

In the words of Plaid:

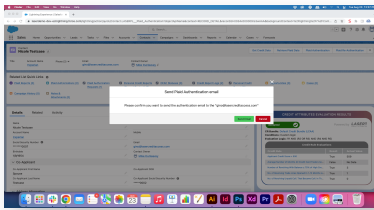
THE PROBLEM

Most lenders struggle to gain a holistic picture of their applicants due to the amount of work and time it takes to collect income information, account balances, and asset history. It's also a cumbersome process to get borrowers to connect their bank accounts to receive capital and repay loans.

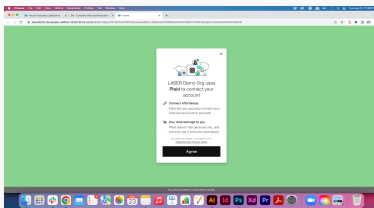
THE SOLUTION

Plaid provides borrowers with an easy, streamlined loan experience while giving lenders access to the user-permissioned bank, payroll, and document uploaded data they need to make informed lending decisions.

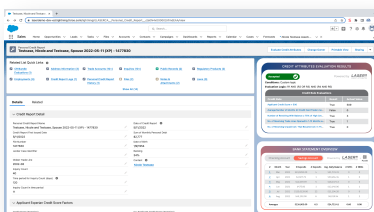
With LASER Financial Account Access, you can:



Authenticate a Customer's Plaid Authorization via email with the click of a button – directly within Salesforce – or automate this step from your website



After consent has been give by the Customer, immediately retrieve their bank data, broken down by Plaid Account name



Re-Authenticate and retrieve the most up-to-date information whenever you want, and customize the timeline of data you are pulling

#	Month	Year	\$ Deposits	# Deposits	Avg. Daily Balance	# NDBs	# NIBDs
1	Mar	2021	\$23,029.00	5	\$21,731.31	0	0
2	Apr	2021	\$2,027.72	1	\$30,466.34	1	0
3	May	2021	\$41,039.39	5	\$48,137.13	0	0
4	Jun	2021	\$475.00	1	\$12,140.00	1	1
5	Jul	2021	\$123,0139.00	22	\$12,139.30	0	0
6	Aug	2021	\$45,192.00	0	\$8,019.94	1	2
Averages			\$124,003.09	6.5	\$24,715.41	0.60	0.08

Using the app's built-in custom component, see aggregated account information at a glance in Salesforce from wherever you wish