



Bank Statement Submission Process



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CORRESPONDENT

Angel Oak Correspondent Lending

Angel Oak is committed to your success. Our vision and expertise are dedicated to you and your clients.

Step 1: Go to the Angel Oak Correspondent website at www.angeloakcorr.com. Go to **RESOURCES & TOOLS** on the upper menu bar. (website works best with Google Chrome)

Bank Statement Submits

Correspondent Programs

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Step 2: Click on Bank Statement Submission



Profile



Bank Statements



Upload and Submit

Company*	<input type="text" value="Company name"/>
Operations Contact*	<input type="text" value="Operations contact"/>
Phone*	<input type="text" value="(123) 456-8910"/>
Email*	<input type="text" value="name@company.com"/>
Borrower*	<input type="text" value="Borrowers full name"/>
Correspondent Loan Number	<input type="text" value="Correspondent loan number"/>
	<input type="checkbox"/> Individual(s) is/are self-employed
	<input type="checkbox"/> Has been more than 2 consecutive years self-employed in the same business
Name of Self-Employed Business*	<input type="text" value="Business name"/>

Next

- Enter the information where you see the asterisk; Correspondent Loan Number is optional
- Check the box if the individual(s) self-employed
- Check the box if the individual(s) have been consecutively self-employed for 2+ years
- Enter exact name of self-employed business
- **Click NEXT** to continue to the next page

Step 3: Bank Statements



Type of Bank Statements* Personal Bank Statements Business Bank Statements

Bank Statement History* I have available for upload:
 12 Months of bank statements 24 Months of bank statements

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- Answer “What type of Bank Statements”
- Answer “Bank Statement History”

Step 4A: Personal Bank Statements



Type of Bank Statements* Personal Bank Statements Business Bank Statements

Bank Statement History* I have available for upload:
 12 Months of bank statements 24 Months of bank statements
Note: A minimum of the most recent 12 months consecutive statements should be uploaded or the loan may not be eligible.

Last four digits of the Account #

Names Match* All individuals listed on the bank statements match the potential applicants
 Yes No

List all individuals

Separate Business Acct* Do you have a separate operating business account in the business name?
 Yes No

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Personal

- Enter Last 4 digits of the account number
- Answer “Do all individuals on the statements match the potential applicants?”
- List all individuals
- Answer “Do you have a separate operating business account?”
- If yes proceed to next page; If no enter the business expense factor percentage factor and answer if there are additional employees”
- **Click NEXT** to continue to the next page
- Upload bank statements
- Add Comments that might be helpful
- **Click on SUBMIT**
 - If you receive an error message you will quickly receive an email with instructions on how to proceed

Step 4B: Business Bank Statements



Type of Bank Statements* Personal Bank Statements Business Bank Statements

Bank Statement History* I have available for upload:
 12 Months of bank statements 24 Months of bank statements
Note: A minimum of the most recent 12 months consecutive statements should be uploaded or the loan may not be eligible.

Last four digits of the Account #

Names Match* The name of the business matches the name of the business on the bank statements
 Yes No

Percent Owned* What percentage of the business does the individual own? %

Business Expense* Business expense percentage factor %

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Business

- Enter last 4 digits of the account number
- Answer “Does the name of the business match the name of the business on the bank statement?”
- Answer “What percentage of the business does the individual own?”
- Enter business expense percentage factor
- **Click NEXT** to continue to the next page
- Upload bank statements
- Add Comments that might be helpful
- **Click on SUBMIT**
 - If you receive an error message you will quickly receive an email with instructions on how to proceed



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