

Introducing Plaid Assets

November 2023



About Plaid Assets

What is Plaid?

Plaid is a tool that lets you connect your financial accounts to your apps in seconds.

How Does Plaid Work?

When you choose to connect your financial accounts to an app using Plaid, you will be prompted to enter the username and password associated with those accounts. Plaid then links your accounts to the app you want to use so you can share your data.

How Does Visio Use Plaid?

Visio Lending uses Plaid to help with a seamless underwriting process that links directly through the Borrower Portal. Plaid will provide our team with a detailed view of a user's financial situation.

Is it secure?

Yes, Plaid is secure. When you want to share data from your financial accounts with an app, Plaid works to transfer your data securely.

About Visio

Visio Lending is the nation's premier lender for rental properties with over 13k closed rental loans. We enable small- to medium- sized investors all over the country to grow their portfolios of rental properties.

How to Send Visio Your Financial Data Using Plaid

#1 Add Assets via Plaid

From the Documents Section of the Borrower Portal, select Add Assets via Plaid.

The screenshot shows the 'J Test's Assets Added' section of the Visio Lending Borrower Portal. The page has a navigation bar with 'Our Process', 'Loan Programs', 'Partner Programs', 'About Us', and 'Resources'. A 'What is Plaid?' link and an 'Add Assets via Plaid' button are highlighted in a blue box. Below is a table of assets:

Institution Name	Date Added	Total Amount
Wells Fargo <small>New</small>	10/03/2023	\$1320
Plaid Checking (*****0000) <small>New</small>	10/03/2023	\$110
Plaid Saving (*****1111) <small>New</small>	10/03/2023	\$210
Plaid CD (*****2222) <small>New</small>	10/03/2023	\$1000

#2 Select Your Financial Institution

The screenshot shows the Plaid 'Select your institution' interface. It features a search bar with 'wellsf' entered. Below the search bar is a list of institutions:

- Wells Fargo www.wellsfargo.com
- Connections Bank Midwest www.connections.bank
- Wells River Savings Bank www.wellsriversavings.com/
- Empower Retirement - Wells Fargo my401kplan.empower-retirement.com
- Empower Retirement - WellSpan Health



Log in at Wells Fargo

After you log in, **select the info below** to share the required data with J Test.

SELECT AT WELLS FARGO

Share all accounts

Account Holder Names & Roles

Profile information

[Continue to login](#)

#3

Link the Accounts

Use Your Login Credentials for that Institution to Link the Accounts



#4

Select Data to Share

Select which data from that account you would like to share with Visio Lending.

Connect account information

Select the accounts you want First Platypus to connect with Plaid. Please note that not all account information may be available for connecting at this time.

Select account(s) to share

Plaid Checking
... .. 0000

Plaid Saving
... .. 1111









Plaid CD
... .. 2222

Plaid Credit Card
... .. 3333



Review the types of financial data you'll share

J Test is requesting the following types of financial data from Wells Fargo:

-  Account and balance info 
-  Contact details 
-  Transactions 
-  Investments 

[Review the detailed info you'll be sharing](#)

Allow

By selecting "Allow," you agree to share this and updated info required by J Test

#5

Verify Selection

Verify that you are certain that you wish to share the data.

