

Hello [FIRST NAME],

It was a pleasure to speak with you today. As I mentioned during our call, we are excited to have you with us at Oak Street Funding, and I am looking forward to working with you as your dedicated Account Manager.

Below is a summary of the details we discussed and the next steps to ensure your account transition is seamless.

1. **MyStreet Portal Access** - MyStreet is our secure platform for managing your account and uploading required financial documents. If you would like to view a brief video to see what the MyStreet portal looks like, please click [here](#).
  - **Registration:** You will receive an automated registration email for MyStreet shortly. Please be sure to set up your account within 7 days as this link does expire. Your username is the email address that you confirmed with me on our call today. MyStreet will walk you through the rest of the registration process.
  - **Security:** To protect your data, please use the MyStreet Document Repository for all financial submissions rather than email.
  - **Action Required:** [I have attached the Borrower Authorization Form / I have noted your request for additional users]. Please return this form signed if you need to grant portal access to other members of your team or if you would like anyone to be included on email reminders.
2. **Payment & ACH Information** - We confirmed that your loan payments will continue via ACH from your account ending in [Last 4 Digits].
  - [Optional – include if a change is needed]: **Action Required:** Please find the Banking Instructions Template attached. Please complete, sign, and upload to the MyStreet Document Repository with a voided check or bank letter so that I can update your records.

As I continue to familiarize myself with your loan(s), I may be reaching out again soon to request any financial reporting or collateral requirements outlined in your loan documents.

If you would like to view any of our resources or just learn more about Oak Street, please visit our [website](#). You have access to our blog, recordings of past webinars, and several industry-specific tools that might interest you.

For any day-to-day inquiries regarding your loan, I will be your primary point of contact. If you have any questions as you settle in, please don't hesitate to reach out. You can reach me at [SENDER EMAIL] or [SENDER PHONE].

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