

Overview

Report Information

Provided by the requester

Requester report ID	example_report_id
Requester user ID	example_user_id
Requested on	May 9, 2024
Days requested	30
Accounts	1

Borrower Information

Provided by the requester

First name	John
Middle name	Deere
Last name	Doe
SSN	123-45-7890
Phone number	3214560987
Email	john@doe.com

Asset Summary

Sourced from the institution

Institution	Account	Account Mask	Current Balance
Chase	Plaid Student Loan	????	\$65,262.00
Chase	Plaid 401k	EEEE	\$23,631.98
Chase	Plaid Diamond 12.5% APR Interest Credit Card	3333	\$410.00
Chase	Plaid Gold Standard 0% Interest Checking	0000	\$110.00
Chase	Plaid Silver Standard 0.1% Interest Saving	1111	\$210.00
Chase	Plaid Bronze Standard 0.2% Interest CD	2222	\$1,000.00
Chase	Plaid Platinum Standard 1.85% Interest Money Market	4444	\$43,200.00
Chase	Plaid Mortgage	8888	\$56,302.06
Chase	Plaid IRA	5555	\$320.76

*For investment accounts, current balance reflects total investment holdings in USD

Account Overview

INSTITUTION: Chase

ACCOUNT NAME: Plaid Student Loan

ACCOUNT MASK: ? ? ? ?

Report Information

Provided by the requester

Requester report ID	example_report_id
Requested on	May 9, 2024
Data as of	May 9, 2024
Days requested	30
Days available	0

Account Holder Information

Sourced from the institution

Names	Alberta Bobbeth Charleson
Addresses	2992 Cameron Road Malakoff, NY 14236 US 2493 Leisure Lane San Matias, CA 93405-2255 US
Phone numbers	1112223333 1112224444 1112225555
Emails	accountholder0@example.com accountholder1@example.com extraordinarily.long.email.username.1234 56@reallylonghostname.com

Account Summary

Sourced from the institution

Current Balance	\$65,262.00
Available Balance	N/A
Account Type	Loan

Account Overview

INSTITUTION: Chase ACCOUNT NAME: Plaid 401k ACCOUNT MASK: EEEEE

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Account Summary

Sourced from the institution

Current Balance	\$23,631.98
Available Balance	N/A
Account Type	Investment

Account Overview

INSTITUTION: Chase ACCOUNT NAME: Plaid Diamond 12.5% APR Interest Credit Card ACCOUNT MASK: 3333

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Account Summary

Sourced from the institution

Current Balance	\$410.00
Available Balance	N/A
Account Type	Credit

Account History

Posted

Date	Description	Inflow	Outflow	Ending Daily Balance
April 22, 2024	Touchstone Climbing	---	\$78.50	-\$3,668.50
May 3, 2024	Madison Bicycle Shop	---	\$500.00	---
May 3, 2024	KFC	---	\$500.00	---
May 3, 2024	AUTOMATIC PAYMENT - THANK	---	\$2,078.50	-\$590.00
May 4, 2024	Tectra Inc	---	\$500.00	-\$90.00
May 9, 2024	United Airlines	---	\$500.00	---

Pending

Date	Description	Inflow	Outflow
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Account Overview

INSTITUTION: Chase ACCOUNT NAME: Plaid Gold Standard 0% Interest Checking ACCOUNT MASK: 0000

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Account Summary

Sourced from the institution

Current Balance	\$110.00
Available Balance	\$100.00
Account Type	Depository

Account History

Posted

Date	Description	Inflow	Outflow	Ending Daily Balance
April 20, 2024	SparkFun	---	\$89.40	-\$361.94
April 21, 2024	McDonalds #3322	---	\$12.00	---
April 21, 2024	Starbucks	---	\$4.33	-\$378.27
April 22, 2024	United Airlines **** REFUND ****	\$500.00	---	\$121.73
April 24, 2024	Uber 063015 SF**POOL**	---	\$5.40	\$116.33
May 7, 2024	Uber 072515 SF**POOL**	---	\$6.33	\$110.00

Pending

Date	Description	Inflow	Outflow
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Account Overview

INSTITUTION: Chase ACCOUNT NAME: Plaid Silver Standard 0.1% Interest Saving ACCOUNT MASK: 1111

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Account Summary

Sourced from the institution

Current Balance	\$210.00
Available Balance	\$200.00
Account Type	Depository

Account History

Posted

Date	Description	Inflow	Outflow	Ending Daily Balance
April 19, 2024	INTRST PYMNT	\$4.22	---	\$235.00
April 24, 2024	CREDIT CARD 3333 PAYMENT *//	---	\$25.00	\$210.00

Pending

Date	Description	Inflow	Outflow
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Account Overview

INSTITUTION: Chase

ACCOUNT NAME: Plaid Bronze Standard 0.2% Interest CD

ACCOUNT MASK: 2 2 2 2

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Account Summary

Sourced from the institution

Current Balance	\$1,000.00
Available Balance	N/A
Account Type	Depository

Account History

Posted

Date	Description	Inflow	Outflow	Ending Daily Balance
April 23, 2024	CD DEPOSIT .INITIAL.	---	\$1,000.00	\$1,000.00

Pending

Date	Description	Inflow	Outflow
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Account Overview

INSTITUTION:
Chase

ACCOUNT NAME: Plaid Platinum Standard 1.85% Interest Money
Market

ACCOUNT MASK:
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	1112223333
Phone numbers	1112224444 1112225555
	accountholder0@example.com accountholder1@example.com extraordinarily.long.email.username.1234 56@reallylonghostname.com
Emails	

Account Summary

Sourced from the institution

Current Balance	\$43,200.00
Available Balance	\$43,200.00
Account Type	Depository

Account History

Posted

Date	Description	Inflow	Outflow	Ending Daily Balance
April 23, 2024	ACH Electronic CreditGUSTO PAY 123456 ---		\$5,850.00	\$43,200.00

Pending

Date	Description	Inflow	Outflow
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Account Overview

INSTITUTION: Chase ACCOUNT NAME: Plaid Mortgage ACCOUNT MASK: 8888

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Account Summary

Sourced from the institution

Current Balance	\$56,302.06
Available Balance	N/A
Account Type	Loan

Account Overview

INSTITUTION: Chase

ACCOUNT NAME: Plaid IRA

ACCOUNT MASK: 5555

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Account Summary

Sourced from the institution

Current Balance	\$320.76
Available Balance	N/A
Account Type	Investment