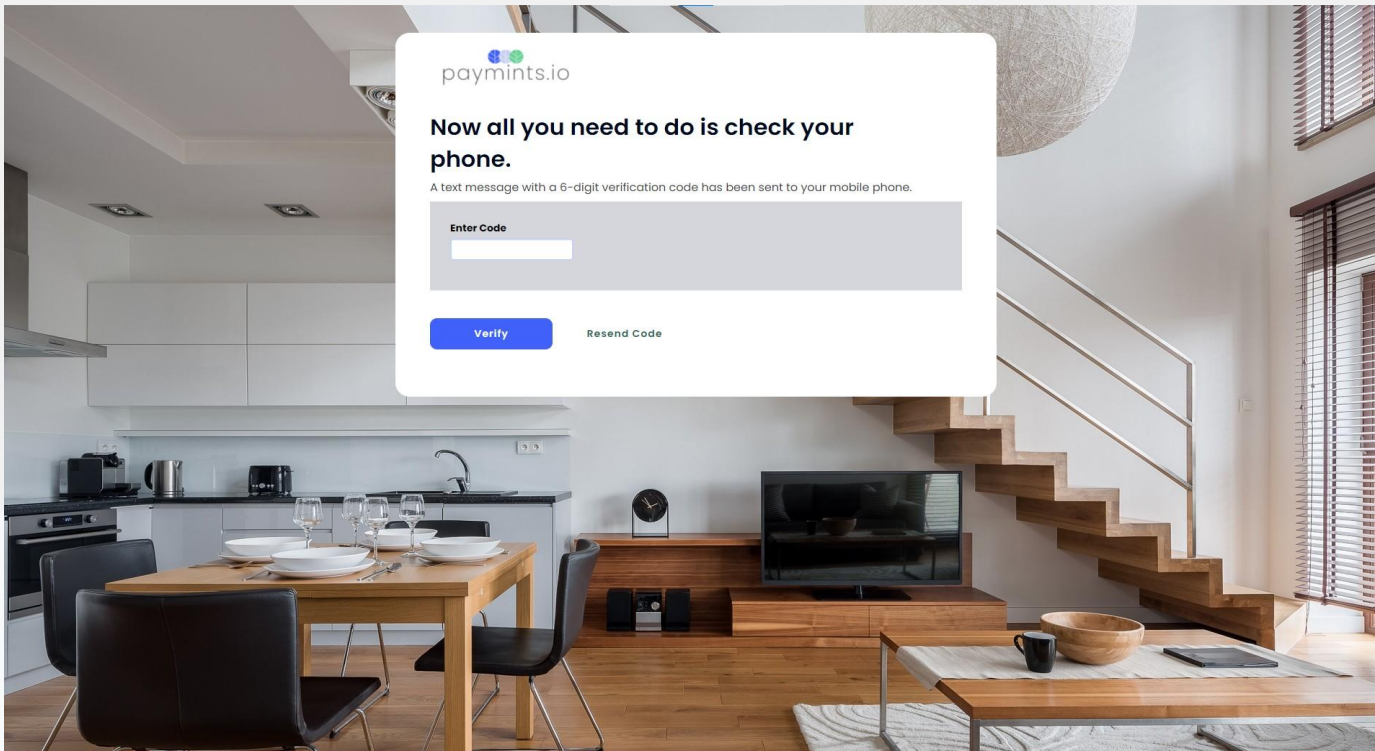
# 1

Start by going to <https://firstclasstitleagency.paymints.io>. Create an Account by inputting your first and last name and your mobile phone number. We will send you an authentication code via text.



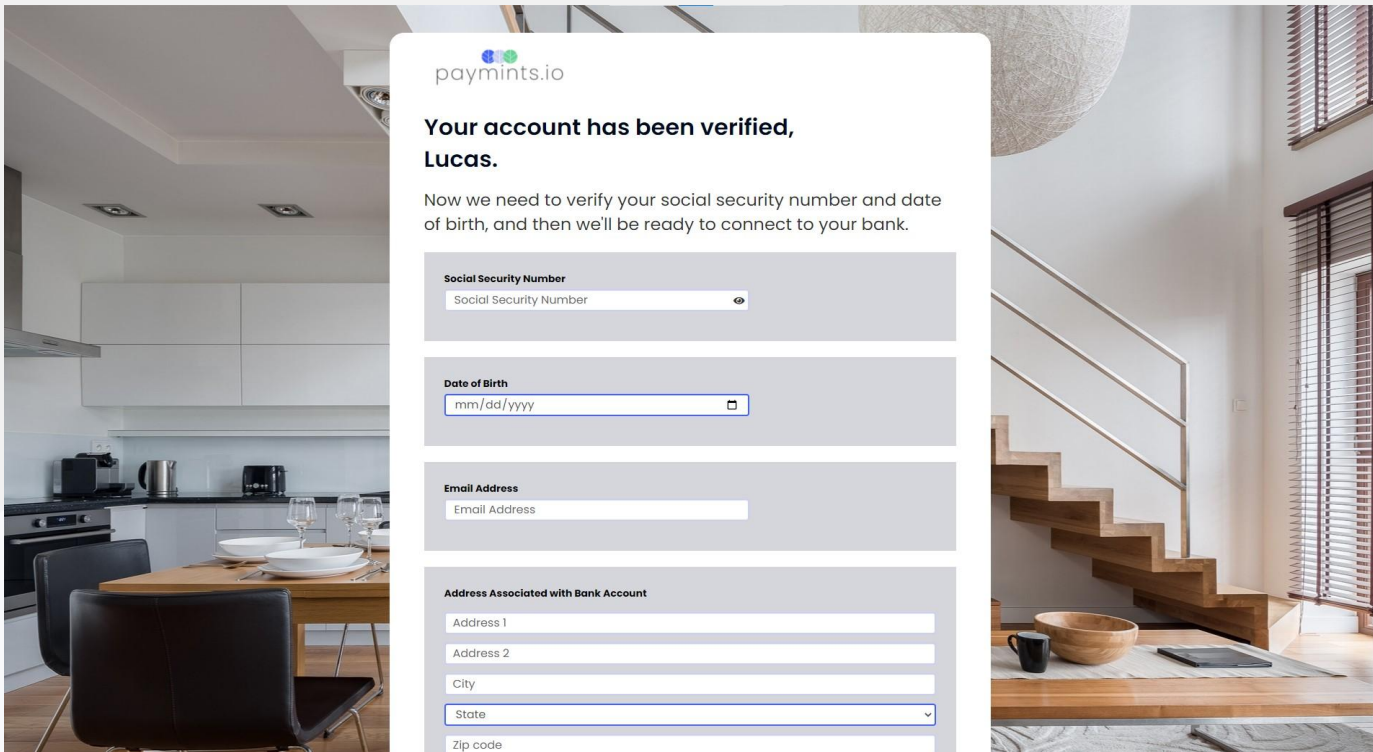
# 2

Enter the authentication code you should have received via text message.



# 3

Please input your personal information for bank compliance.



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**Your account has been verified, Lucas.**

Now we need to verify your social security number and date of birth, and then we'll be ready to connect to your bank.

**Social Security Number**  
Social Security Number

**Date of Birth**  
mm/dd/yyyy

**Email Address**  
Email Address

**Address Associated with Bank Account**

Address 1

Address 2

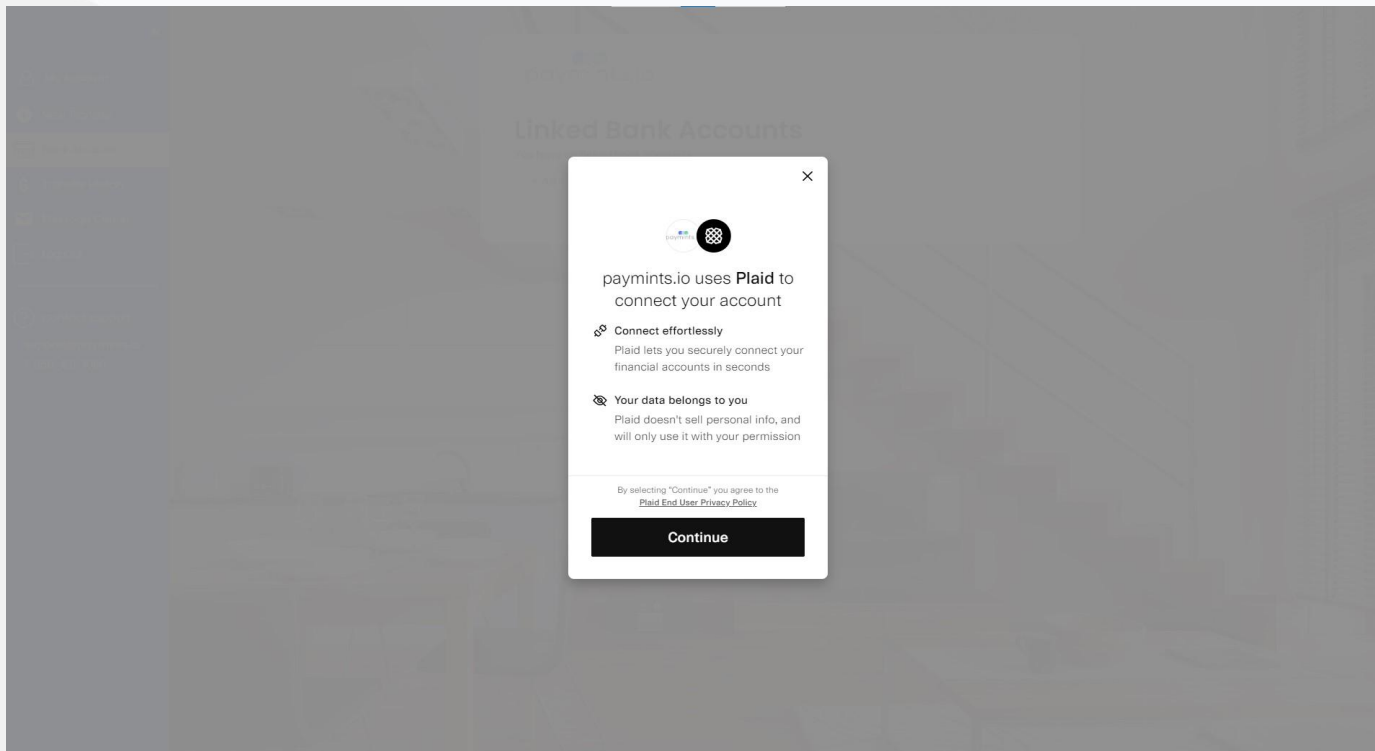
City

State

Zip code

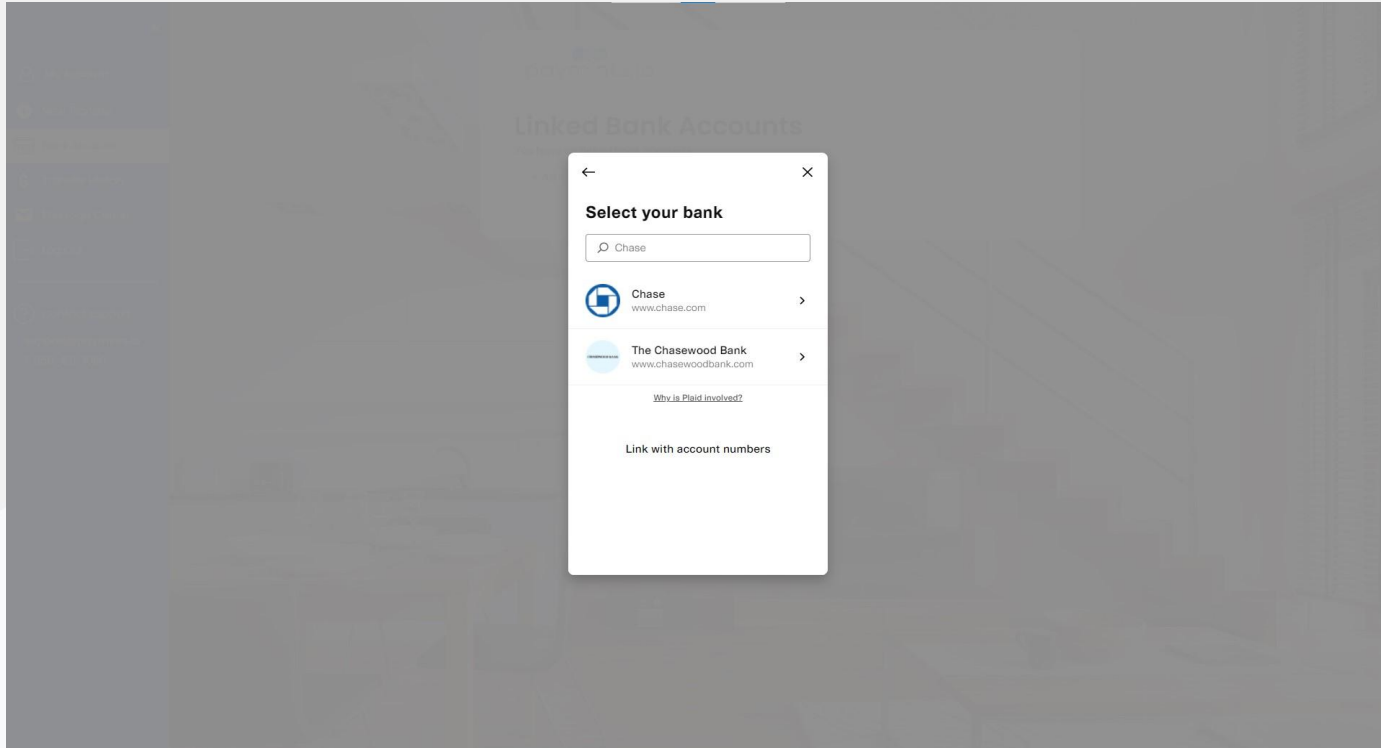
# 4

Next you will see the Plaid screen. Plaid is the most secure way to connect your bank account electronically. We do not share or store any banking credentials. Please click continue.



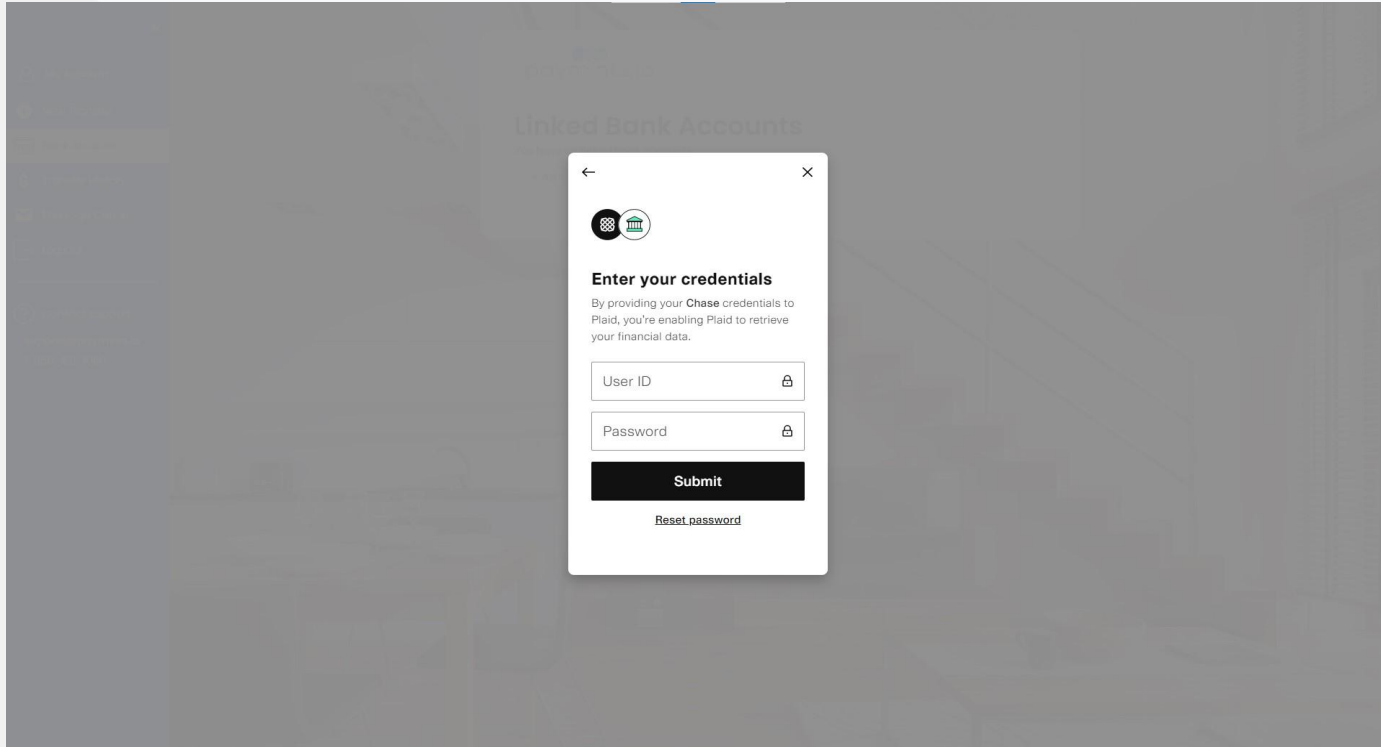
5

Plaid allows us to connect to over 16,000 financial institutions. What you will first see are the most banks used on our platform. If you do not see your bank click in the search bar and type in the name of your bank. Select your financial institution.



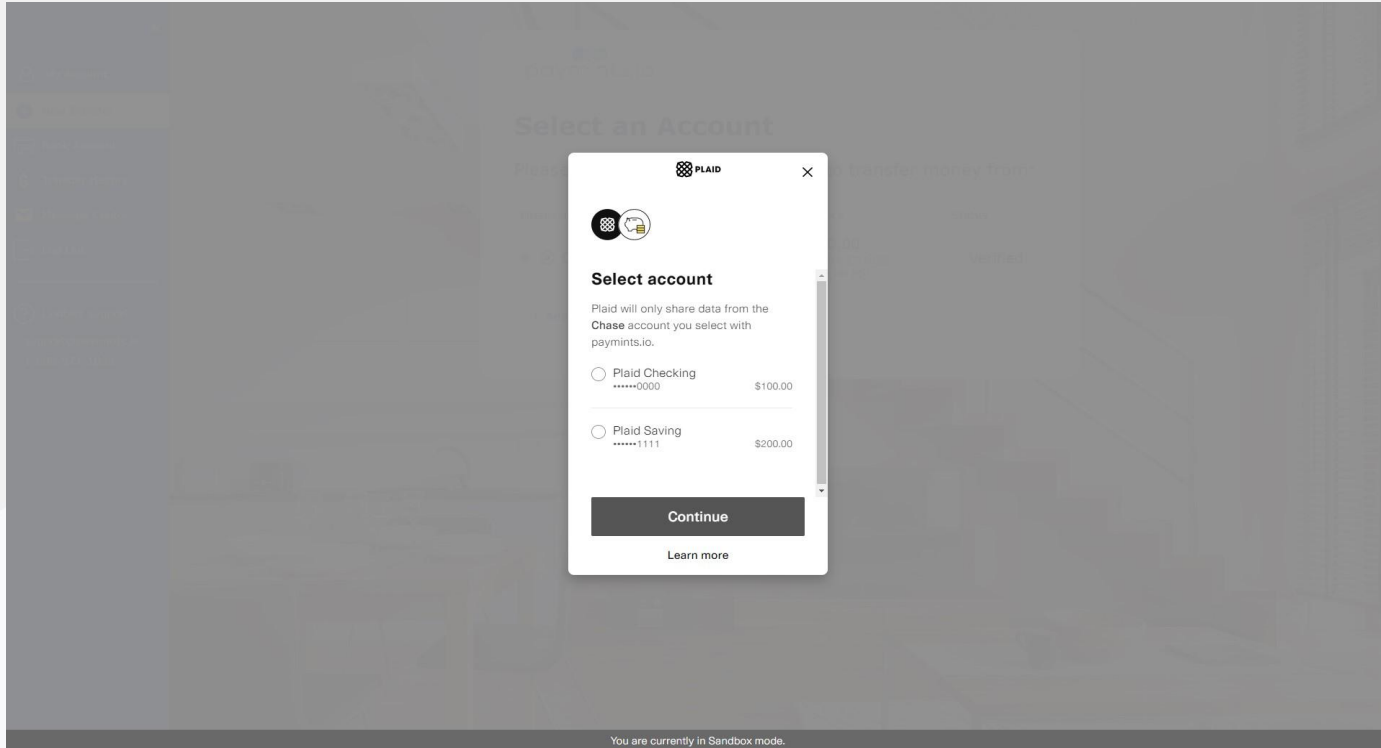
# 6

After you have selected your financial institution, log in to your bank using your online banking credentials. This will allow you to view all of your accounts which are eligible to make a transfer on our platform.



# 7

Please select the account that you would like to use to make the transfer.





# 8

Once your account has been selected please click "Continue".

The screenshot shows the paymints.io mobile application interface. On the left is a blue sidebar menu with the following items: My Account, New Transfer, Bank Account, Transfer History, Message Center, Log Out, and Contact support (with email support@paymints.io and phone number 1-888-921-1090). The main content area is a white modal titled "Select an Account" with the paymints.io logo at the top. Below the title, it says "Please select the account you want to transfer money from:". A table lists the available accounts:

Financial Institution	Account	Balance	Status
Chase	X0000	\$100.00 as of 04/27/2022 12:15 PM EDT	Verified

At the bottom of the modal, there is a "+ Add Account" link and a blue "Continue" button. The background of the app is a modern living room with a wooden dining table, a staircase, and a television.

9

Please fill out the transfer details page. If you would like to add any notes about your transfer you can add that in the optional notes section.

The screenshot shows the 'Transfer Details' page on the paymints.io mobile application. On the left is a blue navigation sidebar with the following items: 'My Account', 'New Transfer', 'Bank Account', 'Transfer History', 'Message Center', 'Log Out', and 'Contact support' (with email 'support@paymints.io' and phone '1-888-921-1090'). The main content area is white and contains the following elements:

- paymints.io logo
- Transfer Details** header
- Question: "What kind of transfer would you like to make?"
- Radio button options:
  - Earnest Money Deposit for Purchase
  - Cash to Close for Refinance
  - Other
- Text: "Please enter the property address and any optional notes:"
- Section: "Property Address Related To The Transfer" with input fields for:
  - 123 Street
  - Address 2
  - Charlotte
  - North Carolina (dropdown menu)
  - 28209
- Section: "Notes (Optional)" with a text input area.
- Text: "How much do you want to transfer?"

# 10

Review your transfer details and if all of the information is correct please click “Make Transfer”.

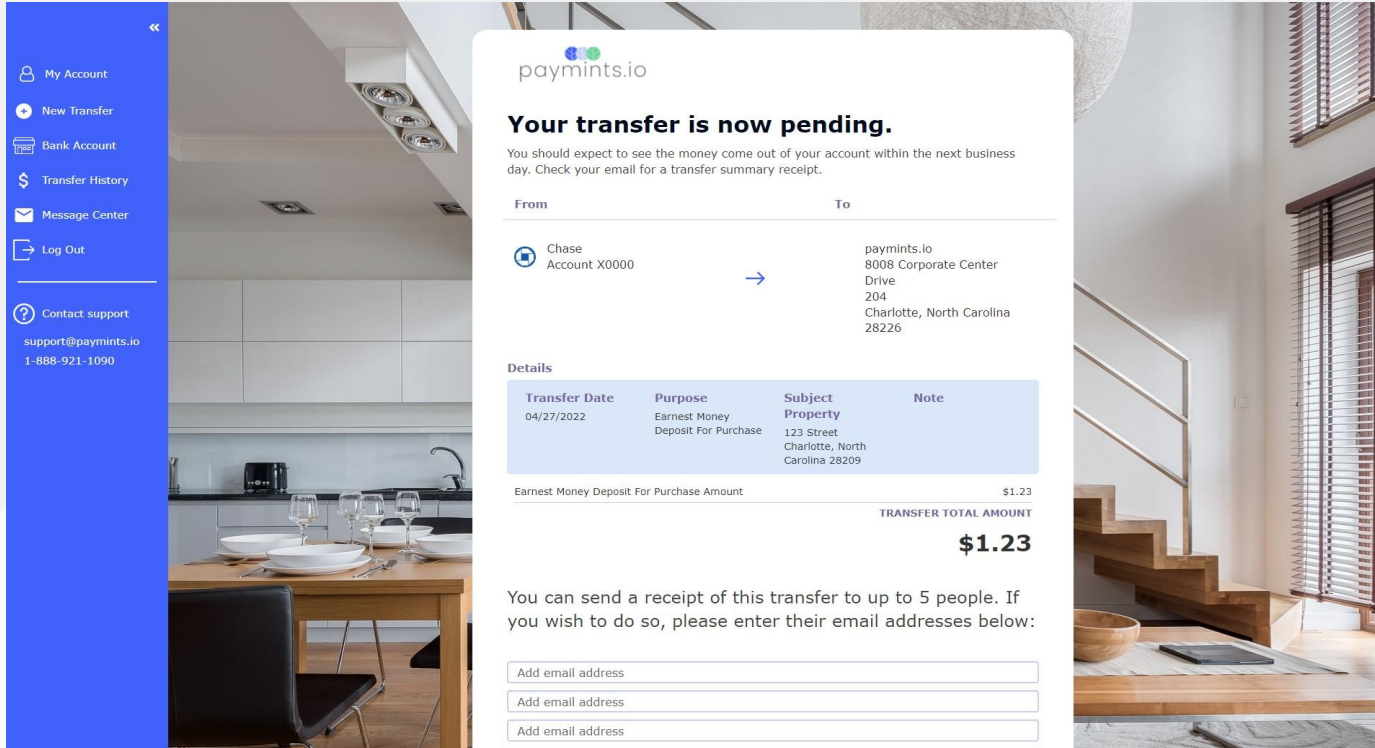
The screenshot shows the paymints.io mobile application interface. On the left is a blue navigation sidebar with the following options: My Account, New Transfer, Bank Account, Transfer History, Message Center, Log Out, and Contact support (with email support@paymints.io and phone number 1-888-921-1090). The main content area is a white card titled "Review" with the paymints.io logo at the top. Below the title, it says "Please confirm that the information below is correct before continuing." The card is divided into two columns: "Transfer From:" (Chase Account X0000) and "Transfer To:" (paymints.io, 8008 Corporate Center Drive, #204, Charlotte, North Carolina 28226). Below this is a "Details" section with a table:

Transfer Date	Purpose	Subject Property	Note
04/27/2022	Earnest Money Deposit For Purchase	123 Street Charlotte, North Carolina 28209	

Below the table, it shows "Earnest Money Deposit For Purchase Amount" as \$1.23. The total amount is displayed as "TRANSFER TOTAL AMOUNT" of **\$1.23**. At the bottom of the card are two buttons: "< Back" and "Make Transfer". The background of the app is a modern kitchen and dining area.

# 11


Once you have clicked “Make Transfer” both you and First Class Title Agency will receive email notifications that the transfer has been initiated. You will also receive an email notification when the transfer arrives in First Class Title Agency’s account. You can also add additional email recipients if you would like to send the transfer details to anyone else involved in the closing.



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### Your transfer is now pending.

You should expect to see the money come out of your account within the next business day. Check your email for a transfer summary receipt.

From	To
 Chase Account X0000	→ paymints.io 8008 Corporate Center Drive 204 Charlotte, North Carolina 28226

**Details**

Transfer Date	Purpose	Subject	Note
04/27/2022	Earnest Money Deposit For Purchase	Property 123 Street Charlotte, North Carolina 28209	

Earnest Money Deposit For Purchase Amount \$1.23

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**TRANSFER TOTAL AMOUNT**  
**\$1.23**

You can send a receipt of this transfer to up to 5 people. If you wish to do so, please enter their email addresses below:

# Contact Us

If you experience any issues, please contact [support@paymints.io](mailto:support@paymints.io)

Enjoyed your transfer experience?  
Please let us know & tell a friend!

