

Servicing Portfolio Transfer Checklist:

Interim Servicing

When your organization enters into an agreement to provide Interim Servicing for a portfolio of Freddie Mac mortgages, you must complete the appropriate forms and ensure you have access to our servicing-related suite of technology tools so that you are able to perform the following activities:

- Investor reporting and ACH Drafting.
- Custodial account setup and reconciliation.
- Loss mitigation and delinquency management.

Use the following checklist to ensure that you complete the required forms and have access to our suite of mortgage servicing technology tools for your interim servicing portfolios.

If you have any questions after reviewing this checklist, contact your Freddie Mac Servicing Account Manager or 800-FREDDIE for assistance.

Complete Required Forms and System Access		
What You Need to Do	Where to Locate Form(s)	How to Submit the Form(s)
<input type="checkbox"/> Complete the Servicing Technology Tools Sign Up Form, including the S/S number you will subservice, to obtain access to Freddie Mac's suite of mortgage servicing technology products.	Authorized User Roles Form - For Use by Servicers and Servicing Agents. http://www.freddie.mac.com/help/servicing_tool_request/servicing_tool_request_form.html	Submit online.
<input type="checkbox"/> Complete the <i>Workout Prospector</i> [®] Order Form to obtain access to Workout Prospector.	Servicing Technology Tools https://sf.freddie.mac.com/tools-learning/servicing-gateway/our-solutions/workout-prospector	Submit online.
<input type="checkbox"/> Complete Form 902SA, User Roles Form – For use by Servicing Agents only to obtain access to servicing portfolios.	<i>Single-Family Seller/Servicer Guide, Forms section</i> https://guide.freddie.mac.com/app/guide/content/a_id/1001349	Email: Enterprise_Cash_Customer_Setup@freddie.mac.com
<input type="checkbox"/> Complete the Servicing Technology Tools Request form to request access to Attorney Data Reporting (ADR) via Servicing Gateway.	http://www.freddie.mac.com/help/servicing_tool_request/servicing_tool_request_form.html	Submit online.
<input type="checkbox"/> If applicable, obtain access to the Document Management System (Blitzdocs).	Contact your Servicing Account Manager to obtain access to the Document Management System (Blitzdocs).	
<input type="checkbox"/> If applicable, obtain access to the Bypass Solution for Workout Prospector.	Contact your Servicing Account Manager to obtain access to the Bypass Solution for Workout Prospector.	



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Establish Custodial Accounts and ACH Drafting		
What You Need to Do	Where to Locate Form(s)	How to Submit the Form(s)
<p><input type="checkbox"/> Complete the following Letter Agreements if you maintain your custodial accounts with Servicer's own financial institution Eligible Depository:</p> <ul style="list-style-type: none"> Form 1059SF, <i>Letter Agreement for Servicer's Single-Family Principal and Interest, or P&I Disbursement Clearing Custodial Account</i> Form 1060SF, <i>Letter Agreement for Servicer's Single-Family Buydown or Escrow Custodial Account</i> <p>NOTE: You must also send Freddie Mac a copy of the bank statement or signature card for each account, designated as required in Guide section 8302.6.</p>	<p><i>Single-Family Seller/Servicer Guide, Forms section</i></p> <p>https://guide.freddiemac.com/app/guide/content/a_id/1001288</p>	<p>Email: Custodial_Account_Review@Freddiemac.com or Regular or Overnight Mail: Freddie Mac Attn: Loan Servicing STM 8250 Jones Branch Drive McLean, VA 22102-3110</p>
<p><input type="checkbox"/> Complete the following Letter Agreements if you maintain your custodial accounts with another Eligible Depository other than Servicer's own institution:</p> <ul style="list-style-type: none"> Form 1057SF, <i>Letter Agreement for Servicer's Single-Family Principal and Interest, or P & I Disbursement Clearing Custodial Account</i> Form 1058SF, <i>Letter Agreement for Servicer's Single-Family Buydown or Escrow Custodial Account</i> <p>NOTE: You must also send Freddie Mac a copy of the bank statement or signature card for each account, designated as required in Guide Section 8302.7.</p>	<p><i>Single-Family Seller/Servicer Guide, Forms section</i></p> <p>https://guide.freddiemac.com/app/guide/content/a_id/1001287</p>	<p>Email: Custodial_Account_Review@Freddiemac.com or Regular or Overnight Mail: Freddie Mac Attn: Loan Servicing STM 8250 Jones Branch Drive McLean, VA 22102-3110</p>
<p><input type="checkbox"/> Complete Form 1132A, <i>Authorization for Automatic Transfer of Funds from Principal and Interest Custodial Account Through the Automated Clearing House ACH.</i></p>	<p><i>Single-Family Seller/Servicer Guide, Forms section</i></p> <p>https://guide.freddiemac.com/app/guide/content/a_id/1001304</p>	<p>Email: Cashcollections@Freddiemac.com</p>
<p><input type="checkbox"/> Complete Form 1132, <i>Authorization for Automatic Transfer of Funds Through the Automated Clearing House ACH.</i></p>	<p><i>Single-Family Seller/Servicer Guide, Forms section</i></p> <p>https://guide.freddiemac.com/app/guide/content/a_id/1001303</p>	<p>Email: Cashcollections@Freddiemac.com Follow the mailing instructions on Form 1132. (You must send notarized original.)</p>



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Establish Custodial Agreement and Recertification		
What You Need to Do	Where to Locate Form(s)	How to Submit the Form(s)
<input type="checkbox"/> Complete Form 1034T, <i>Subsequent Transfer Custodial Certification Schedule</i> .	<i>Single-Family Seller/Servicer Guide, Forms section</i> https://guide.freddie.mac.com/app/guide/content/a_id/1001279	Email: Loan_Delivery_Funding_Ops@FreddieMac.com or Regular or Overnight Mail: Freddie Mac Mortgage Purchase Operations Department 1551 Park Run Drive, MS D5D, McLean, VA 22102
<input type="checkbox"/> Complete Single-Family Mortgages Form 1035: <i>Document Custodial Agreement or Form 1035DC: Designated Custodial Agreement</i> . (for agreements with BNY Mellon only). Interim servicer must sign the most recent version of Form 1035 or 1035DC and forward the original document to the Document Custodian to be signed and forwarded to Freddie Mac.	<i>Single-Family Seller/Servicer Guide, Forms section</i> https://guide.freddie.mac.com/app/guide/content/a_id/1001280	Email: InstitutionEligibility@FreddieMac.com or Regular or Overnight Mail: Attn: SF Counterparty Compliance & Eligibility Freddie Mac 1551 Park Run Drive McLean, VA 22102-3110

This document is not a replacement or substitute for the requirements of the Single-Family Seller/Servicer Guide (the "Guide"), and / or terms of your Purchase Documents as defined in the Guide. This material summarizes detailed information that is provided in the Guide and is for quick reference only. You may not rely solely upon this material to access Freddie Mac systems. See the Guide and other Purchase Documents and contact your Freddie Mac representative for complete details. If Servicer has access to specific technology through contracted terms of business with Freddie Mac, Servicer must contact their assigned Servicing Account Manager to determine if updated contract terms are necessary.

