Getting Started with FloatMe

In this guide, you will learn how to set up your FloatMe account, what you'll need to get started, and some helpful tips and tricks.

What you'll need

To get started, you will need the following:

- A smartphone capable of sending and receiving data and text messages
- A checking account where you have your paycheck sent via direct deposit (so we can send and recollect floats)
- The login information for the account (username and password)
- The Debit card associated with the account (so we can send floats quickly and collect your subscription fee)
- Your primary home address
- Your cell phone number
- Your primary email
- An **Access Code**

NOTE: If you have not received an access code, you may still either be on the wait list or need to sign up.

Getting Started

To begin, you will need to go to either the Google Play Store or iOS App Store on your phone and download the latest version of the FloatMe App. Once downloaded, you should see the FloatMe **Splash Screen.**

Click **Sign Up** to begin the process of creating your account.

![floatme](floatme logo)

Basic Information

You will need to input the following information:

- Your legal first name as it appears on your State ID
- Your legal last name
- The email address you used to request an access code
- A cell phone number capable of receiving SMS (text) messages

Note: SMS is sometimes used to verify your identity

Password and Access Code

Now that you have an access code, you can create a password. Your password should be at least **8 characters** and contain **letters, numbers, and special characters** to ensure your account security.

Once your password is created and matches, you should enter the access code you received, review the Terms and Conditions, and hit **Create Account**

![floatme]

Address

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Let's get some more information about you.

Address

City

State
AL ▾   Zip Code

Continue

◀   ⬤   ■

Enter in the mailing address for your primary residence. You should not enter a P.O. Box or work address.

Once done, click **Continue**

Plaid

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FloatMe uses Plaid to link your bank

✓ Secure
   Transfer of your information is encrypted end-to-end

✓ Private
   Your credentials will never be made accessible to FloatMe

CONTINUE

By selecting "Continue" you agree to the Plaid End User Privacy Policy

◀   ⬤   ■

FloatMe uses a 3rd party system call **Plaid** to connect with your bank account. We use **Plaid** to help keep your account safe and secure- we never have to store your account numbers or routing numbers in our systems.

Plaid uses the same 256-bit encryption that most banks do, meaning that it is very secure. Most finance apps and software currently use **Plaid** to connect to more than 9,600 different financial institutions.

Once you're ready, you can select **Continue**

⌐floatme

Linking your account

From here on, you can search for your bank or credit union from among the ~9,600 supported. If you cannot find your bank or credit union, it may not be supported yet by Plaid. We're happy to double check with them!

Once you select your bank or credit union, **Plaid** will have you sign in and verify your information.

Note: Make sure you connect the bank account where you receive your paycheck via direct deposit

Debit Card Information

FloatMe uses your debit card to process **Instant Floats.** To make sure this works, you'll need to use the debit linked to your bank account where you receive your paycheck via direct deposit.

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Please add your debit card for instant advances.

Card Number

Exp Month
01

Exp Year
2019

CVV

Continue

Stash Account

A **FloatMe Stash Account** is a new feature our team is working on- an account that is **FDIC Insured** and helps you **automatically save money** and achieve financial **goals.**

Though it isn't ready yet, you can choose to set a goal on this page- we suggest either $100, $500, $1000, 1 months of expenses, or 3 - 6 months of expenses to start! (Whichever is the smallest amount you don't have saved yet)

Once you set a goal, select **Continue**

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Let's create your emergency stash account.

Tell us your emergency savings goal.

$0/$0.00

$ 0.00

Continue

^ ∨   Done

Select your Income

This is important since it verifies that you are employed and eligible to receive **Floats** and nano-advances. Select your most recent paycheck and from your current employer.

Note: If you do not see your most recent paycheck please contact FloatMe Support. We can manually verify your income.

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Almost Done! Select your main income.

GUSTO PAY 395917 PPD ID: 1453942850 $906.07	2019-09-13
GUSTO PAY 300068 PPD ID: 1453942850 $906.05	2019-08-30
ALAMO COMMUNITY PAYROLL PPD ID: 3746002173 $3,076.39	2019-08-15
GUSTO PAY 213155 PPD ID: 1453942850 $906.07	2019-08-15
GUSTO PAY 150834 PPD ID: 1453942850 $906.05	2019-08-01

Continue

Verify your Income Details

In this section, you will verify that the income you selected is correct and verify your **Pay Type** and **Pay Frequency.**

For your **Pay Type,** you should select **Salary** if you are paid a set amount every paycheck based on a yearly amount. You should select **Hourly** if your pay is determined by how many hours you work each week.

For your **Pay Frequency** you should select one of the following options:

- **Weekly** if you are paid once a week
- **Bi-weekly** if you are paid every other or every two weeks
- **Semi-monthly** if you are paid twice each month
- **Monthly** if you are paid once each month

If none of these options apply, please contact FloatMe Support.

14:36

Verify income details.

Employer Name
GUSTO PAY 395917 PPD ID: 14539428

Amount
$906.07

Pay Type
Hourly

Pay Frequency
Bi-Weekly

Confirm Details

Once you confirm your details, you're ready to go! You can access your account information, take out Floats, and more, all from the home screen of the app.

 Welcome to the **FloatMe Community!** Your financial journey starts **now.**