

Date / /

Seller/Service Name:

Seller/Service Number:

Please complete this form in its entirety and send the completed form to your Freddie Mac account executive or customer relationship manager. Please enter zeros or "N/A" where applicable. Freddie Mac will use this information to evaluate your request to participate in our [HeritageOneSM](#) offering.

This is a fillable PDF. Save the file to your computer first to enable the fillable function. Hit the "Fill and Sign" icon on the document to fill in the answers. If you need any help when completing this form, please reach out to your Freddie Mac account executive or the Customer Support Contact Center at **800-FREDDIE** for assistance.

Provide a point of contact for all HeritageOne-related communications.

Name

Phone number

Email

Experience – Indicate documented experience in the programs below:

HUD's Section 184 Indian Home Loan Guarantee Program

YES NO

If yes, how many loans originated in the past 24 months?

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USDA's Section 502 Guaranteed Loan Program

YES NO

If yes, how many loans originated in the past 24 months?

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VA's Native American Direct Loan Program

YES NO

If yes, how many loans originated in the past 24 months?

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Fannie Mae's Native American Conventional Lending Initiative (NACLI)

YES NO

If yes, how many loans originated in the past 24 months?

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Mortgages secured by properties located within tribal areas and, if possible, made to borrowers that are enrolled members of Native American tribes.

YES NO

If yes, how many loans originated in the past 24 months?

#

No Experience – Provide justification (e.g., other related experience, vendors, partnerships, etc.) that could be considered an acceptable exception(s) to documented experience originating mortgages under the programs listed above.

If you have indicated experience in any of the above programs, check N/A.

N/A

If no previous experience, use the space below to document experience originating leasehold mortgages or other types of similar mortgages where the mortgage is secured by a lessee's leasehold interest, or other related experience. Also, if, applicable, indicate the use of in-house staff, third-party vendors or partnerships with underwriting expertise for properties within tribal areas.

Be sure to include:

- Overall strategy to serve enrolled members of Native American tribes and the **targeted States** you plan to launch HeritageOne
- Specific outreach strategies to promote HeritageOne
- If applicable, include existing relationships with Native American tribes or organizations

Servicing – Released or Retained

Servicing Released

YES NO

NOTE: If yes, servicing of HeritageOne Mortgages will be released to a dedicated specialty servicer designated by Freddie Mac

Servicing Retained

YES NO

Will HeritageOne Mortgages be serviced by a sub-servicer?

YES NO

If yes, provide Sub-Servicer's name

Delivery

If approved to sell HeritageOne Mortgages to Freddie Mac, what is the anticipated launch date?

MONTH DAY YEAR

If unknown, what is the earliest time frame?

Required Training

Management-level employee who oversees mortgage originations or operations (inclusive of underwriting) must complete the HeritageOne training through Freddie Mac's Learning Center. The training is also open to loan officers and/or other personnel. Completion of the training must be evidenced by a copy of the certificate of completion by such management-level employee or attested to by the Seller.

Sellers are also encouraged to review the Appraisal Institute's appraisal training curriculum for performing property valuations in tribal areas.