

Servicing Portfolio Transfer Checklist:

Subservicing (Servicing Agent)

When your organization enters 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:

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

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 and System Access		
What You Need to Do	Where to Locate the Form(s)	How to Submit the Form(s)
<input type="checkbox"/> Complete Form 479A, <i>Single-Family Servicing Agent Certification and Agreement</i> .	<i>Single-Family Seller/Servicer Guide</i> , Forms Section https://guide.freddiemac.com/app/guide/content/a_id/1001317	Email: Group_STM@Freddiemac.com
<input type="checkbox"/> Contact your Access Manager administrator and request them to grant you access to Servicing Transfer Manager. NOTE: If your company does not use Access Manager , please continue with the steps below.	Once you've received access to Servicing Transfer Manager , access it via Servicing Gateway .	Email: Group_STM@Freddiemac.com Regular or Overnight Mail: Freddie Mac Attn: Loan Servicing STM 8250 Jones Branch Drive McLean, VA 22102-3110
<input type="checkbox"/> Complete the Servicing Tools Request Form to obtain access to subserviced portfolios. Include the S/S number you will subservice.	http://www.freddiemac.com/help/servicing_tool_request/servicing_tool_request_form.html	Submit the form online.
<input type="checkbox"/> Complete the Workout Prospector® Order Form to obtain access to Workout Prospector.	https://sf.freddiemac.com/tools-learning/servicing-gateway/our-solutions/workout-prospector	Submit the form online.
<input type="checkbox"/> Complete the Servicing Tools Request Form to obtain access to Attorney Data Reporting (ADR) and Servicing Transfer Manager via Servicing Gateway.	http://www.freddiemac.com/help/servicing_tool_request/servicing_tool_request_form.html	Submit online.
<input type="checkbox"/> Complete the <i>Form 906, Freddie Mac Loan Coverage Advisor® Authorized User Role Form</i> to obtain access to Loan Coverage Advisor.	<i>Single-Family Seller/Servicer Guide</i> , Forms section https://guide.freddiemac.com/app/guide/content/a_id/1001349	Email: Enterprise_Cash_Customer_Setup@freddiemac.com
<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/form/1059SF</p>	<p>Email: Custodial_Account_Review@Freddiemac.com</p> <p>or</p> <p>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/1001286</p>	<p>Email: Custodial_Account_Review@Freddiemac.com</p> <p>or</p> <p>Regular or Overnight Mail: Freddie Mac Attn: Loan Servicing STM 8250 Jones Branch Drive McLean, VA 22102-3110</p>

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.

