

Servicing Portfolio Transfer Checklist

Subservicing (Servicing Agent)

When your organization intends to enter into an agreement as a Servicing Agent to subservice 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 for the portfolio(s) you are subservicing so that you are able to perform the following servicing-related activities:

- Form 479A: Single-Family Servicing Agent Certification and Agreement
- Investor reporting and Automated Clearing House (ACH) drafting.
- Custodial account setup and reconciliation.
- Loss mitigation and delinquency management.

Use the following checklists to ensure that you complete the required Servicing Agent Certification and Agreement and receive access to our suite of mortgage servicing technology tools. Requests for a new or change of Servicing Agent must be submitted **at least 20 Business Days prior to the effective date** of the addition or change to receive timely confirmation and approval from Freddie Mac.

Note that the Master Servicer must be an approved Freddie Mac Servicer in order to be eligible to establish a Servicing Agent relationship in accordance with Guide Sections 8102.1 and 2101.1. A Seller that is not also a Servicer may not serve as a Master Servicer. The Master Servicer may only have one Servicing Agent per Seller/Servicer Identification Number (SSID) at any given time.

To support any Transfer of Servicing that may occur between a Transferor and Transferee Servicer, Servicing Agents should review the Mortgage Industry Standards Maintenance Organization (MISMO) [Servicing Transfer Catalog \(MSTC\)](#) and adopt its industry-standard templates and best practices for servicing transfer instructions, portfolio characteristics, image transfer schedules, required reporting and reconciliation, which are designed to improve speed and accuracy and create a more seamless process for the borrower and the Transferee Servicer.

If you have any questions after reviewing these checklists, contact your Freddie Mac Servicing Account Manager or the Customer Support Contact Center at (800-FREDDIE) for assistance.

Complete Required Forms to Request System Access

What You Need to Do	Where to Locate the Form(s)	How to Submit the Form(s)
<input type="checkbox"/> At least 20 business days prior to effective date, master servicer and servicing agent complete Form 479A : Single-Family Servicing Agent Certification and Agreement. Provide any requested additional information or complete any requested additional tasks as may be requested by Freddie Mac.	<i>Single-Family Seller/Servicer Guide</i> , Forms Section https://guide.freddiemac.com/app/guide/form/479A	Email: Group_STM@Freddiemac.com



<input type="checkbox"/> Contact your Access Manager administrator and request them to grant you access to Servicing Transfer Manager.	Once you've received access to Servicing Transfer Manager , access it via Servicing Gateway .	
<p>NOTE: If your company does not use Access Manager, please continue with the steps below. View the tutorial to learn how to request access to Servicing Gateway tools and log in credentials.</p>		
<input type="checkbox"/> Complete the Freddie Mac Access Request Form to obtain access to subserviced portfolios. Include the S/S number you will subservice. NOTE: Be sure to select Seller/Servicer as the Org type to request access.	Freddie Mac Access Request Form https://sf.freddie.mac.com/general/loan-advisor-registration	Submit the form online.

Establish Custodial Accounts and ACH Drafting

What You Need to Do	Where to Locate Form(s)	How to Submit the Form(s)
<input type="checkbox"/> Complete the following Letter Agreements if you or your parent are an affiliate under common ownership with a financial institution that is an Eligible Depository and maintain your custodial accounts in such financial institution: <ul style="list-style-type: none"> • Form 1059SF, <i>Letter Agreement for Single-Family Principal and Interest, or P&I Disbursement Clearing Custodial Account</i> • Form 1060SF, <i>Letter Agreement for 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>	<i>Single-Family Seller/Servicer Guide, Forms section</i> https://guide.freddie.mac.com/app/guide/form/1059SF	Email: letter_agreements@freddie.mac.com



<p><input type="checkbox"/> Complete the following Letter Agreements if you maintain your custodial accounts with an unaffiliated Eligible Depository:</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/1001286</p>	<p>Email:</p> <p>letter_agreements@freddiemac.com</p>
<p><input type="checkbox"/> Complete Form 1132, <i>Authorization for Automatic Transfer of Funds Through the Automated Clearing House ACH for Sellers/Servicers</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:</p> <p>Cashcollections@Freddiemac.com</p> <p>Note: Follow the mailing instructions on Form 1132 and make sure the form is notarized.</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:</p> <p>Cashcollections@Freddie mac.com</p>

This document is not a replacement or substitute for the requirements of the Single-Family Seller/Servicer Guide (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.

