

STONECASTLE

Linking your banking account is fast & easy!

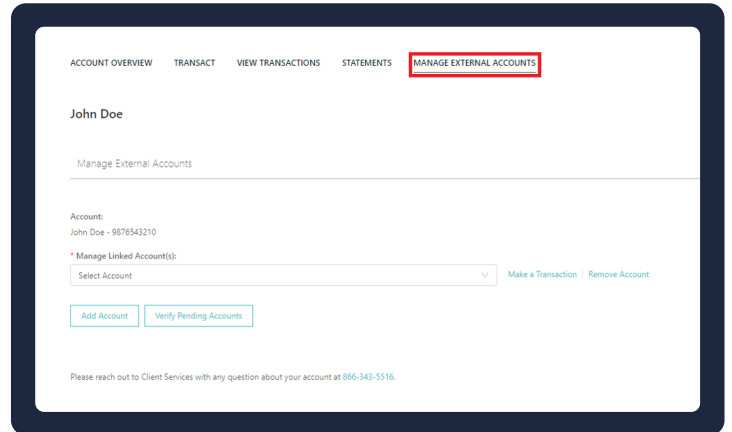


Plaid Manual **Guide**

Microdeposit Process for Linking an ACH Account

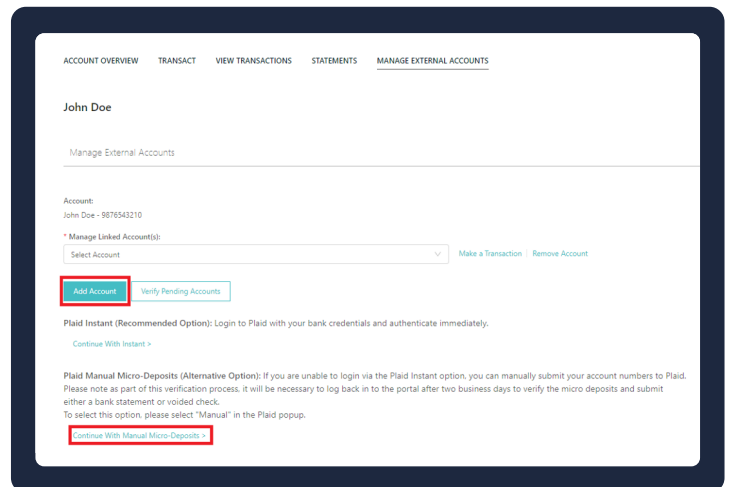
1

Navigate to the Manage External Accounts tab



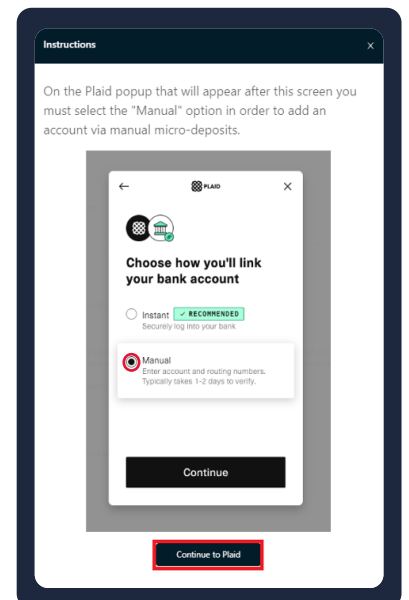
2

Select on add Account and then Continue with Manual Micro-Deposits



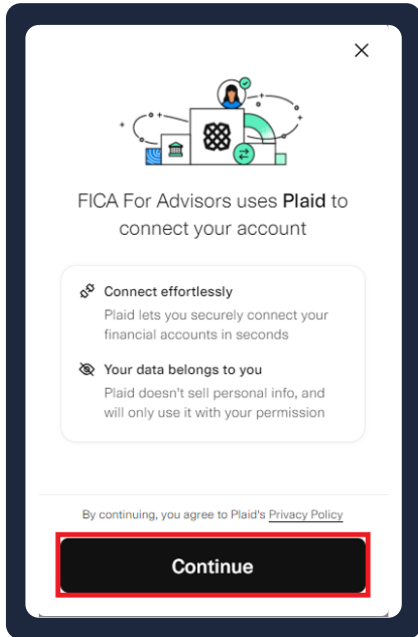
3

Select Manual then Continue to Plaid after the 5 second timer has elapsed.

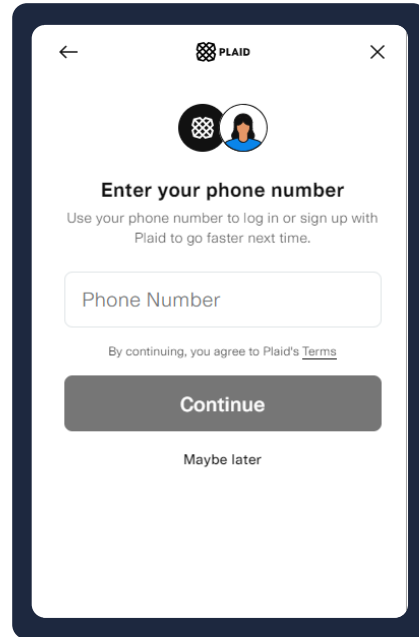


4

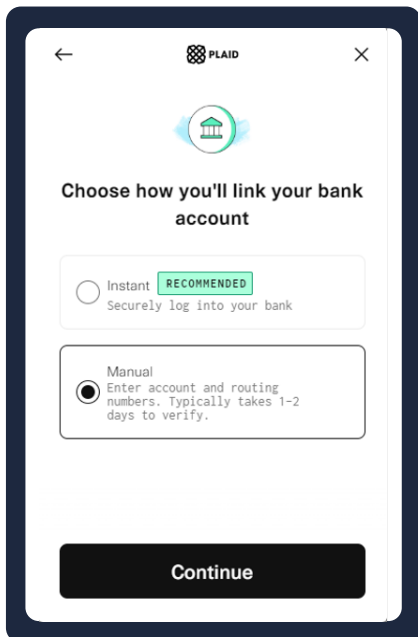
Link to Your Bank Account for ACH Transfers



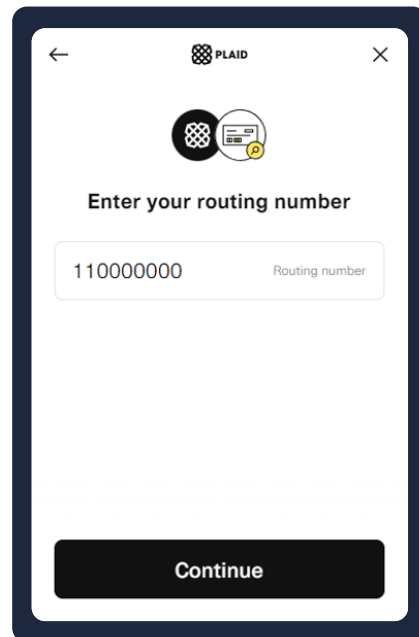
Select Continue



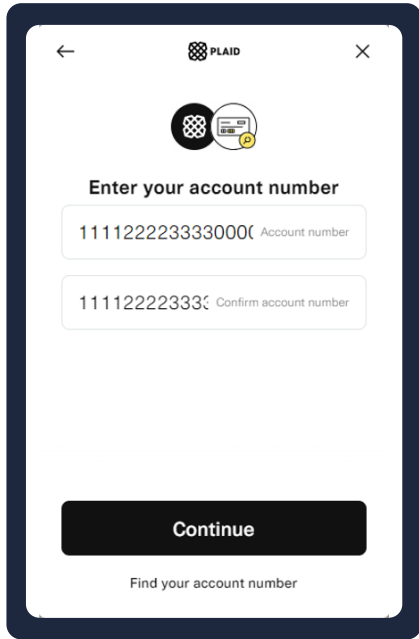
Optional: Enter your Phone Number to expedite future bank connection requests



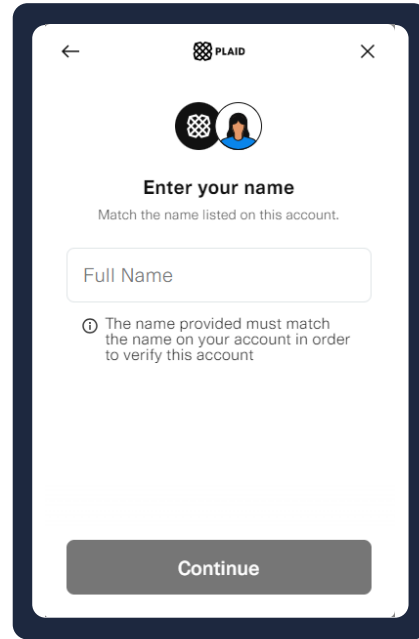
Select Manual



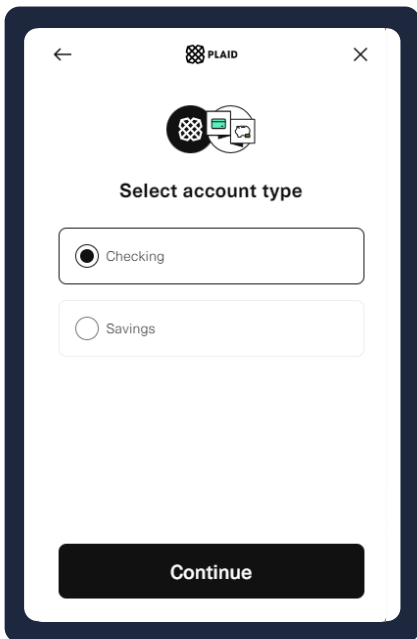
Enter your routing number (ABA number from the bank account you want to link)



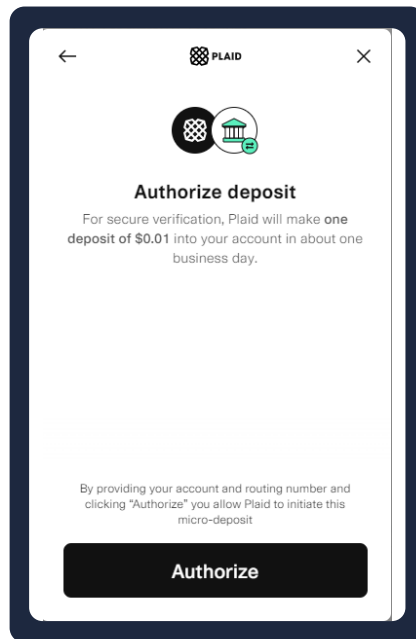
Enter your account number twice and select confirm



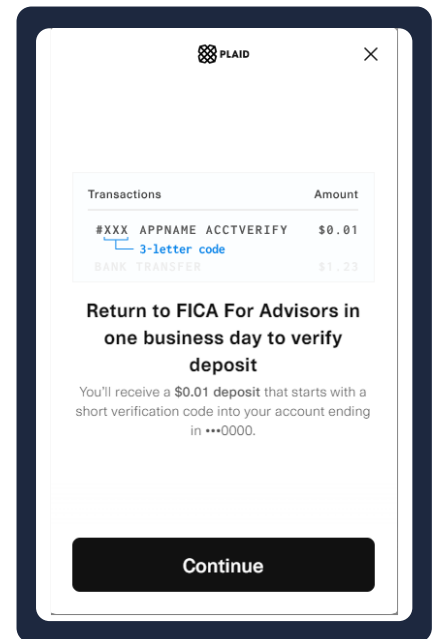
Enter the name on the bank account (Ex. John Doe)



Choose the account type

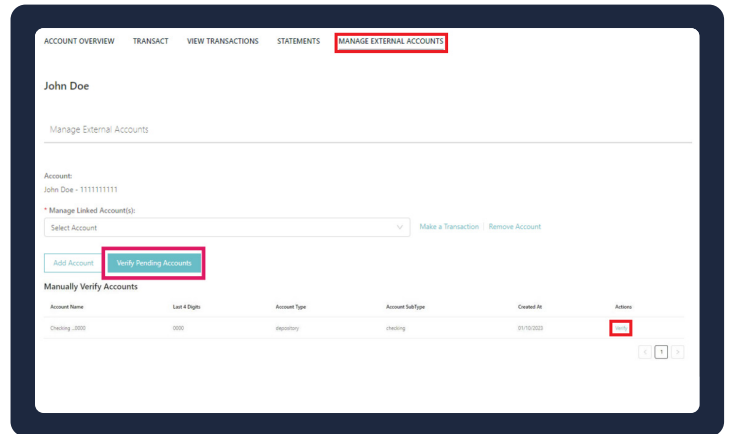


Select Authorize. Please note, Plaid will make a \$.01 deposit into your account in 1-2 business days.



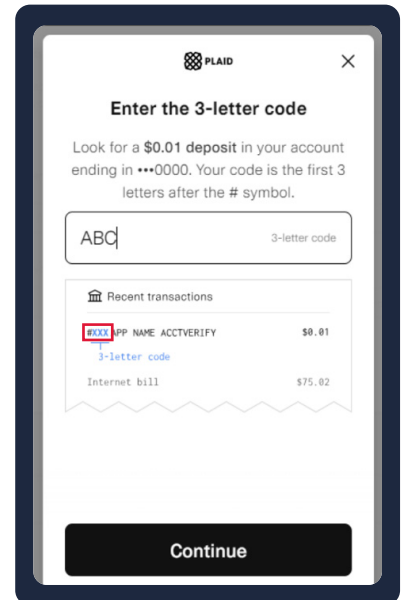
5

After 1-2 business days, return to the [Manage External Accounts](#) tab to verify your pending account



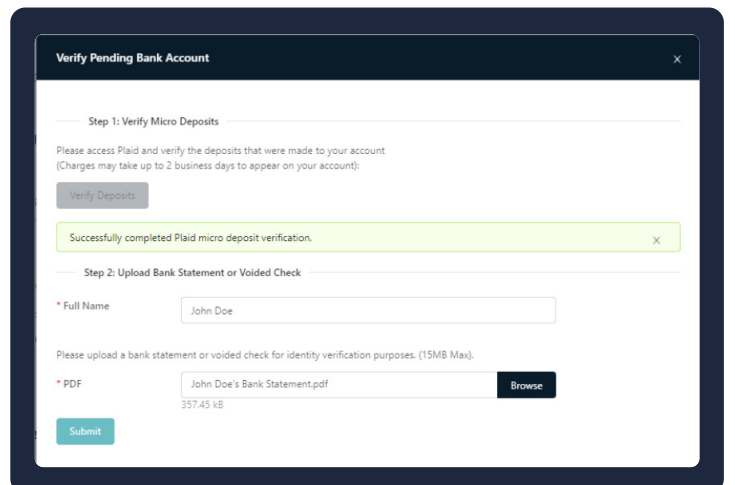
6

Enter the 3-letter code from the \$0.01 deposit found in your bank statement

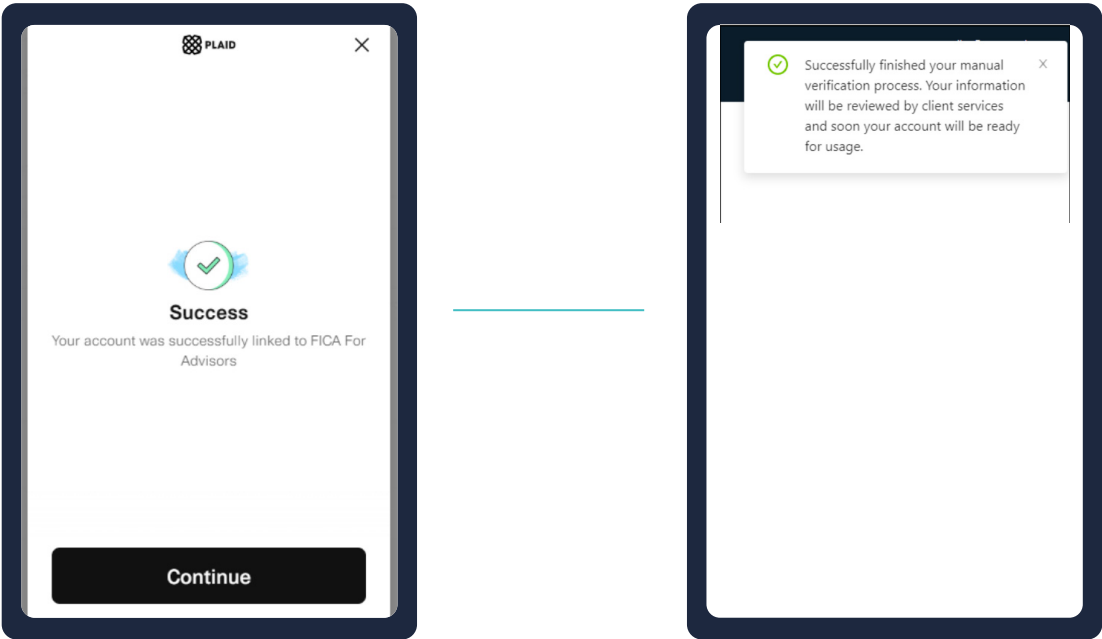


7

Upload a copy of a bank statement/voided check



Your Bank Account was Successfully Linked



You will then see the above notifications

Contact your financial advisor for additional information on setting up your account.