

Form Requirements for Active Seller/Service



We value your partnership and will work with your organization to ensure that there is no disruption in your ability to conduct business with us. Please utilize this schedule as a reference to get you started and continue to work with your Freddie Mac account team to ensure that all necessary materials are received in accordance with your business designation.

As an approved **Freddie Mac Seller/Service***, your organization is required to keep all forms current and up to date. Maintaining accurate documentation helps ensure compliance with our requirements. While this document is not comprehensive of all forms, it outlines the forms that require timely updates. The decision to update the forms remains at the discretion of each business area. Additional information with respect to each form may be found in our **Single-Family Seller/Service Guide (Guide)****.

Please note that in certain circumstances, such as organizational changes or changes in document custodians, custodial accounts or when data is outdated due to inactivity, you may be required to immediately submit new forms on an as-needed basis.

Ongoing Requirements for Seller/Service			
Due Date	Form Name and Link	Description	Submit To
Annually Within 90 days after the end of Seller/Service's fiscal year (Typically, March 31).	Annual Certification and Change and Activity Reporting (UCount®)	Required for all Seller/Service to submit on an annual basis (as defined in Guide Section 2101.10 & Guide Section 2101.11). Report becomes available in UCount on December 31 each year. You may expect to receive an email from Freddie Mac Single-Family (singlefamily@infofreddiemac.com) in October/November notifying you of changes to the Annual Certification Report. Authorized Representatives will also receive Annual Certification Report reminders from UCOUNT@freddiemac.com .	UCount
Biennially Every 2 years based on last certification date.	Form W-9 (Revised March 2024 version or newer)	Federal Taxpayer Identification Number (TIN) document. In order to onboard the latest 2024 W-9 form released in September 2024, Seller/Service who have not already submitted the new form with their biennial Counterparty Authorization documents will be required to submit it with new or modified wire instructions.	Counterparty Authorization
Every 2 / Every 4 Years Seller/Service must renew and update the Form 988SF every two years and its Resolution every four years, based on last submission date (if there are no changes).	Form 988SF	Certificate of Incumbency for a Bank, Savings Bank, Savings and Loan Association, Credit Union, Corporation or Limited Liability Company. Sellers/Service must provide the Form 988SF to Freddie Mac, together with a board Resolution from the Seller's/Service's governing body, which shows that the Authorized Employees identified on the Form 988SF are approved to issue payment instructions to Freddie Mac. Authorized Employees will receive reminders from Counterparty_Authorization@freddiemac.com .	Counterparty Authorization

* "Seller/Service" is a collective term that refers to Sellers, Service and Seller/Service.
** The Freddie Mac Seller/Service Guide (Guide) may be accessed [here](#). The authoritative version may be found at [AllRegs](#), but a subscription is required.

Form Requirements for Active Seller/Servicers



Every 2 / Every 4 Years Seller/Servicer must renew and update the Form 989SF every two years and its Resolution every four years, based on last submission date (if there are no changes).	Form 989SF	<p>Certificate of Incumbency for Limited Partnerships.</p> <p>With this form, Sellers/Servicers must provide to Freddie Mac together with a Resolution of the Seller’s/ Servicer’s governing body, which empowers certain Authorized Employees to issue instructions for Freddie Mac to transfer funds or securities in connection with the sale and/or Servicing of residential home loan Mortgages.</p> <p>Authorized Employees will receive reminders from Counterparty_Authorization@freddiemac.com.</p>	Counterparty Authorization
Ongoing Requirements for Special Designations			
Due Date	Form Name and Link	Description	Submit To
Quarterly 30 days after March 31, June 30, September 30, and 60 days after December 31.	Form 1055 (MBFRF / Mortgage Bankers and Housing Finance Agencies ONLY)	Sample of the financial reporting form that each Seller/Servicer that is a mortgage banker, must complete and submit.	MBFRF Online
1st and 2nd Months of Each Fiscal Quarter No later than 30 days after the end of each reporting month.	Form 1055A (MBFRF / Mortgage Bankers ONLY)	Monthly financial reporting form that Large Non-Depository Institutions (as defined in Guide Section 2101.2) and specifically identified Seller/Servicer mortgage bankers must complete.	MBFRF Online
Every 2 / Every 4 Years Seller/Servicer must renew and update the Form 988SF-HFA every two years and its Resolution every four years, based on last submission date (if there are no changes).	Form 988SF-HFA (Housing Finance Agencies ONLY)	<p>Certificate of Incumbency for State Housing Finance Agencies.</p> <p>With this form, Seller/Servicers that are State Housing Finance Agencies designate Authorized Employees who are approved to provide Freddie Mac with payment instructions.</p> <p>Authorized Employees will receive reminders from Counterparty_Authorization@freddiemac.com.</p>	Counterparty Authorization