

[Date]

[Borrower Name]
[Address Line 1]
[Address Line 2]
[City, State, Zip Code]

Subject: Welcome to [Lender Name] - Action Required to Set Up Your Account

Dear [Borrower Name],

Congratulations! Your student loan refinance application has been approved and your new loan is now active. We are excited to help you manage your student debt more effectively.

Your New Loan Details:

- Loan Number: [Account Number]
- Principal Balance: \$[Amount]
- Interest Rate: [Rate]%
- First Payment Due Date: [Date]

Step 1: Set Up Your Online Account

To manage your payments and view your statements, please register your online portal account at:

[\[Website URL\]](#)

Step 2: Enroll in Auto-Pay

Never miss a payment by setting up automatic recurring transfers. [Optional: Enrolling in Auto-Pay may qualify you for a [Rate]% interest rate reduction.]

Step 3: Verification of Payoff

We have sent the payoff funds to your previous servicer(s). Please continue to monitor those accounts until you receive confirmation that your prior balances are \$0.

If you have any questions, our customer service team is available at [Phone Number] or via email at [Email Address].

Sincerely,

[Sender Name]
[Title]
[Lender Name]