

# Overview

## Report Information

Provided by the requester

Requester report ID	123
Requester user ID	789
Requested on	March 3, 2021
Days requested	60
Accounts	9

## Borrower Information

Provided by the requester

First name	Jane
Middle name	Leah
Last name	Doe
SSN	... .. 6789
Phone number	(555) 123-4567
Email	jane.doe@example.com

## Asset Summary

Sourced from the institution

Institution	Account	Account Mask	Current Balance	Page
Bank of America	Plaid Platinum Standard 1.85% Interest Money Market	4444	\$43,200.00	2
Bank of America	Plaid IRA	5555	\$320.76	4
Bank of America	Plaid Diamond 12.5% APR Interest Credit Card	3333	\$410.00	5
Bank of America	Plaid Silver Standard 0.1% Interest Saving	1111	\$210.00	7
Bank of America	Plaid Bronze Standard 0.2% Interest CD	2222	\$1,000.00	9
Bank of America	Plaid Gold Standard 0% Interest Checking	0000	\$110.00	11
Bank of America	Plaid Mortgage	8888	\$56,302.06	13
Bank of America	Plaid Student Loan	7777	\$65,262.00	14
Bank of America	Plaid 401k	6666	\$23,631.98	15

## Account Overview

INSTITUTION: BANK OF AMERICA • ACCOUNT NAME: PLAID PLATINUM STANDARD 1.85% INTEREST MONEY MARKET •  
ACCOUNT MASK: 4444

### Report Information

Provided by the requester

Requester report ID	123
Requested on	March 3, 2021
Data as of	March 3, 2021
Days requested	60
Days available	60

### 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.1 23456@reallylonghostname.com

### Account Summary

Sourced from the institution

Current balance	\$43,200.00
Available balance	\$43,200.00
Type	Depository

### Account History

Posted

Date	Description	Inflow	Outflow	Ending daily balance
January 9, 2021	ACH Electronic CreditGUSTO PAY 123456	---	\$5,850.00	\$49,050.00
February 8, 2021	ACH Electronic CreditGUSTO PAY 123456	---	\$5,850.00	\$43,200.00

Pending



**PLAID**

ASSET REPORT

Date	Description	Inflow	Outflow
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## Account Overview

INSTITUTION: BANK OF AMERICA • ACCOUNT NAME: PLAID IRA • ACCOUNT MASK: 5555

### Report Information

Provided by the requester

Requester report ID	123
Requested on	March 3, 2021
Data as of	March 3, 2021
Days requested	60
Days available	60

### Account Holder Information

Sourced from the institution

Names	Alberta Bobbeth Charleson
	2992 Cameron Road Malakoff, NY 14236 US
Addresses	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.1 23456@reallylonghostname.com

### Account Summary

Sourced from the institution

Current balance	\$320.76
Available balance	N/A
Type	Brokerage

## Account Overview

**INSTITUTION:** BANK OF AMERICA • **ACCOUNT NAME:** PLAID DIAMOND 12.5% APR INTEREST CREDIT CARD • **ACCOUNT MASK:** 3333

### Report Information

Provided by the requester

Requester report ID	123
Requested on	March 3, 2021
Data as of	March 3, 2021
Days requested	60
Days available	60

### 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.1 23456@reallylonghostname.com

### Account Summary

Sourced from the institution

Current balance	\$410.00
Available balance	N/A
Type	Credit

### Account History

Posted

Date	Description	Inflow	Outflow	Ending daily balance
January 8, 2021	Touchstone Climbing	---	\$78.50	-\$7,825.50
January 19, 2021	Madison Bicycle Shop	---	\$500.00	---
January 19, 2021	KFC	---	\$500.00	---



#### ASSET REPORT

Date	Description	Inflow	Outflow	Ending daily balance
January 19, 2021	AUTOMATIC PAYMENT - THANK	---	\$2,078.50	-\$4,747.00
January 20, 2021	Tectra Inc	---	\$500.00	-\$4,247.00
January 25, 2021	United Airlines	---	\$500.00	-\$3,747.00
February 7, 2021	Touchstone Climbing	---	\$78.50	-\$3,668.50
February 18, 2021	Madison Bicycle Shop	---	\$500.00	---
February 18, 2021	KFC	---	\$500.00	---
February 18, 2021	AUTOMATIC PAYMENT - THANK	---	\$2,078.50	-\$590.00
February 19, 2021	Tectra Inc	---	\$500.00	-\$90.00
February 24, 2021	United Airlines	---	\$500.00	\$410.00

#### Pending

Date	Description	Inflow	Outflow
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## Account Overview

INSTITUTION: BANK OF AMERICA • ACCOUNT NAME: PLAID SILVER STANDARD 0.1% INTEREST SAVING • ACCOUNT MASK: 1111

### Report Information

Provided by the requester

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Requested on	March 3, 2021
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Days requested	60
Days available	60

### Account Holder Information

Sourced from the institution

Names	Alberta Bobbeth Charleson
	2992 Cameron Road Malakoff, NY 14236 US
Addresses	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.1 23456@reallylonghostname.com

### Account Summary

Sourced from the institution

Current balance	\$210.00
Available balance	\$200.00
Type	Depository

### Account History

Posted

Date	Description	Inflow	Outflow	Ending daily balance
January 5, 2021	INTRST PYMNT	\$4.22	---	\$255.78
January 10, 2021	CREDIT CARD 3333 PAYMENT *//	---	\$25.00	\$230.78
February 4, 2021	INTRST PYMNT	\$4.22	---	\$235.00



**PLAID**

ASSET REPORT

Date	Description	Inflow	Outflow	Ending daily balance
February 9, 2021	CREDIT CARD 3333 PAYMENT *//	---	\$25.00	\$210.00

Pending

Date	Description	Inflow	Outflow
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## Account Overview

INSTITUTION: BANK OF AMERICA • ACCOUNT NAME: PLAID BRONZE STANDARD 0.2% INTEREST CD • ACCOUNT MASK: 2222

### Report Information

Provided by the requester

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Days available	60

### 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.1 23456@reallylonghostname.com

### Account Summary

Sourced from the institution

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

### Account History

Posted

Date	Description	Inflow	Outflow	Ending daily balance
January 9, 2021	CD DEPOSIT .INITIAL.	---	\$1,000.00	\$2,000.00
February 8, 2021	CD DEPOSIT .INITIAL.	---	\$1,000.00	\$1,000.00

Pending



**PLAID**

ASSET REPORT

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Date	Description	Inflow	Outflow
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## Account Overview

INSTITUTION: BANK OF AMERICA • ACCOUNT NAME: PLAID GOLD STANDARD 0% INTEREST CHECKING • ACCOUNT MASK: 0000

### Report Information

Provided by the requester

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Requested on	March 3, 2021
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Days requested	60
Days available	60

### Account Holder Information

Sourced from the institution

Names	Alberta Bobbeth Charleson
	2992 Cameron Road Malakoff, NY 14236 US
Addresses	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.1 23456@reallylonghostname.com

### Account Summary

Sourced from the institution

Current balance	\$110.00
Available balance	\$100.00
Type	Depository

### Account History

Posted

Date	Description	Inflow	Outflow	Ending daily balance
January 6, 2021	SparkFun	---	\$89.40	-\$744.48
January 7, 2021	McDonalds #3322	---	\$12.00	---
January 7, 2021	Starbucks	---	\$4.33	-\$760.81



# ASSET REPORT

Date	Description	Inflow	Outflow	Ending daily balance
January 8, 2021	United Airlines **** REFUND ****	\$500.00	---	-\$260.81
January 10, 2021	Uber 063015 SF**POOL**	---	\$5.40	-\$266.21
January 23, 2021	Uber 072515 SF**POOL**	---	\$6.33	-\$272.54
February 5, 2021	SparkFun	---	\$89.40	-\$361.94
February 6, 2021	McDonalds #3322	---	\$12.00	---
February 6, 2021	Starbucks	---	\$4.33	-\$378.27
February 7, 2021	United Airlines **** REFUND ****	\$500.00	---	\$121.73
February 9, 2021	Uber 063015 SF**POOL**	---	\$5.40	\$116.33
February 22, 2021	Uber 072515 SF**POOL**	---	\$6.33	\$110.00

## Pending

Date	Description	Inflow	Outflow
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## Account Overview

INSTITUTION: BANK OF AMERICA • ACCOUNT NAME: PLAID MORTGAGE • ACCOUNT MASK: aaaa

### Report Information

Provided by the requester

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### Account Holder Information

Sourced from the institution

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### Account Summary

Sourced from the institution

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

## Account Overview

INSTITUTION: BANK OF AMERICA • ACCOUNT NAME: PLAID STUDENT LOAN • ACCOUNT MASK: ????

### Report Information

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Days available	60

### Account Holder Information

Sourced from the institution

Names	Alberta Bobbeth Charleson
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### Account Summary

Sourced from the institution

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

# Account Overview

INSTITUTION: BANK OF AMERICA • ACCOUNT NAME: PLAID 401K • ACCOUNT MASK: EEE

## Report Information

Provided by the requester

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Days available	60

## Account Holder Information

Sourced from the institution

Names	Alberta Bobbeth Charleson
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Phone numbers	1112223333 1112224444 1112225555
Emails	accountholder0@example.com accountholder1@example.com extraordinarily.long.email.username.1 23456@reallylonghostname.com

## Account Summary

Sourced from the institution

Current balance	\$23,631.98
Available balance	N/A
Type	Brokerage