



Advent **eModal**<sup>®</sup>

# FBO (For Benefit Of) Registration Process

Version date: January 2023

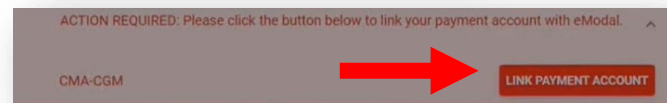
# FBO (For Benefit Of) Registration Process

Advent eModal's FBO (For Benefit Of) functionality enables a secure transfer of funds. As someone with fiduciary responsibility for your organization and signer of your financial accounts, you will be promoted to provide company and banking information. Follow these steps to set up your account.

From the home page navigate to **Administration** and **Company Profile**



On the **Company Profile Page** select the **Link Payment Account Information** button on the notification at the top of the page.

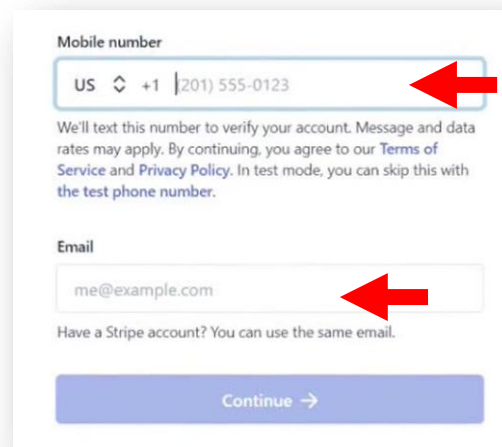


A new tab will open with eModal's Financial Services portal powered by Stripe.

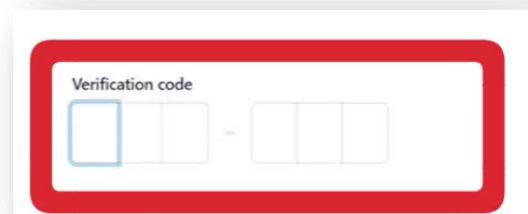
You will be prompted to set up the second entry of your multi-factor identification.

**Enter your mobile number and email.**

Then select **Continue**.

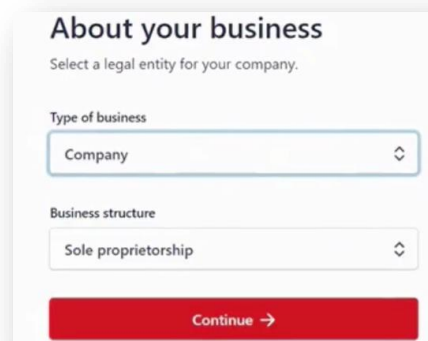
A screenshot of a Stripe verification form. It has two input fields: "Mobile number" (containing "US +1 (201) 555-0123") and "Email" (containing "me@example.com"). Red arrows point to both fields. Below the fields is a blue "Continue" button with a right-pointing arrow. Text below the fields explains that a text message will be sent for verification.

You will be sent a verification code via text.  
**Enter the code.**

A screenshot of a verification code input field. It is titled "Verification code" and contains a red-bordered box with four empty input slots for digits, separated by a hyphen.

You will be brought to a series of prompts asking you to provide business information including the type of business, business structure, legal business name, Employer Identification Number (or EIN Number), address, phone number, etc.

**Enter the requested information.**

A screenshot of a form titled "About your business". It asks to "Select a legal entity for your company." and has two dropdown menus: "Type of business" (set to "Company") and "Business structure" (set to "Sole proprietorship"). A red "Continue" button with a right-pointing arrow is at the bottom.

You will be prompted to **provide your bank account information** including the routing number and account number.

### Add your bank to receive payouts

A payout is the transfer of funds from Stripe to your bank account.

123456789 000123456789 1234

**ROUTING**

Routing number

110000000

Account number

000123456789

Your bank account must be a checking account.

Once the information is entered, select **Agree and Submit**.

By clicking Agree & Submit, you agree to the [Connected Account Agreement](#).

**Agree & Submit**

**Note:**  
After submitting the information, it can be edited by selecting the Link Payment Account Button again and then clicking on the pen icon.

### Verification summary

Modify the details of your business.

**BUSINESS DETAILS**

Test  
emodal.com  
address\_full\_match  
Miami, FL 07974 US

Other information provided  
EIN, DBA, Phone, Industry

**MANAGEMENT AND OWNERSHIP**

John Doe  
Account representative, Owner, and Executive

test@adventintermodal.com  
Born on January 1, 1901  
address\_full\_match  
Miami, FL 07904 US

Other information provided  
SSN, Job title, Phone

