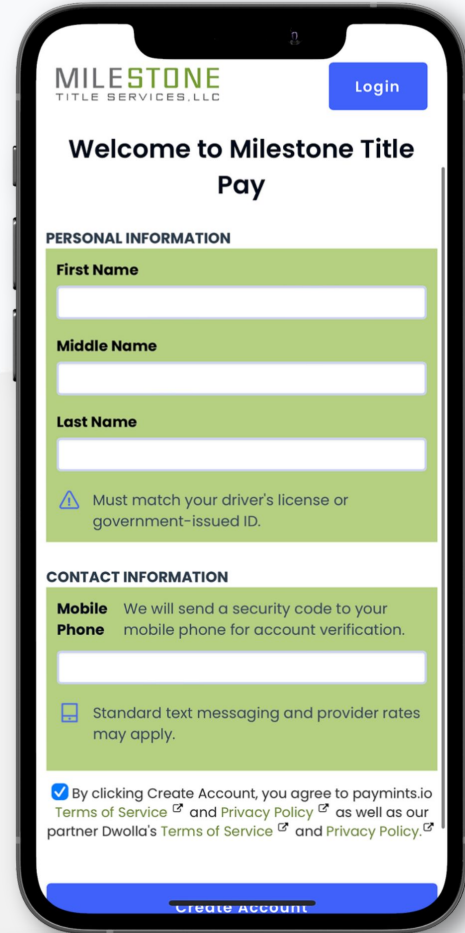




Client Transfer Instructions

[Learn More](#)



1

Start by going to milestone.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

MILESTONE
TITLE SERVICES,LLC

Login

Welcome to Milestone Title Pay

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.

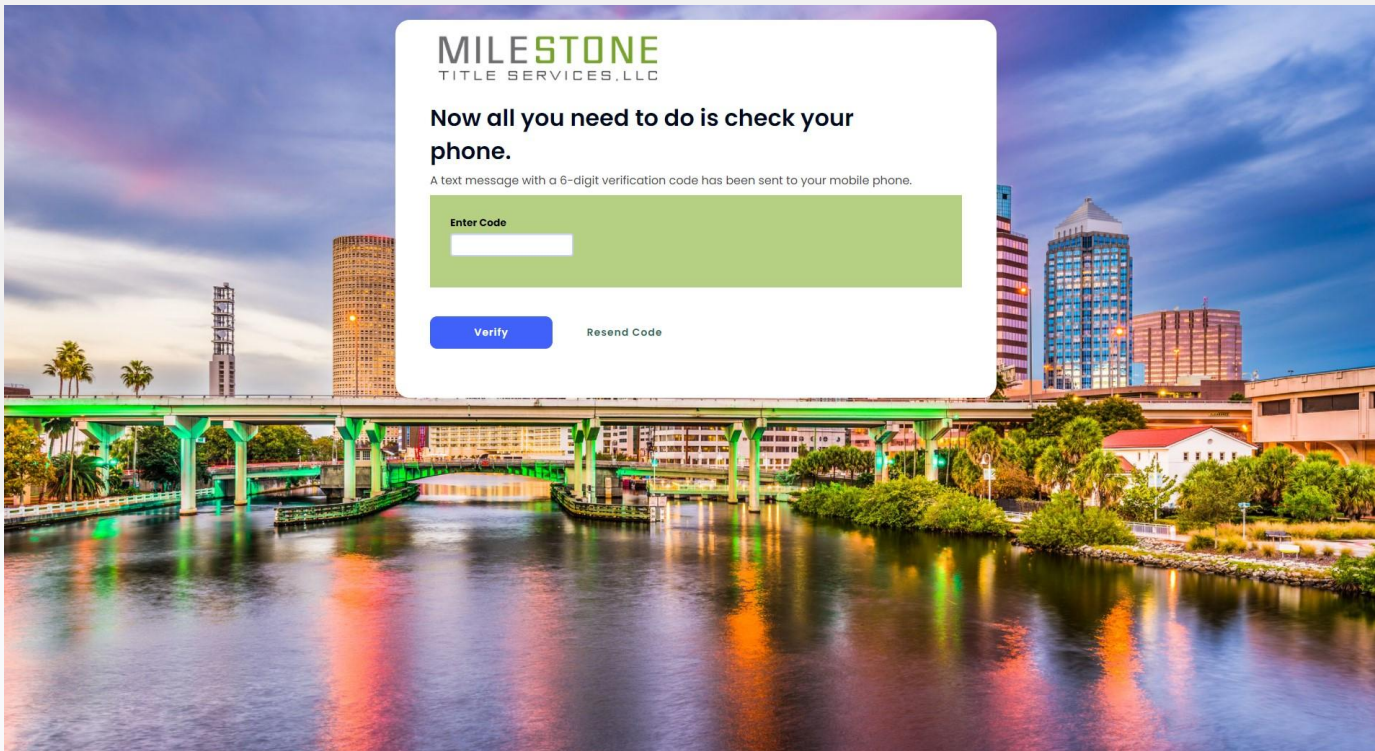
By clicking Create Account, you agree to [payments.io Terms of Service](#) and [Privacy Policy](#) as well as our partner Dwolla's [Terms of Service](#) and [Privacy Policy](#).

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.

The screenshot displays a user interface for Milestone Title Services, LLC. On the left is a blue navigation sidebar with the following items: My Account, New Transfer, Bank Account, Transfer History, Message Center, Log Out, and Contact support (with email support@paymints.io and phone number 1-888-921-1090). The main content area features the company logo and a message: "Your account has been verified, Lucas." Below this, it states: "Now we need to verify your social security number and date of birth, and then we'll be ready to connect to your bank." The form contains four sections: "Social Security Number" with a text input field and an eye icon; "Date of Birth" with a date picker input field; "Email Address" with a text input field; and "Address Associated with Bank Account" with four input fields for Address 1, Address 2, City, and a dropdown menu for State. The background of the interface shows a cityscape with a river and a bridge.

MILESTONE
TITLE SERVICES, LLC

**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

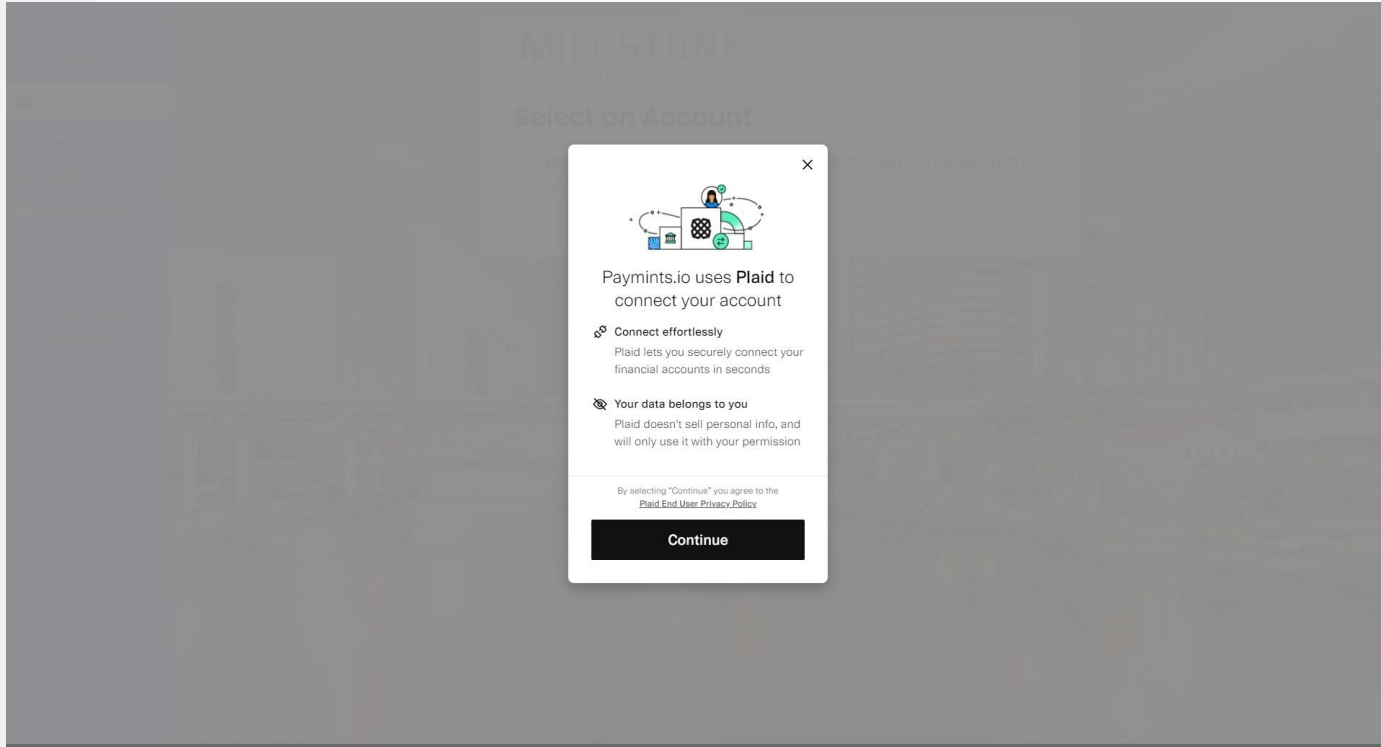
Date of Birth
mm/dd/yyyy

Email Address
Email Address

Address Associated with Bank Account
Address 1
Address 2
City
State

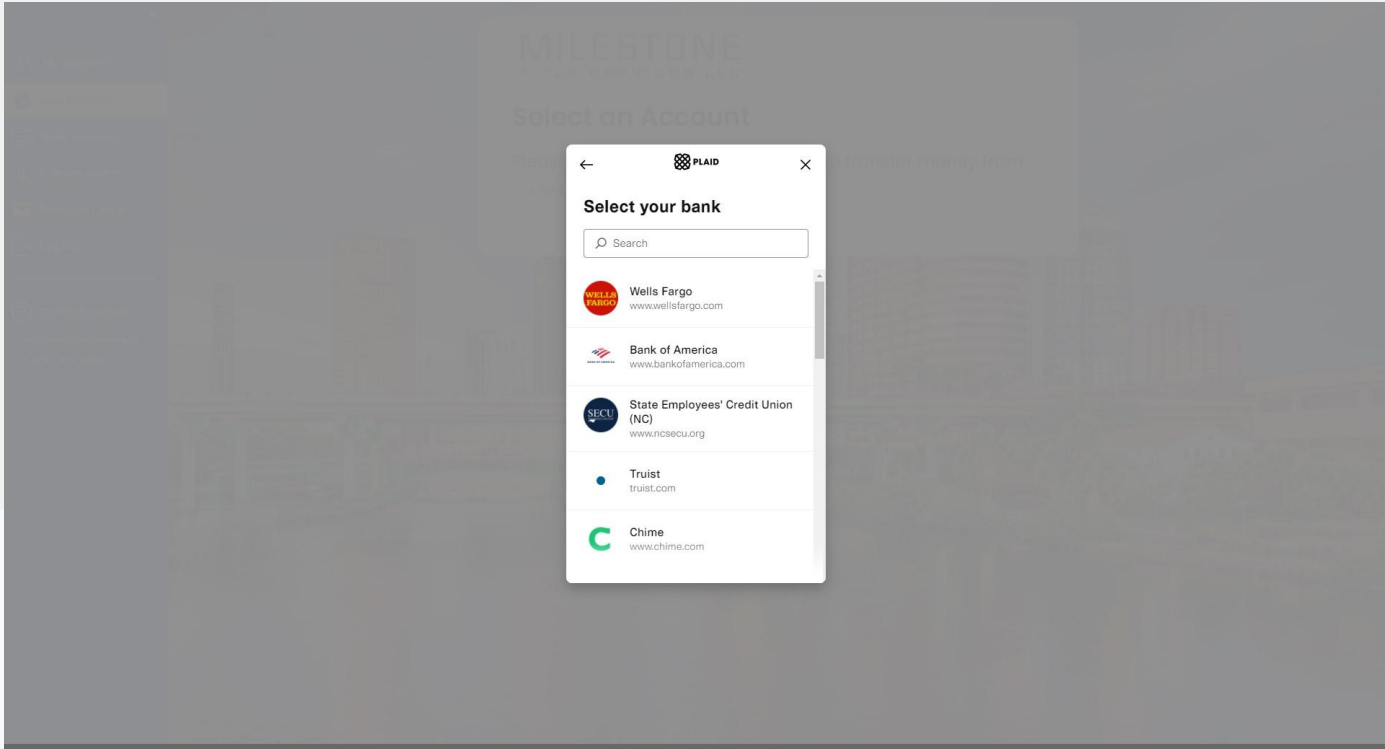
5

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.



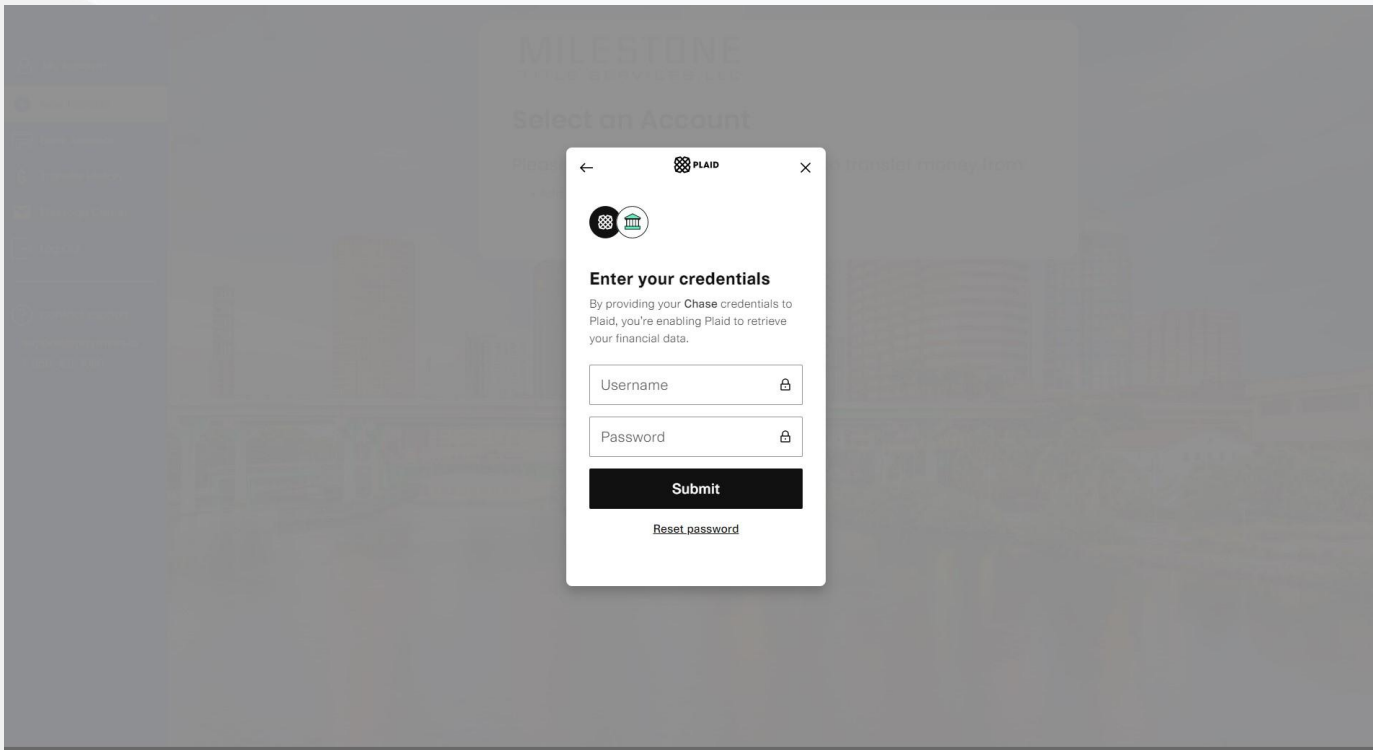
6

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.



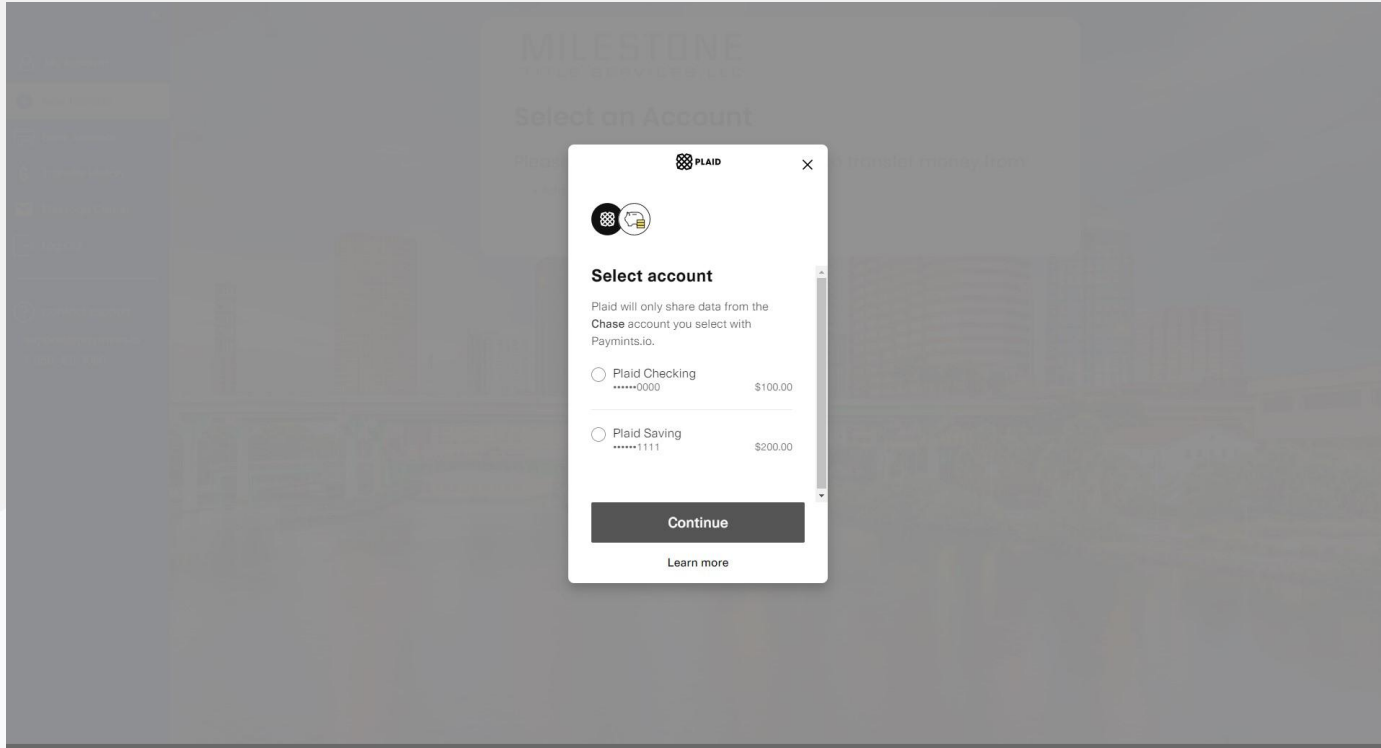
7

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”.

MILESTONE
TITLE SERVICES, LLC

Select an Account

Please select the account you want to transfer money from:

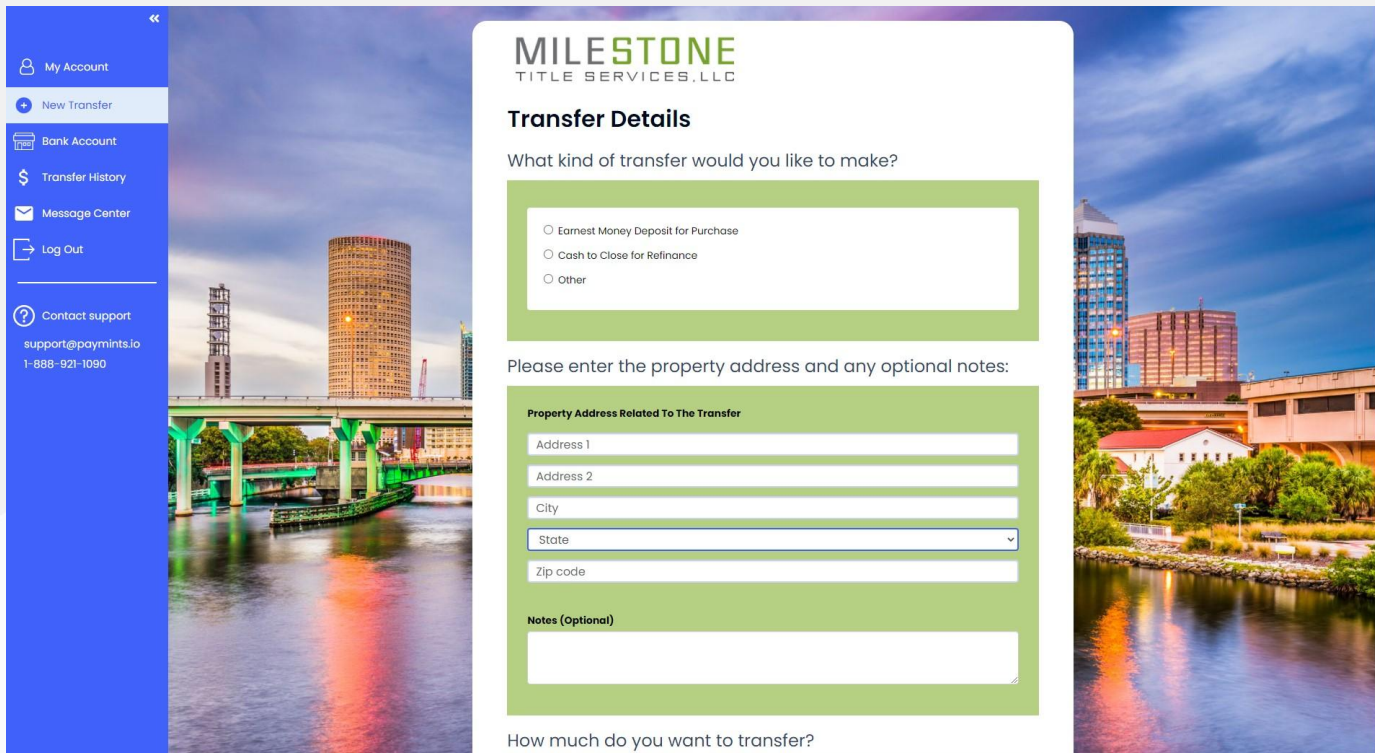
Financial Institution	Account	Balance	Status
<input checked="" type="radio"/> Chase	X0000	\$100.00 as of 04/06/2022 10:12 AM EDT	Verified

[+ Add Account](#) [Continue](#)

My Account
+ New Transfer
Bank Account
Transfer History
Message Center
Log Out
Contact support
support@paymints.io
1-888-921-1090

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.



MILESTONE
TITLE SERVICES, LLC

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

State

Zip code

Notes (Optional)

How much do you want to transfer?

Navigation Menu:

- My Account
- New Transfer
- Bank Account
- Transfer History
- Message Center
- Log Out
- Contact support
support@paymints.io
1-888-921-1090

11

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

MILESTONE
TITLE SERVICES, LLC

Review

Please confirm that the information below is correct before continuing.

Transfer From: Chase Account X0000 → **Transfer To:** Milestone Title Services, LLC
14310 N Dale Mabry Hwy, #200
Tampa, Florida 33618

Details

Transfer Date	Purpose	Subject Property	Note
04/06/2022	Earnest Money Deposit For Purchase	123 Street Charlotte, North Carolina 28209	

Earnest Money Deposit For Purchase Amount \$51.00

TRANSFER TOTAL AMOUNT
\$51.00

< Back **Make Transfer**

12

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

MILESTONE
TITLE SERVICES, LLC

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** Milestone Title Services, LLC
14310 N Dale Mabry Hwy
200
Tampa, Florida 33618

Details

Transfer Date	Purpose	Subject Property	Note
04/06/2022	Earnest Money Deposit For Purchase	123 Street Charlotte, North Carolina 28209	

Earnest Money Deposit For Purchase Amount \$51.00

TRANSFER TOTAL AMOUNT
\$51.00

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 or 1-888-921-1090

Enjoyed your transfer experience?
Please let us know & tell a friend!

