

Overview

Report Information

Provided by the requester

Requester report ID	123
Requester user ID	7f57eb3d2a9j6480121fx361
Requested on	May 26, 2022
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
Chase	Plaid Gold Standard 0% Interest Checking	0000	\$110.00	2
Chase	Plaid Mortgage	8888	\$56,302.06	4
Chase	Plaid Silver Standard 0.1% Interest Saving	1111	\$210.00	5
Chase	Plaid IRA	5555	\$320.76	7
Chase	Plaid Bronze Standard 0.2% Interest CD	2222	\$1,000.00	8
Chase	Plaid Diamond 12.5% APR Interest Credit Card	3333	\$410.00	10
Chase	Plaid Platinum Standard 1.85% Interest Money Market	4444	\$43,200.00	12
Chase	Plaid 401k	6666	\$23,631.98	14
Chase	Plaid Student Loan	7777	\$65,262.00	15

Account Overview

INSTITUTION: CHASE • ACCOUNT NAME: PLAID GOLD STANDARD 0% INTEREST CHECKING • ACCOUNT MASK: 0000

Report Information

Provided by the requester

Requester report ID	123
Requested on	May 26, 2022
Data as of	May 26, 2022
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
April 1, 2022	SparkFun	---	\$89.40	-\$744.48
April 2, 2022	McDonalds #3322	---	\$12.00	---
April 2, 2022	Starbucks	---	\$4.33	-\$760.81



ASSET REPORT

Date	Description	Inflow	Outflow	Ending daily balance
April 3, 2022	United Airlines **** REFUND ****	\$500.00	---	-\$260.81
April 5, 2022	Uber 063015 SF**POOL**	---	\$5.40	-\$266.21
April 18, 2022	Uber 072515 SF**POOL**	---	\$6.33	-\$272.54
May 1, 2022	SparkFun	---	\$89.40	-\$361.94
May 2, 2022	McDonalds #3322	---	\$12.00	---
May 2, 2022	Starbucks	---	\$4.33	-\$378.27
May 3, 2022	United Airlines **** REFUND ****	\$500.00	---	\$121.73
May 5, 2022	Uber 063015 SF**POOL**	---	\$5.40	\$116.33
May 18, 2022	Uber 072515 SF**POOL**	---	\$6.33	\$110.00

Pending

Date	Description	Inflow	Outflow
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Account Overview

INSTITUTION: CHASE • ACCOUNT NAME: PLAID MORTGAGE • ACCOUNT MASK: aaaa

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Account Summary

Sourced from the institution

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

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
Type	Depository

Account History

Posted

Date	Description	Inflow	Outflow	Ending daily balance
March 31, 2022	INTRST PYMNT	\$4.22	---	\$255.78
April 5, 2022	CREDIT CARD 3333 PAYMENT *//	---	\$25.00	\$230.78
April 30, 2022	INTRST PYMNT	\$4.22	---	\$235.00



PLAID

ASSET REPORT

Date	Description	Inflow	Outflow	Ending daily balance
May 5, 2022	CREDIT CARD 3333 PAYMENT *//	---	\$25.00	\$210.00

Pending

Date	Description	Inflow	Outflow
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Account Overview

INSTITUTION: CHASE • ACCOUNT NAME: PLAID IRA • ACCOUNT MASK: 5555

Report Information

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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	\$320.76
Available balance	N/A
Type	Brokerage

Account Overview

INSTITUTION: CHASE • ACCOUNT NAME: PLAID BRONZE STANDARD 0.2% INTEREST CD • ACCOUNT MASK: 2222

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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
April 4, 2022	CD DEPOSIT .INITIAL.	---	\$1,000.00	\$2,000.00
May 4, 2022	CD DEPOSIT .INITIAL.	---	\$1,000.00	\$1,000.00

Pending



PLAID

ASSET REPORT

Date	Description	Inflow	Outflow
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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
Type	Credit

Account History

Posted

Date	Description	Inflow	Outflow	Ending daily balance
April 3, 2022	Touchstone Climbing	---	\$78.50	-\$7,825.50
April 14, 2022	Madison Bicycle Shop	---	\$500.00	---
April 14, 2022	KFC	---	\$500.00	---



ASSET REPORT

Date	Description	Inflow	Outflow	Ending daily balance
April 14, 2022	AUTOMATIC PAYMENT - THANK	---	\$2,078.50	-\$4,747.00
April 15, 2022	Tectra Inc	---	\$500.00	-\$4,247.00
April 20, 2022	United Airlines	---	\$500.00	-\$3,747.00
May 3, 2022	Touchstone Climbing	---	\$78.50	-\$3,668.50
May 14, 2022	Madison Bicycle Shop	---	\$500.00	---
May 14, 2022	KFC	---	\$500.00	---
May 14, 2022	AUTOMATIC PAYMENT - THANK	---	\$2,078.50	-\$590.00
May 15, 2022	Tectra Inc	---	\$500.00	-\$90.00
May 20, 2022	United Airlines	---	\$500.00	\$410.00

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: 4444

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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
April 4, 2022	ACH Electronic CreditGUSTO PAY 123456	---	\$5,850.00	\$49,050.00
May 4, 2022	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: CHASE • ACCOUNT NAME: PLAID 401K • ACCOUNT MASK: 6666

Report Information

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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

Account Overview

INSTITUTION: CHASE • ACCOUNT NAME: PLAID STUDENT LOAN • ACCOUNT MASK: ????

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Account Summary

Sourced from the institution

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