



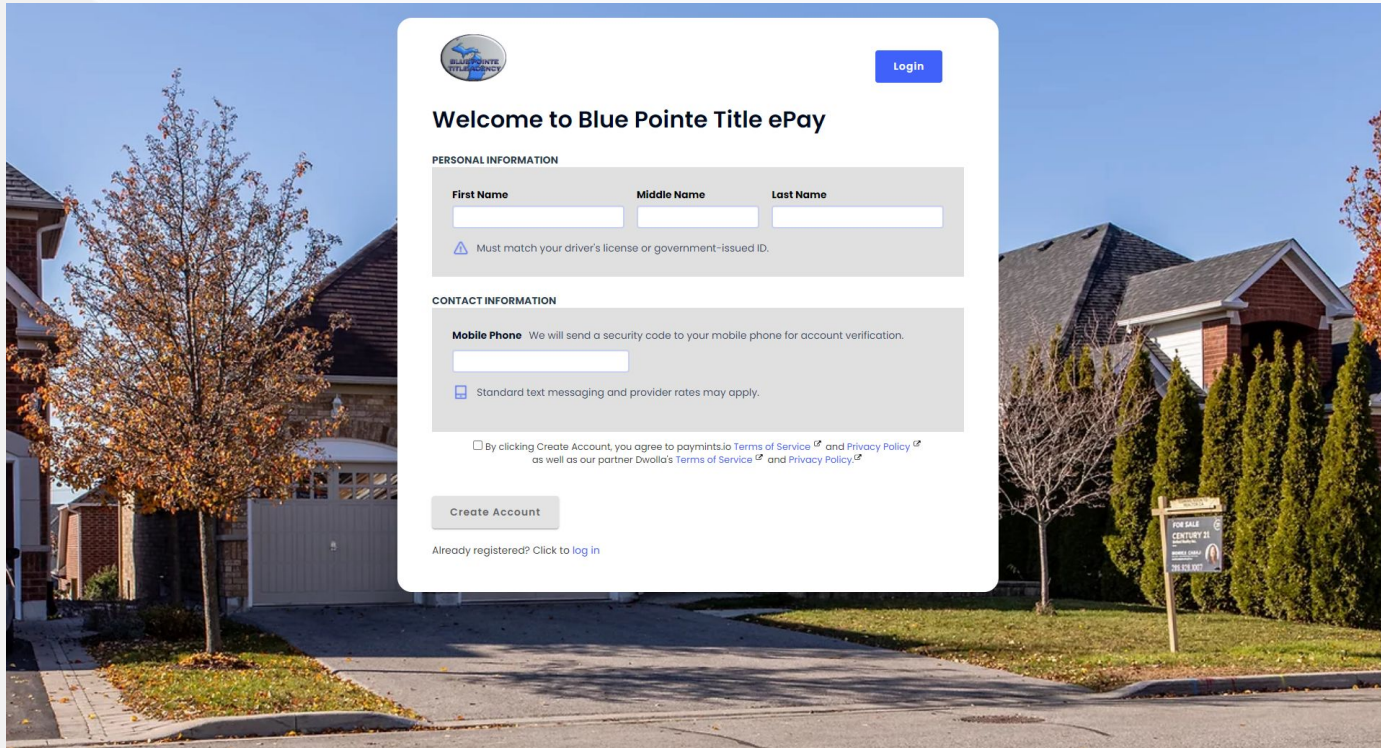
# Client Transfer Instructions

Learn More


A smartphone mockup displaying the Blue Pointe Title ePay mobile application interface. At the top left is a small circular logo, and at the top right is a blue "Login" button. The main heading reads "Welcome to Blue Pointe Title ePay". Below this is a section titled "PERSONAL INFORMATION" with three input fields for "First Name", "Middle Name", and "Last Name". A warning icon and text below the last name field state: "Must match your driver's license or government-issued ID." The next section is "CONTACT INFORMATION", which includes a "Mobile Phone" field and explanatory text: "We will send a security code to your mobile phone for account verification." Below the phone field is a checkbox with a mobile phone icon and the text "Standard text messaging and provider rates may apply." At the bottom, there is a blue "Create Account" button and a line of text: "By clicking Create Account, you agree to payments.io Terms of Service and Privacy Policy as well as our partner Dwolla's Terms of Service and Privacy Policy." The background of the phone screen is white with grey accents for the form sections.

# 1

Start by going to [bluepointetitle.paymints.io](https://bluepointetitle.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 screenshot shows a web form for account creation. At the top left is the Blue Pointe Title ePay logo, and at the top right is a blue 'Login' button. The main heading is 'Welcome to Blue Pointe Title ePay'. Below this are two sections: 'PERSONAL INFORMATION' and 'CONTACT INFORMATION'. The 'PERSONAL INFORMATION' section has three input fields for 'First Name', 'Middle Name', and 'Last Name', with a warning icon and text below stating '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.' and a text message icon with the note 'Standard text messaging and provider rates may apply.' At the bottom of the form is a 'Create Account' button and a link for 'Already registered? Click to log in'. The background image shows a residential street with a house, trees with autumn leaves, and a 'FOR SALE CENTURY 21' sign.

 [Login](#)

## Welcome to Blue Pointe Title ePay


**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.

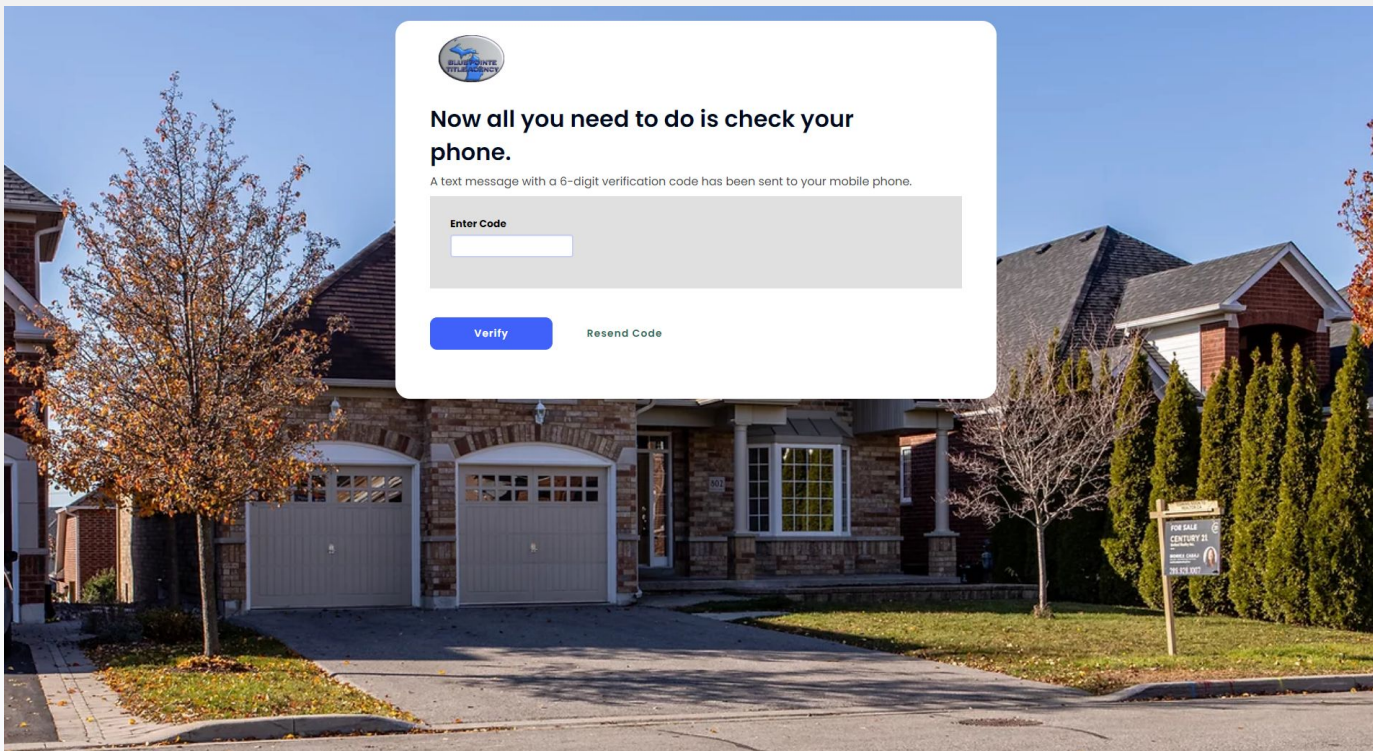
By clicking Create Account, you agree to [paymints.io Terms of Service](#) and [Privacy Policy](#) as well as our partner Dwolla's [Terms of Service](#) and [Privacy Policy](#).

[Create Account](#)

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

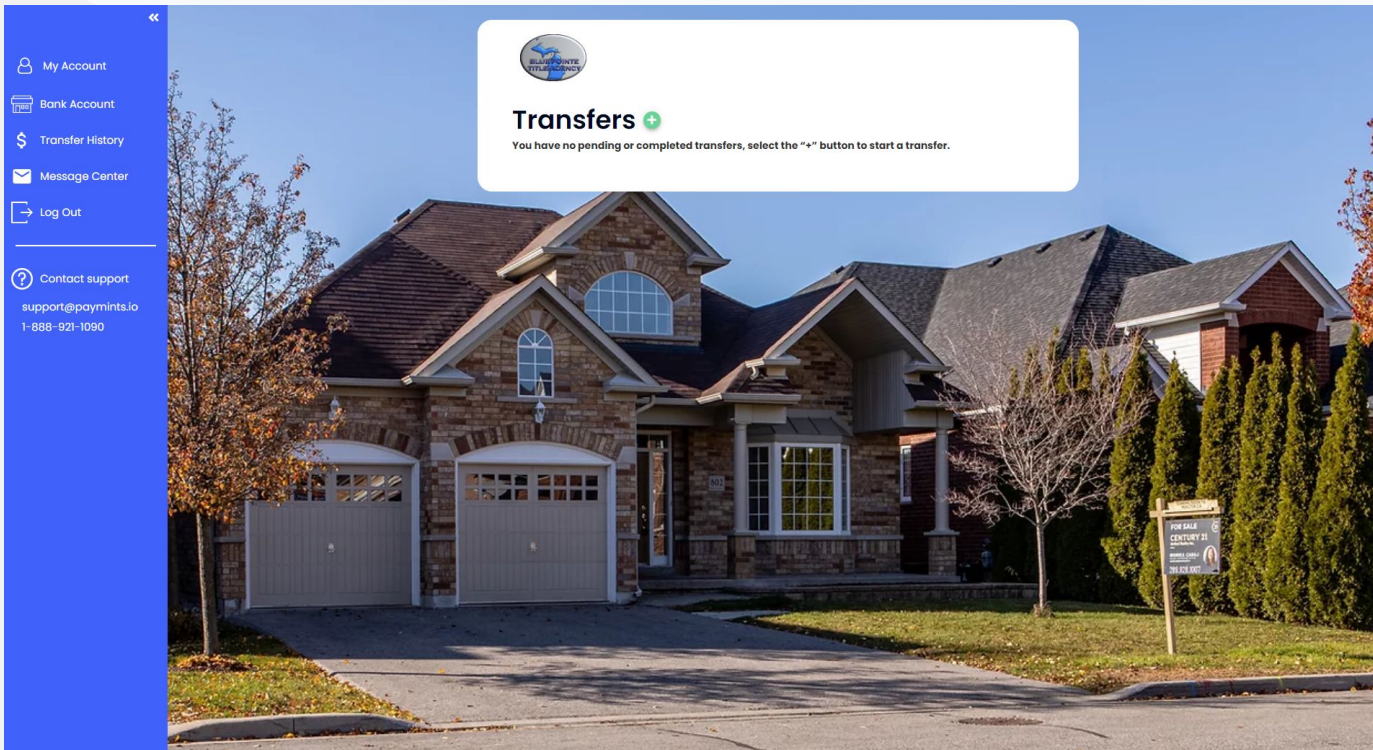
# 2

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



# 3

Click the green plus sign beside "Transfers" to start a new transfer.



# 4

Please input your personal information for an OFAC check.

**My Account**

- Bank Account
- Transfer History
- Message Center
- Log Out

**Contact support**  
support@paymnts.io  
1-888-921-1090

**WELLS FARGO**  
WELLS FARGO

**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

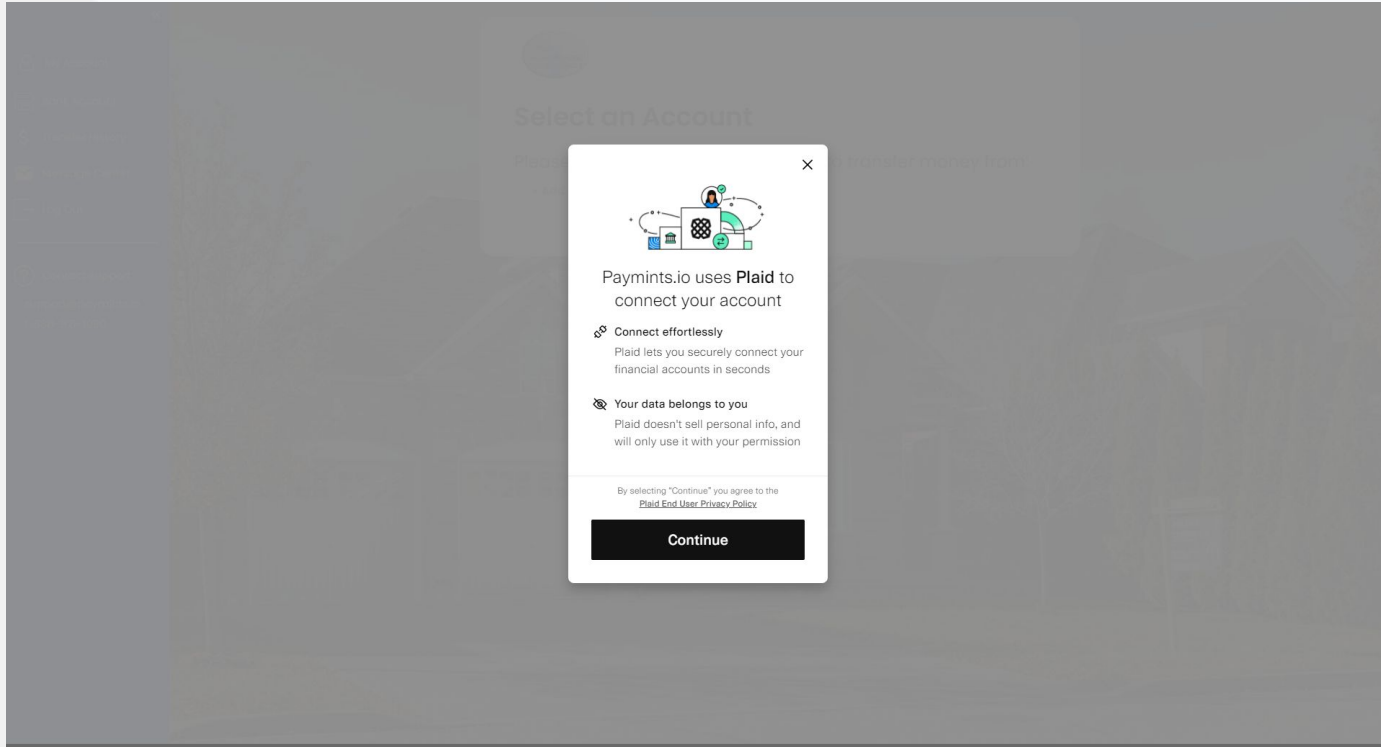
Address 2

City

State

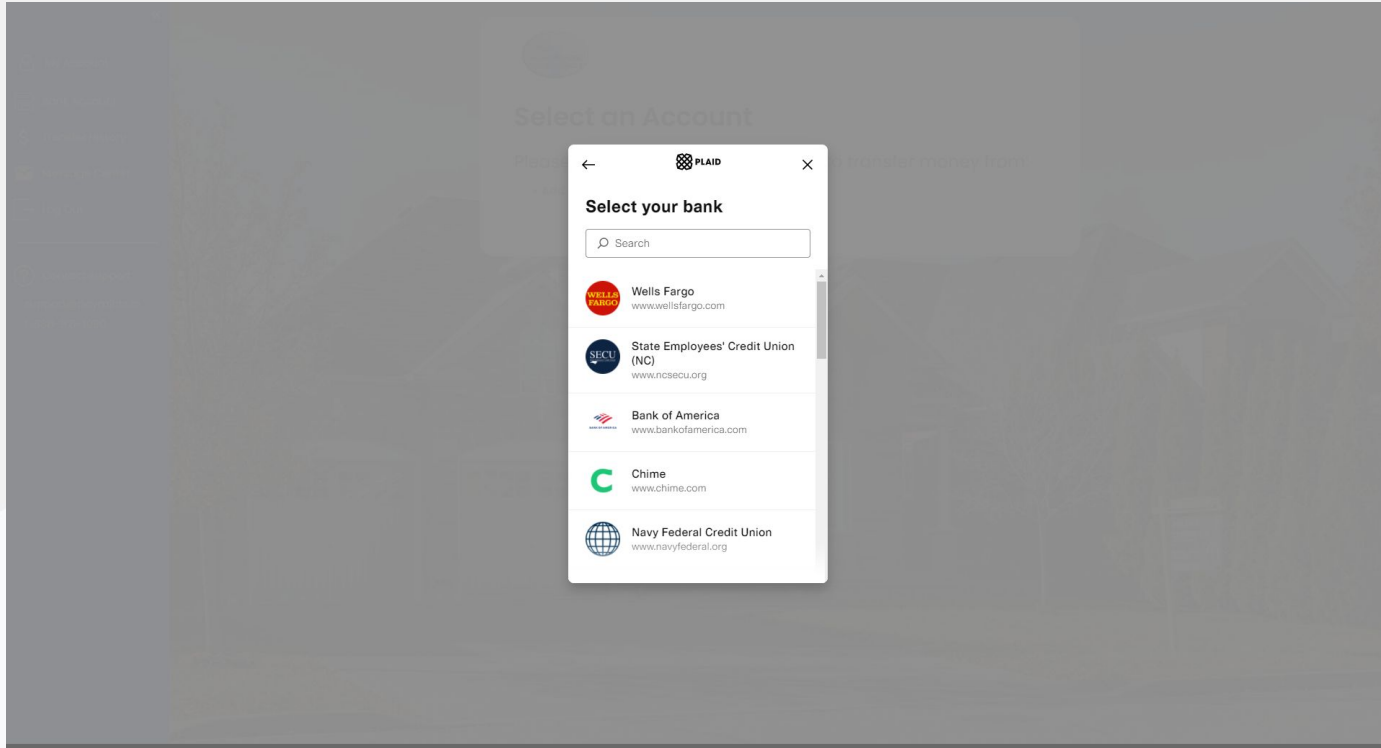
# 5

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.



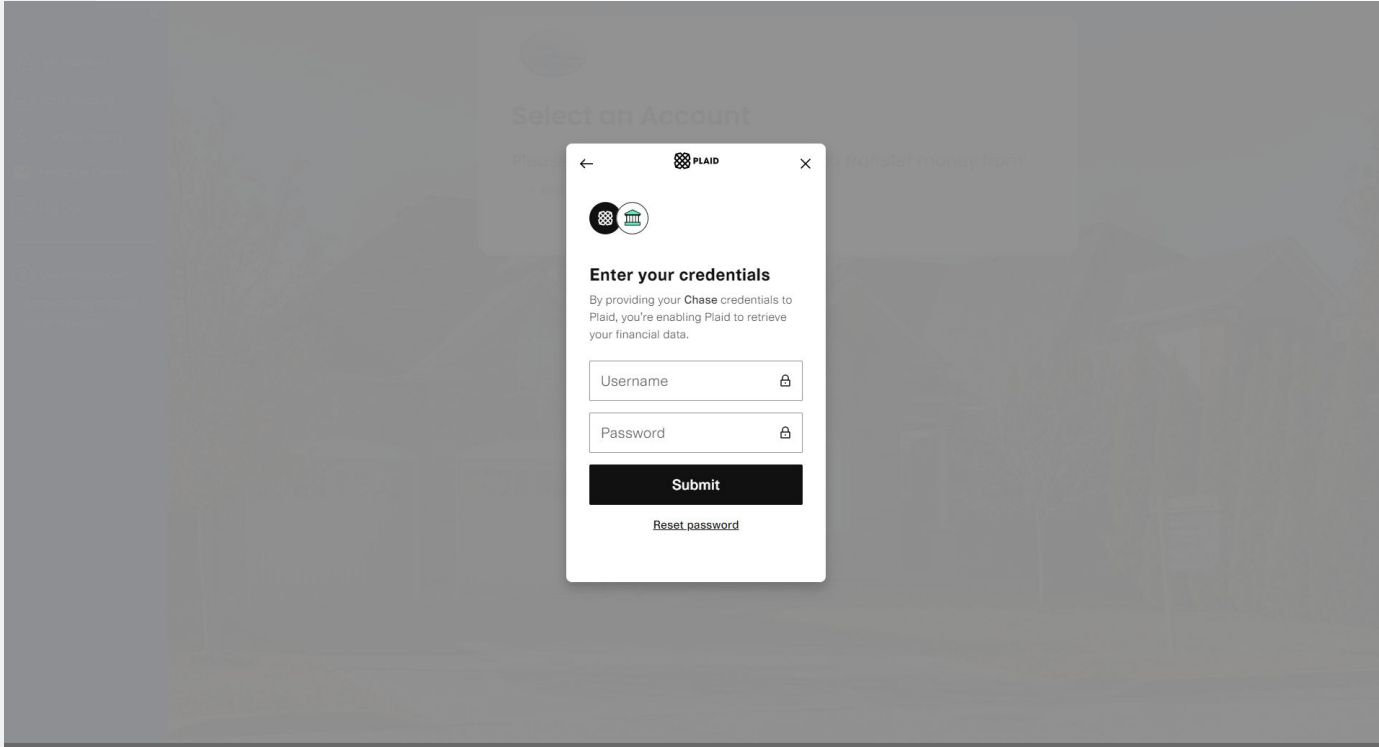
# 6

Plaid allows us to connect to over 12,000 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.



7

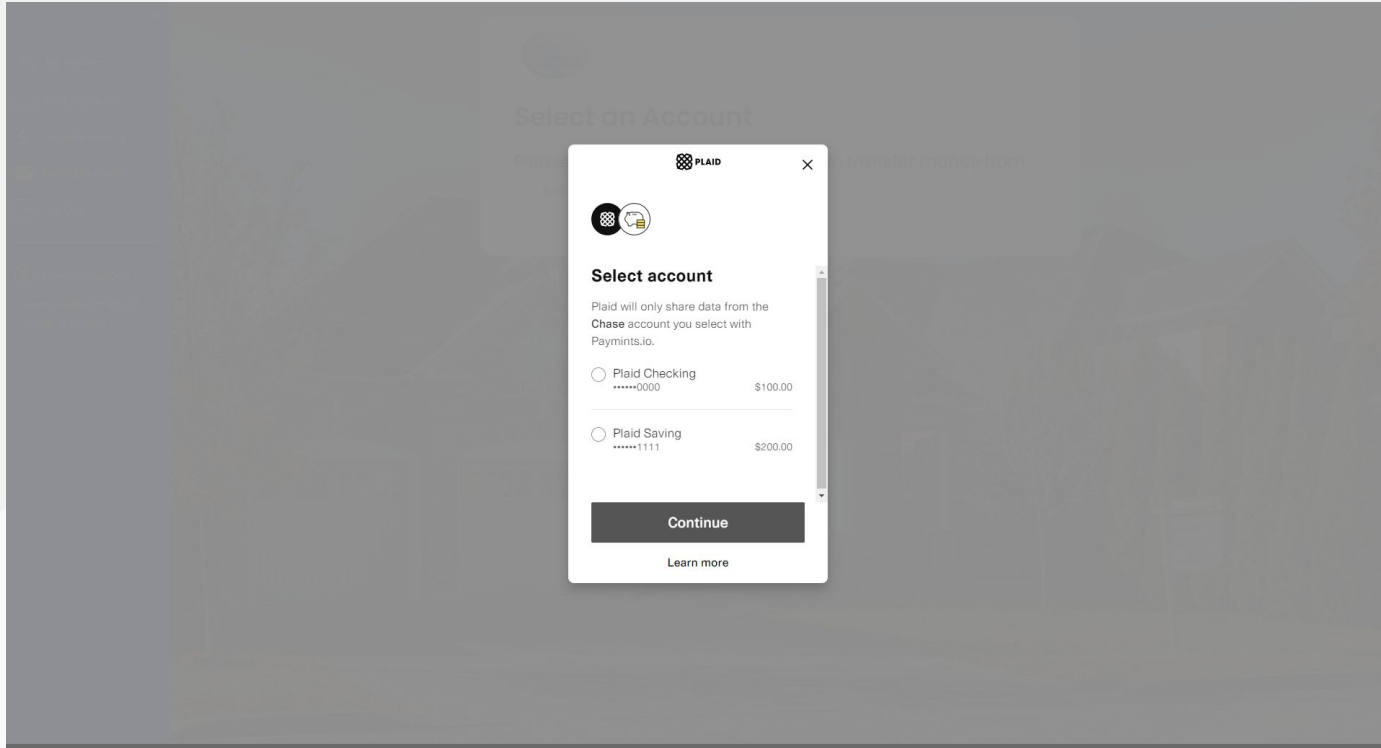
Login to your bank account with your online banking credentials. After you have selected your financial institution, log in to your bank using your online banking credentials. This will allow you to view all of your accounts which are eligible to make a transfer on our platform"





# 8

Please select the account that you would like to use to make the transfer.



# 9

Once your account has been selected please click “Continue”.

The screenshot displays a web application interface. On the left is a blue sidebar with navigation options: My Account, Bank Account, Transfer History, Message Center, Log Out, and Contact support (support@paymnts.io, 1-888-921-1090). The main content area shows a 'Select an Account' dialog box. The dialog box has the 'BLANK POINTS' logo at the top and the title 'Select an Account'. Below the title, it says 'Please select the account you want to transfer money from:'. A table lists the available accounts:

Financial Institution	Account	Balance	Status
<input checked="" type="radio"/> Chase	X0000	\$100.00 as of 02/28/2022 5:41 PM EST	Verified

Below the table, there is a '+ Add Account' link and a blue 'Continue' button. The background of the application is a photograph of a two-story house with a stone and brick facade, a two-car garage, and a 'FOR SALE' sign in the front yard.

# 10

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.

**My Account**

**Bank Account**

**Transfer History**

**Message Center**

**Log Out**

**Contact support**  
support@paymnts.io  
1-888-921-1090

**Transfer Details**

What kind of transfer would you like to make?

Earnest Money Deposit for Purchase

Cash to Close for Refinance

Other

Please enter the property address and any optional notes:

**Property Address Related To The Transfer**

Address 1

Address 2

City

Alabama

Zip code

**Notes (Optional)**

How much do you want to transfer?

# 11

Review your transfer details if all of the information is correct please click "Make Transfer".

My Account

Bank Account

Transfer History

Message Center

Log Out

Contact support  
support@paymnts.io  
1-888-921-1090

**Blue Pointe Title Agency**

## Review

Please confirm that the information below is correct before continuing.

**Transfer From:** Chase Account X0000

**Transfer To:** Blue Pointe Title Agency, LLC  
126 E Church St.  
Adrian, Michigan 49221

**Details**

Transfer Date	Purpose	Subject Property	Note
02/28/2022	Earnest Money Deposit For Purchase	123 Street Charlotte, North Carolina 28209	

Earnest Money Deposit For Purchase Amount \$1.23

**TRANSFER TOTAL AMOUNT**

**\$1.23**

< Back Make Transfer

# 12

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

**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** Chase Account X0000 → **To** Blue Pointe Title Agency, LLC.  
126 E Church St.  
Adrian, Michigan 49221

**Details**

Transfer Date	Purpose	Subject Property	Note
02/28/2022	Earnest Money Deposit For Purchase	123 Street Charlotte, North Carolina 28209	

Earnest Money Deposit For Purchase Amount \$123

**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:

Add email address

Add email address

Add email address

Add email address

# 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!

