



paymints.io

# Client Transfer Instructions

Learn More



paymints.io [Login](#)


## 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.

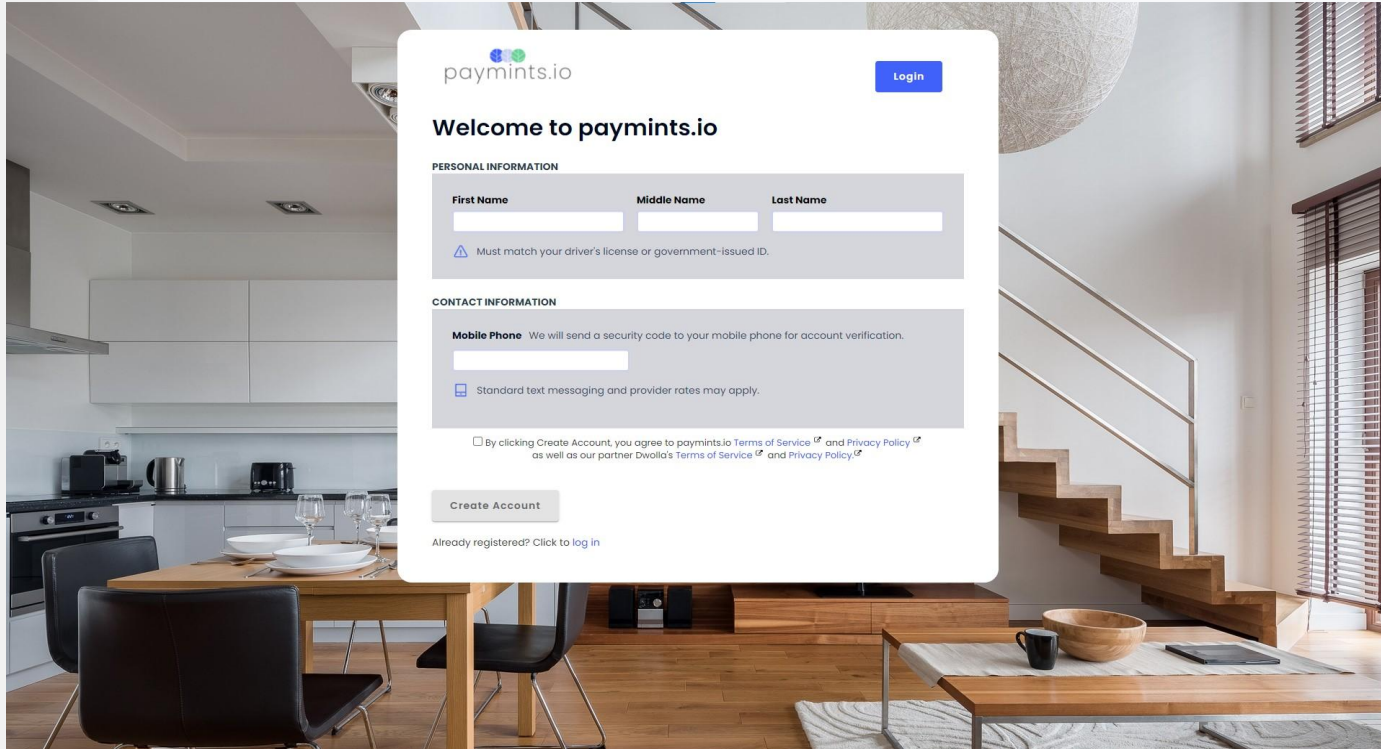
 Standard text messaging and provider rates may apply.

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://prtile.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.



The image shows a modern kitchen and living area in the background. In the foreground, a white form for creating an account is overlaid. The form has the paymints.io logo at the top left and a blue 'Login' button at the top right. Below the logo is the heading 'Welcome to paymints.io'. The form is divided into two main sections: 'PERSONAL INFORMATION' and 'CONTACT INFORMATION'. The 'PERSONAL INFORMATION' section has three input fields for 'First Name', 'Middle Name', and 'Last Name'. Below these fields is a warning icon and text: 'Must match your driver's license or government-issued ID.' The 'CONTACT INFORMATION' section has a 'Mobile Phone' input field with a note: 'We will send a security code to your mobile phone for account verification.' Below the phone field is a text message icon and text: 'Standard text messaging and provider rates may apply.' At the bottom of the form, there is a checkbox with the text: '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.' Below the checkbox is a grey 'Create Account' button. At the very bottom of the form, there is a link: 'Already registered? Click to log in'.

paymints.io [Login](#)

## 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.

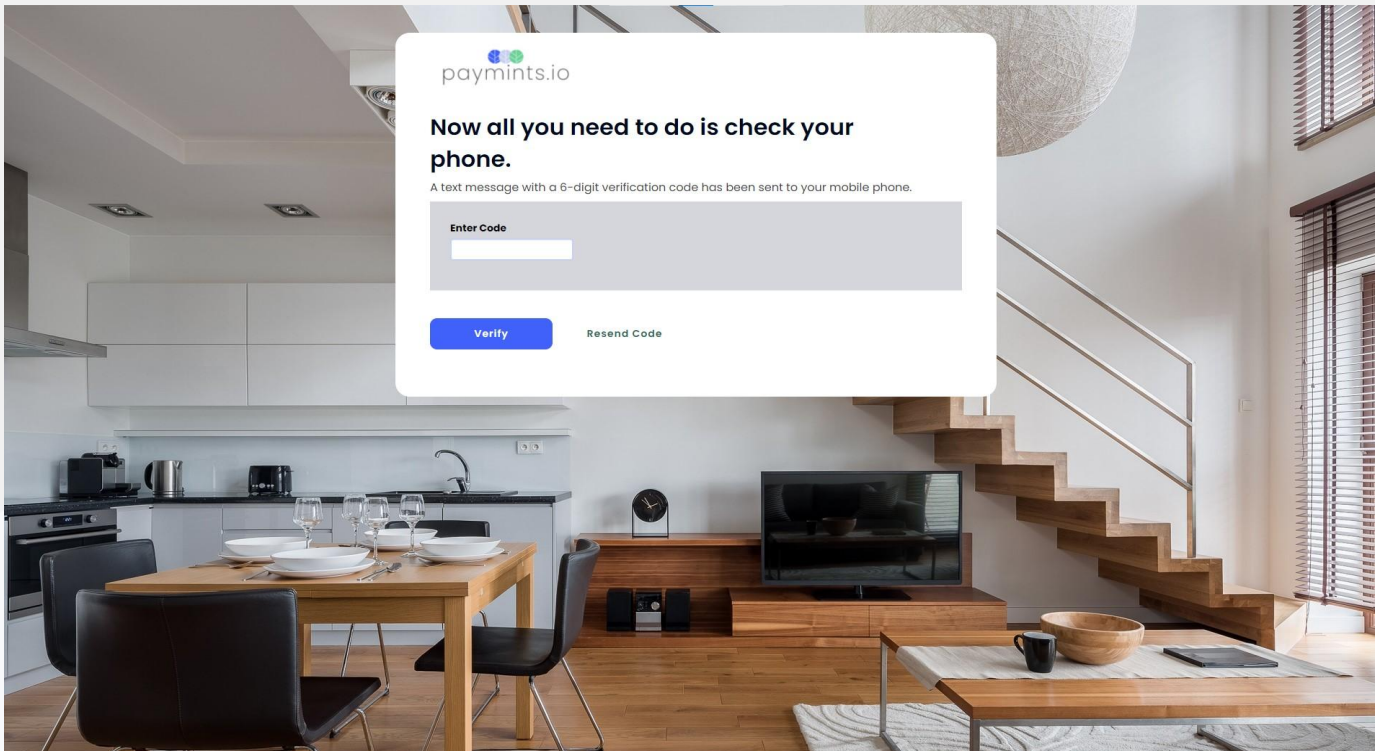
By clicking Create Account, you agree to paymints.io [Terms of Service](#) and [Privacy Policy](#) as well as our partner Dwolla's [Terms of Service](#) and [Privacy Policy](#).

[Create Account](#)

Already registered? [Click to log in](#)

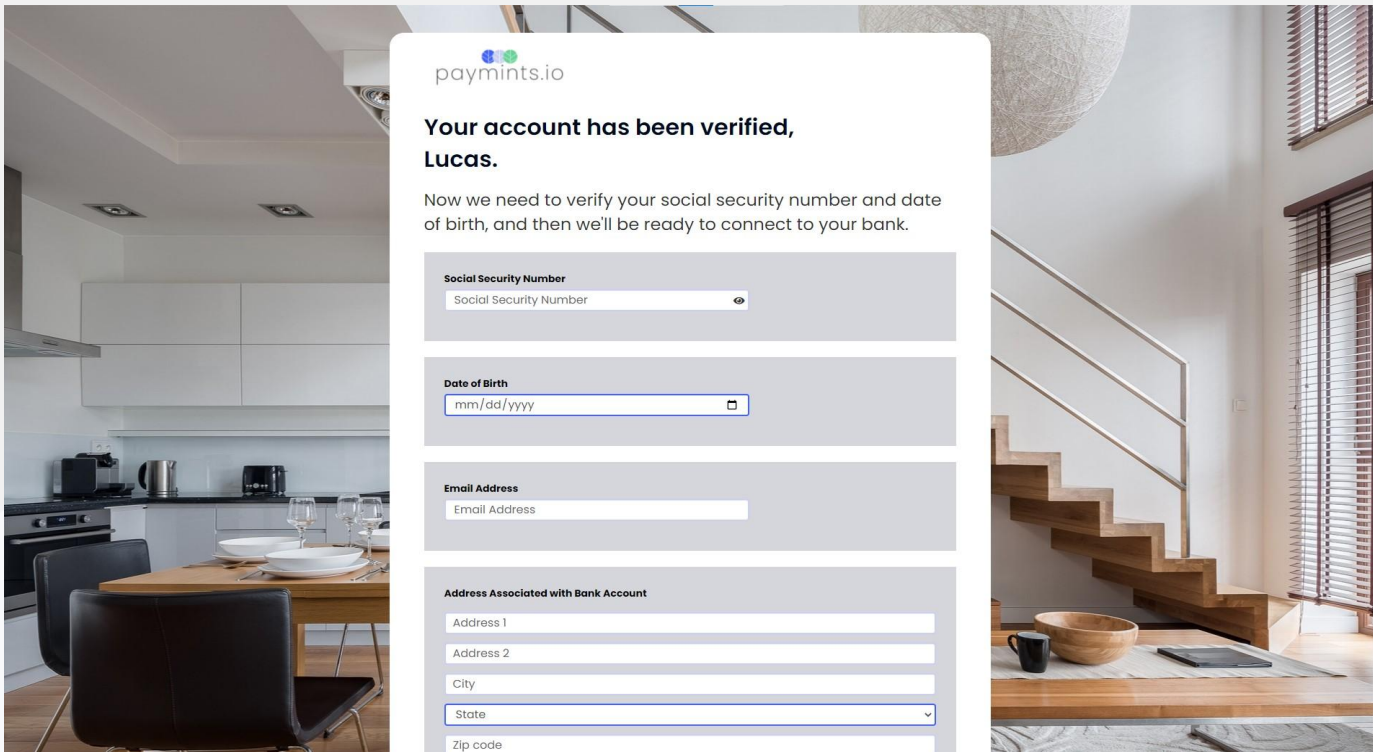
# 2

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



# 3

Please input your personal information for an OFAC check.



paymints.io

**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

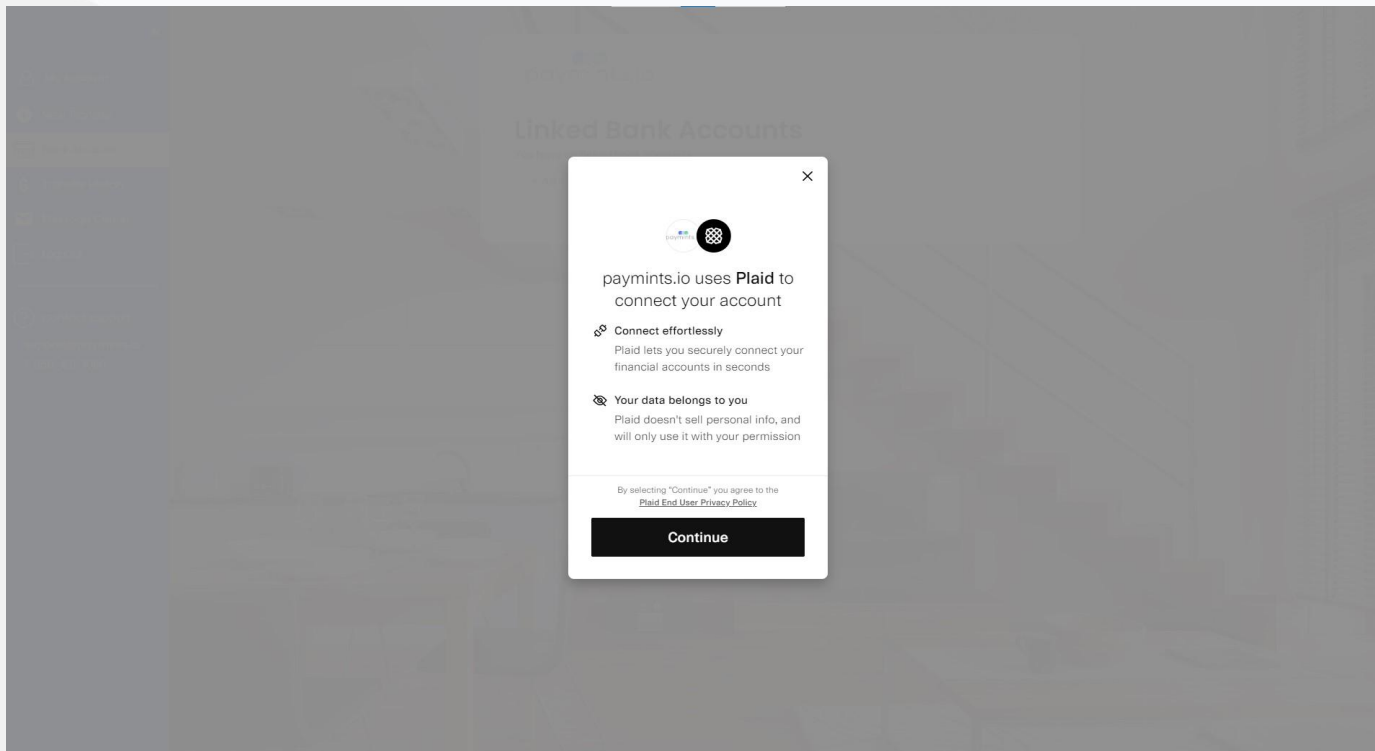
City

State

Zip code

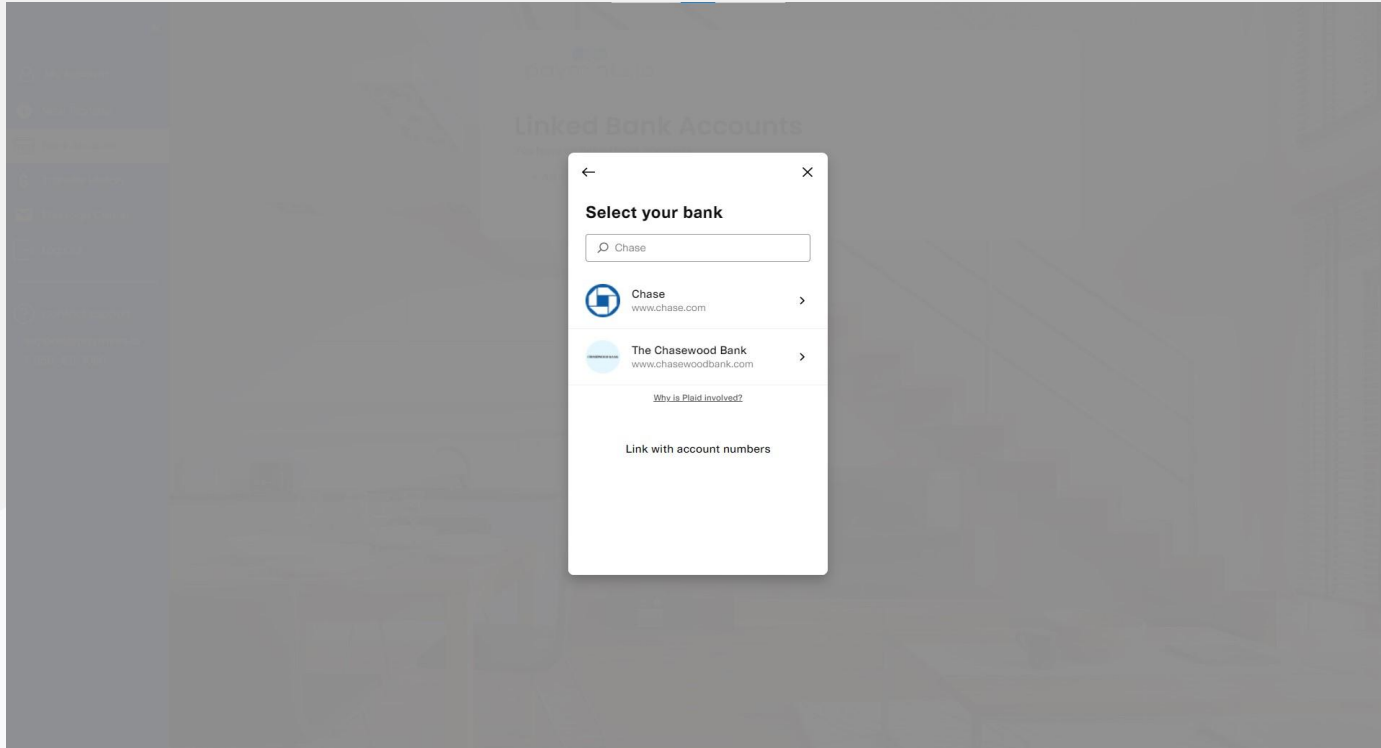
# 4

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.



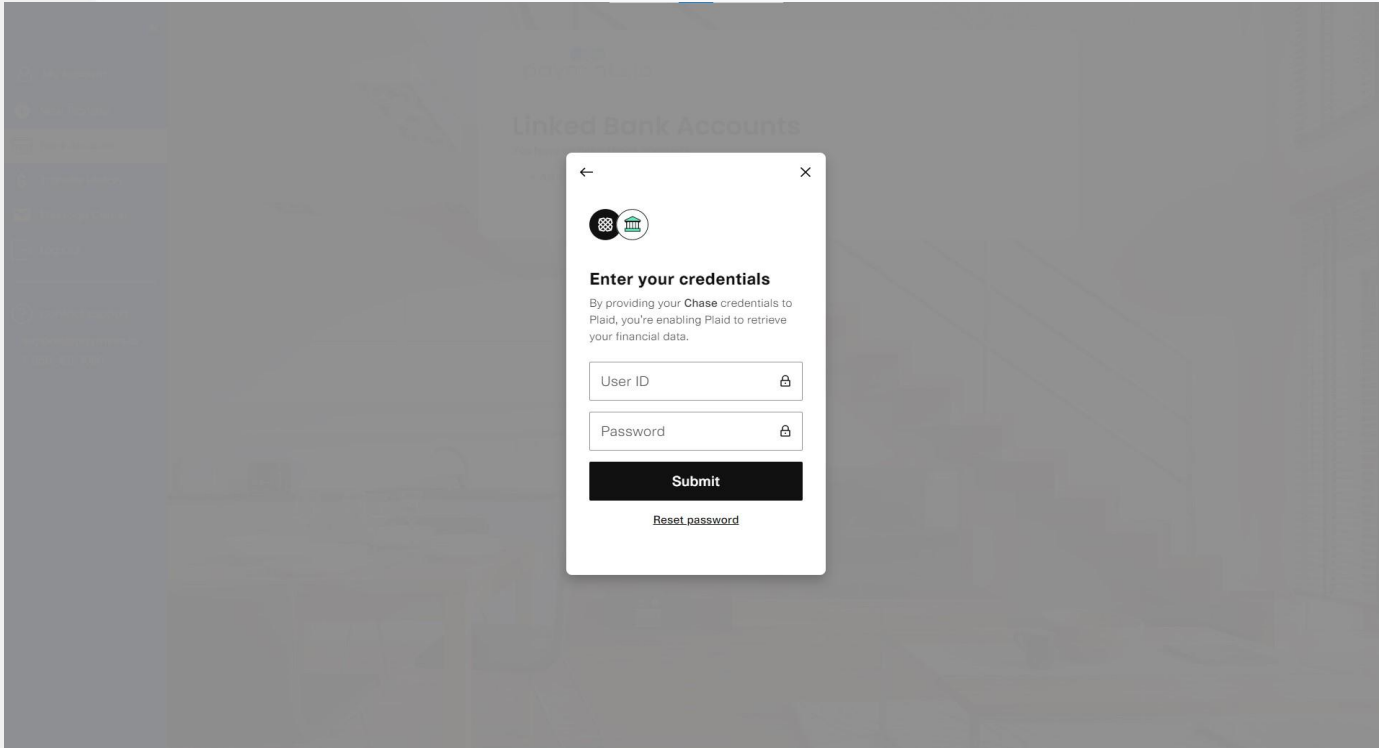
5

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.



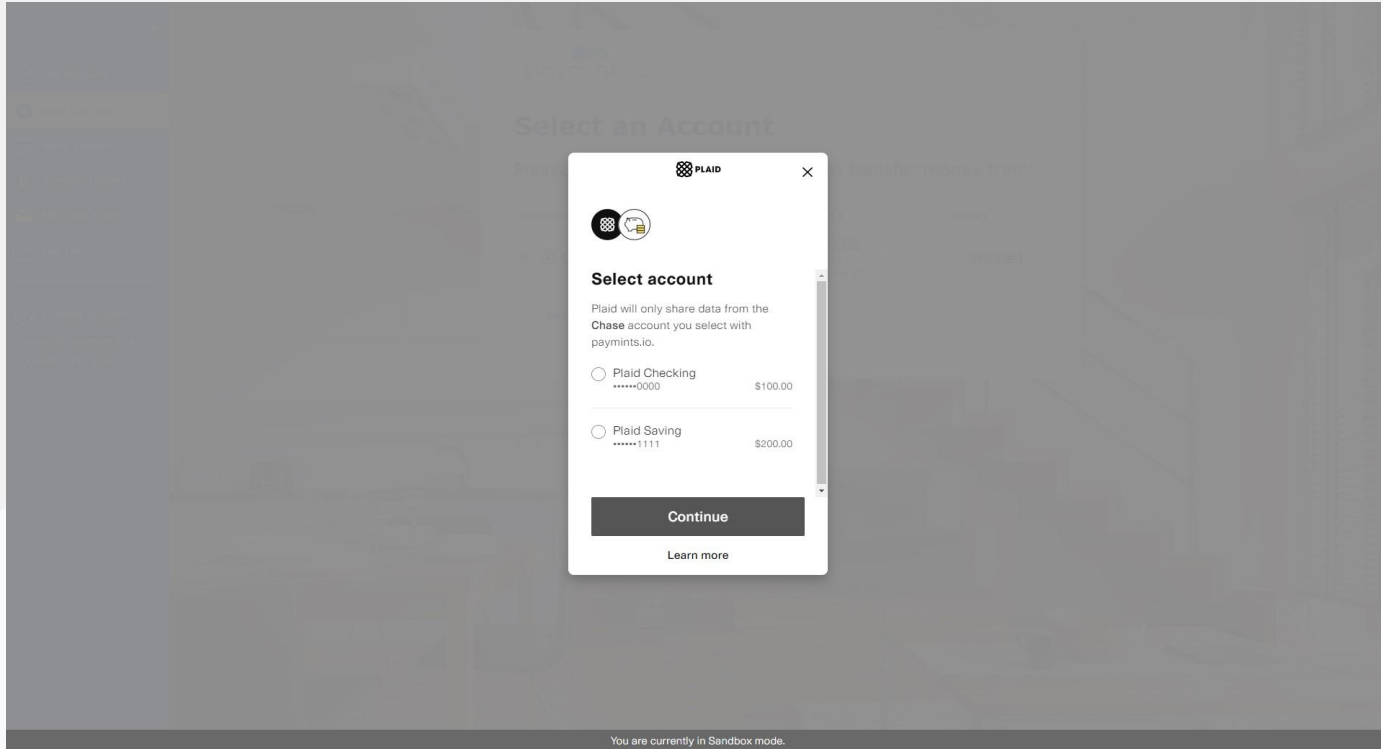
6

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.



You are currently in Sandbox mode.



# 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 subtext "Please select the account you want to transfer money from:". Below this is a table with the following data:

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 are two buttons: "+ Add Account" and "Continue". 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 sidebar with navigation options: My Account, New Transfer, Bank Account, Transfer History, Message Center, Log Out, and Contact support. The main content area is a white card with the following information:

**Review**  
Please confirm that the information below is correct before continuing.

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

**Details**

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

Earnest Money Deposit For Purchase Amount \$1.23

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

Buttons: < Back, Make Transfer

# 11

Once you have clicked “Make Transfer” both you and Prestige Title Insurance will receive email notifications that the transfer has been initiated. You will also receive an email notification when the transfer arrives in Prestige Title Insurance’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.

**paymints.io**

### 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

---

**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) or 1-888-921-1090

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

