

# *my* OPTIGO

Conventional Small Submission Training



Welcome! This training will guide you through the myOptigo® process of Submitting a Conventional Small Loan.

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### Summary:

This myOptigo® functionality is tailored for Conventional Small loans, properties with loan amounts between \$2M - \$10M, allowing lenders to efficiently review, verify, and submit opportunities with all conventional small-specific data points required by Freddie Mac. Real-time status tracking and clear task management ensure that each step in the process is completed accurately and on time.

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### Business Benefit:

- Streamlines the collection and validation of conventional small data.
- Minimizes errors and omissions in complex conventional small submissions through automated checks.
- Improves coordination among deal team members for conventional small transactions with real-time updates and task assignments.

LOAN PIPELINE

All Opportunities ▾

Search



+ CREATE NEW

OPPORTUNITY NAME	OPPORTUNITY ID	LOAN #	EXTERNAL STATUS	DATE SUBMITTED	EXTERNAL DEAL TEAM	CITY	STATE	PROPERTY NAME
			01- Loan Submitted	11/21/2025		ALBANY	NY	
			01- Loan Submitted	11/21/2025		ARLINGT...	VA	
			03- Quote Accepted	11/21/2025		ATLANTA	GA	
			01- Loan Submitted	11/21/2025		ARLINGT...	VA	
			01- Loan Submitted	11/21/2025		ATLANTA	GA	
			Draft Created	11/21/2025		Cincinnati	OH	
			01- Loan Submitted	11/21/2025		ALBANY	NY	
			01- Loan Submitted	11/21/2025		ALBANY	NY	
			01- Loan Submitted	11/21/2025		ALBANY	NY	
			01- Loan Submitted	11/21/2025		ATLANTA	GA	
			01- Loan Submitted	11/21/2025		ATLANTA	GA	
			01- Loan Submitted	11/21/2025		ATLANTA	GA	
			07- Locked	11/21/2025		JACKSON	TN	
			07- Locked	11/21/2025		ATLANTA	GA	
			01- Loan Submitted	11/21/2025		GREENVI...	SC	
			01- Loan Submitted	11/21/2025		AUSTIN	TX	
			01- Loan Submitted	11/21/2025		VALDOSTA	GA	
			03- Quote Accepted	11/21/2025		TULSA	OK	
			02- Quoted	11/21/2025		Pittsburg...	CA	
			03- Quote Accepted	11/21/2025		ATLANTA	GA	

**LOAN PIPELINE**

When logging in to myOptigo, you will be brought to the Pipeline Screen. This screen displays all loans you've submitted to Freddie Mac and the associated status.

This is your starting point for all loan submissions and reviews.

Click to continue →

1 - 250 of 18537 items

First < 1 2 3 4 5 > Last

250 items per page

Note: Sensitive information has been censored throughout this training module.

LOAN PIPELINE

All Opportunities ▾

Search



+ CREATE NEW

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			01- Loan Submitted	11/21/2025			ATLANTA	GA	
			01- Loan Submitted	11/21/2025			ATLANTA	GA	
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			03- Quote Accepted	11/21/2025			TULSA	OK	
			02- Quoted	11/21/2025			Pittsburg...	CA	
			03- Quote Accepted	11/21/2025			ATLANTA	GA	

**LOAN PIPELINE**  
On the pipeline page, you can view general loan details such as opportunity name, opportunity ID, loan number, status, date submitted, deal team, branch, city, state, property name, and other relevant information.  
Click to continue →

1 - 250 of 18537 items

First < 1 2 3 4 5 > Last

250 items per page

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LOAN PIPELINE

All Opportunities

Search + CREATE NEW

OPPORTUNITY NAME	OPPORTUNITY ID	LOAN #	EXTERNAL STATUS	DATE SUBMITTED	EXTERNAL DEAL TEAM	OPTIGO LENDER BRANCH NAME	POOL NAME	POOL ID	POOL EXTERNAL DEAL TEAM	CITY
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			03- Quote Accepted	11/21/2025						ATLANTA
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			01- Loan Submitted	11/21/2025						ATLANTA
			Draft Created	11/21/2025						Cincinnati
			01- Loan Submitted	11/21/2025						ALBANY
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			03- Quote Accepted	11/21/2025						TULSA
			02- Quoted	11/21/2025						Pittsburg
			03- Quote Accepted	11/21/2025						ATLANTA

**COLUMNS**  
 By clicking the "Columns" button on the sidebar, you can customize which columns are displayed in your pipeline view. Please note that any changes you make will reset to the default template after you log out.

Search...

- OPPORTUNITY**
  - Opportunity Name
  - Opportunity Id
  - Loan #
  - External Status
  - Date Submitted
  - External Deal Team
  - Optigo Lender Branch Name
- POOL**
  - Pool Name
  - Pool ID
  - Pool External Deal Team
  - Pool Status
- PROPERTY**
  - City
  - State
  - Property Name

Columns, Filters, Export

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LOAN PIPELINE

All Opportunities

Search [input] + CREATE NEW

OPPORTUNITY NAME	OPPORTUNITY ID	LOAN #	EXTERNAL STATUS	EXTERNAL DEAL TEAM	OPTIGO LENDER BRANCH NAME	POOL NAME	POOL ID	POOL EXTERNAL DEAL TEAM	CITY	STATE	PROPERTY NAME
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Columns menu with search and checkboxes for columns like OPPORTUNITY, POOL, etc.

**COLUMNS**  
You can also click on a specific column header to customize your view.  
You can also rearrange the order of the columns by clicking and holding the header of the column you want to move, and dragging it to the position you would like.

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LOAN PIPELINE

All Opportunities

Search  + CREATE NEW

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**FILTERS**  
You can also filter by a specific field using the sidebar on the pipeline page.

Search...

Columns

Filter

Export

Submission View

OPPORTUNITY

OPPORTUNITY NAME

Contains

Filter...

Reset Apply

OPPORTUNITY ID

LOAN #

EXTERNAL STATUS

DATE SUBMITTED

EXTERNAL DEAL TEAM

OPTIGO LENDER BRANCH NAME

POOL

POOL NAME

POOL ID

POOL EXTERNAL DEAL TEAM

PROPERTY

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LOAN PIPELINE

All Opportunities

Search [ ] + CREATE NEW

OPPORTUNITY NAME	OPPORTUNITY ID	LOAN #	EXTERNAL STATUS	EXTERNAL DEAL TEAM	OPTIGO LENDER BRANCH NAME	POOL NAME	POOL ID	POOL EXTERNAL DEAL TEAM	CITY	STATE	PROPERTY NAME
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Filter menu overlay with hamburger icon, Filter List, Filter, Contains dropdown, Filter... input, and Reset/Apply buttons.

**FILTERS**  
You can also filter by hovering over a column header, clicking on the hamburger icon and clicking the middle button.

1 - 250 of 18537 items

First < 1 2 3 4 5 > Last

250 items per page

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LOAN PIPELINE

All Opportunities

Search [ ] + CREATE NEW

OPPORTUNITY NAME	OPPORTUNITY ID	LOAN #	EXTERNAL STATUS	EXTERNAL DEAL TEAM	OPTIGO LENDER BRANCH NAME	POOL NAME	POOL ID	POOL EXTERNAL DEAL TEAM	CITY	STATE	PROPERTY NAME
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			03- Quote Accepted						TULSA	OK	
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Column header menu with options: Pin Column, Group by External Status, Autosize This Column, Autosize All Columns, Reset Columns. A sub-menu is open showing Pin Left, Pin Right, and No Pin (selected).

**PIN COLUMNS**  
By clicking a column header, you can also choose to pin that column to either the far right or far left of your pipeline view for easier access.

1 - 250 of 18537 items

First < 1 2 3 4 5 > Last

250 items per page

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LOAN PIPELINE

All Opportunities

Search



+ CREATE NEW

OPPORTUNITY NAME	OPPORTUNITY ID	LOAN #	EXTERNAL STATUS	DATE SUBMITTED	OPTIGO LENDER BRANCH NAME	POOL NAME	POOL ID	POOL EXTERNAL DEAL TEAM	CITY	STATE	PROPERTY NAME
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			03- Quote Accepted	11/21/2025					ATLANTA	GA	

- Pin Column
- Group by Date Submitted
- Autosize This Column
- Autosize All Columns
- Reset Columns

**GROUPING**  
You can also group columns to organize your pipeline data by clicking on the header; however, grouping is only available for certain columns, such as External Status, Date Submitted, and City.

1 - 250 of 18537 items

First < 1 2 3 4 5 > Last

250 items per page

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All Opportunities

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- Pin Column
- Group by Date Submitted
- Autosize This Column
- Autosize All Columns
- Reset Columns

**RESIZING COLUMNS**  
To resize columns, you can use the autosize columns options.

1 - 250 of 18537 items

First < 1 2 3 4 5 > Last

250 items per page

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LOAN PIPELINE

All Opportunities

Search



+ CREATE NEW

OPPORTUNITY NAME	OPPORTUNITY ID	LOAN #	EXTERNAL STATUS	DATE SUBMITTED	OPTIGO LENDER BRANCH NAME	POOL NAME	POOL ID	POOL EXTERNAL DEAL TEAM	CITY	STATE	PROPERTY NAME
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- Pin Column
- Group by Date Submitted
- Autosize This Column
- Autosize All Columns
- Reset Columns

**RESET COLUMNS**  
To reset columns to the default pipeline, click the "Reset Columns" option.

1 - 250 of 18537 items

First < 1 2 3 4 5 > Last

250 items per page

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LOAN PIPELINE

All Opportunities ▾

Search  + CREATE NEW

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**SEARCH**  
You can search for a loan by many characteristics such as property name, opportunity name, and loan number using the search bar at the top of the pipeline page.

1 - 250 of 18537 items

250 items per page

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LOAN PIPELINE

All Opportunities

Search [ ] + CREATE NEW

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**ITEMS PER PAGE**  
You can customize how many items you want to view per page at the bottom right of the pipeline. Available options include 50, 100, 150, 200, and 250 items per page.

Dropdown menu for items per page with options: 50, 100, 150, 200, 250. The 250 option is selected and highlighted with a pink circle and a hand cursor.

1 - 250 of 18537 items

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			01- Loan Submitted	11/21/2025						ARLINGT...	VA	
			03- Quote Accepted	11/21/2025						ATLANTA	GA	
			01- Loan Submitted	11/21/2025						ARLINGT...	VA	
			01- Loan Submitted	11/21/2025						ATLANTA	GA	
⋮			Draft Created	11/21/2025						Cincinnati	OH	
			01- Loan Submitted	11/21/2025						ALBANY	NY	
			01- Loan Submitted	11/21/2025						ALBANY	NY	
			01- Loan Submitted	11/21/2025						ALBANY	NY	
			01- Loan Submitted	11/21/2025						ATLANTA	GA	
			01- Loan Submitted	11/21/2025						ATLANTA	GA	
			01- Loan Submitted	11/21/2025						ATLANTA	GA	
			07- Locked	11/21/2025						JACKSON	TN	
			07- Locked	11/21/2025						ATLANTA	GA	
			01- Loan Submitted	11/21/2025						GREENVI...	SC	
			01- Loan Submitted	11/21/2025						AUSTIN	TX	
			01- Loan Submitted	11/21/2025						VALDOSTA	GA	
			03- Quote Accepted	11/21/2025						TULSA	OK	
			02- Quoted	11/21/2025						Pittsburg...	CA	
			03- Quote Accepted	11/21/2025						ATLANTA	GA	



**1-LEVEL SORT**  
Sort any column from A to Z by clicking once on the bolded column header.  
Sort from Z to A by clicking on the bolded column header again.  
Clicking a third time will remove the sort from this column.

1 - 250 of 18537 items

First < 1 2 3 4 5 > Last

250 items per page

Note: Sensitive information has been censored throughout this training module.

LOAN PIPELINE

All Opportunities ▾

Search



+ CREATE NEW

OPPORTUNITY NAME	OPPORTUNITY ID	LOAN #	EXTERNAL STATUS 2 ↑	DATE SUBMITTED 1 ↓	EXTERNAL DEAL TEAM	OPTIGO LENDER BRANCH NAME	POOL NAME	POOL ID	POOL EXTERNAL DEAL TEAM	CITY	STATE	PROPERTY NAME
			01- Loan Submitted	11/21/2025						AUSTIN	TX	
			01- Loan Submitted	11/21/2025						ALBANY	NY	
			01- Loan Submitted	11/21/2025						ATLANTA	GA	
			01- Loan Submitted	11/21/2025						ATLANTA	GA	
			01- Loan Submitted	11/21/2025						VALDOSTA	GA	
			01- Loan Submitted	11/21/2025						ALBANY	NY	
			01- Loan Submitted	11/21/2025						GREENVI...	SC	
			01- Loan Submitted	11/21/2025						ALBANY	NY	
			01- Loan Submitted	11/21/2025						ATLANTA	GA	
			01- Loan Submitted	11/21/2025						ATLANTA	GA	
			01- Loan Submitted	11/21/2025						ALBANY	NY	
			01- Loan Submitted	11/21/2025						ARLINGT...	VA	
			01- Loan Submitted	11/21/2025						ARLINGT...	VA	
			02- Quoted	11/21/2025						Pittsburg...	CA	
			03- Quote Accepted	11/21/2025						ATLANTA	GA	
			03- Quote Accepted	11/21/2025						TULSA	OK	
			03- Quote Accepted	11/21/2025						ATLANTA	GA	
			07- Locked	11/21/2025						ATLANTA	GA	
			07- Locked	11/21/2025						JACKSON	TN	
			Draft Created	11/21/2025						Cincinnati	OH	

**2-LEVEL SORT**

You can also sort two levels at a time.

After sorting one column, you can add a secondary level of sort by holding down shift and clicking the other column you want to sort.

After double sorting, you'll notice a small 1 or 2 next to the arrow in the header indicating whether the column is the primary or secondary priority for the sort.

Remove the secondary sort by clicking on the bolded column header again.

Click to continue →

1 - 250 of 18537 items

First < 1 2 3 4 5 > Last

250 items per page

Note: Sensitive information has been censored throughout this training module.

LOAN PIPELINE

All Opportunities

Search [ ] + CREATE NEW

OPPORTUNITY NAME	OPPORTUNITY ID	LOAN #	EXTERNAL STATUS	DATE SUBMITTED	EXTERNAL DEAL TEAM	OPTIGO LENDER BRANCH NAME	POOL NAME	POOL ID	POOL EXTERNAL DEAL TEAM	CITY	STATE	PROPERTY NAME
			01- Loan Submitted	11/21/2025						AUSTIN	TX	
			01- Loan Submitted	11/21/2025						ALBANY	NY	
			01- Loan Submitted	11/21/2025						ATLANTA	GA	
			01- Loan Submitted	11/21/2025						ATLANTA	GA	
			01- Loan Submitted	11/21/2025						VALDOSTA	GA	
			01- Loan Submitted	11/21/2025						ALBANY	NY	
			01- Loan Submitted	11/21/2025						GREENVI...	SC	
			01- Loan Submitted	11/21/2025						ALBANY	NY	
			01- Loan Submitted	11/21/2025						ATLANTA	GA	
			01- Loan Submitted	11/21/2025						ATLANTA	GA	
			01- Loan Submitted	11/21/2025						ALBANY	NY	
			01- Loan Submitted	11/21/2025						ARLINGT...	VA	
			01- Loan Submitted	11/21/2025						ARLINGT...	VA	
			02- Quoted	11/21/2025						Pittsburg...	CA	
			03- Quote Accepted	11/21/2025						ATLANTA	GA	
			03- Quote Accepted	11/21/2025						TULSA	OK	
			03- Quote Accepted	11/21/2025						ATLANTA	GA	
			07- Locked	11/21/2025						ATLANTA	GA	
			07- Locked	11/21/2025						JACKSON	TN	
			Draft Created	11/21/2025						Cincinnati	OH	

**EXPORT**  
You can export the pipeline screen by clicking the export button located on the sidebar.

Columns | Filters | Export

Note: Sensitive information has been censored throughout this training module.



LOAN PIPELINE

All Opportunities

Search [magnifying glass icon] + CREATE NEW

OPPORTUNITY NAME	OPPORTUNITY ID	LOAN #	EXTERNAL STATUS	DATE SUBMITTED	EXTERNAL DEAL TEAM	OPTIGO LENDER BRANCH NAME	POOL NAME	POOL ID	POOL EXTERNAL DEAL TEAM	CITY	STATE	PROF
			01- Loan Submitted	11/24/2025						Arlington	VA	
⋮			Draft Created	11/24/2025						Albany	NY	
			01- Loan Submitted	11/24/2025						El Cajon	CA	
⋮			Draft Created	11/24/2025						Jackson	TN	
⋮			Draft Created	11/24/2025						Atlanta	GA	
⋮			Draft Created	11/24/2025						Arlington	VA	
⋮			Draft Created	11/24/2025						Huntsville	AL	
⋮			Draft Created	11/24/2025						Albany	NY	
⋮			Draft Created	11/24/2025						Arlington	VA	
⋮			Draft Created	11/24/2025						Chicago	IL	
⋮			Draft Created	11/24/2025						New York	NY	
⋮			Draft Created	11/24/2025						Elmwoo...	NJ	
⋮			Draft Created	11/24/2025						Irvine	CA	
⋮			Draft Created	11/24/2025						Irvine	CA	
⋮			Draft Created	11/24/2025						Ontario	CA	
⋮			Draft Created	11/24/2025						Pittsburg	CA	
⋮			Draft Created	11/21/2025						Frisco	TX	
			03- Quote Accepted	11/21/2025						SAN ANT...	TX	
			Draft Created	11/21/2025								

Opportunity  
Pool

**CREATE NEW CONVENTIONAL SMALL OPPORTUNITY**  
 To create a new opportunity, click the "Create Opportunity" button in the top right corner and select "Opportunity."

Note: AON pools and supplemental loans should continue to go through the Origination & Underwriting System (OUS) for the time being.


Note: Sensitive information has been censored throughout this training module.





### Upload New Loan


**!** WARNING: The following are not supported during upload in myOptigo:  
1) LSTs with manipulated formulas or headers/field names  
2) LSTs containing special characters (ie. #, &, \, ", +, etc.)  
  
In order to minimize errors, please ensure your LST has not been modified from its original version.


**CREATE NEW CONVENTIONAL SMALL OPPORTUNITY**  
To upload a new loan, fill out all required fields specific to the Conventional Small loan on the submission form.


Product Type\* 


Sub-Product Type\* 


Funding Type\* 

Loan Purpose\* 

Specialized Asset Type\* 

Loan Type\* 

Loan Sub-Type\* 

Lender Branch\* 

Property Name\*

No file chosen

Note: Sensitive information has been censored throughout this training module.

### Upload New Loan

**CREATE NEW CONVENTIONAL SMALL OPPORTUNITY**

Select the product type, sub-product type (if applicable), funding type, specialized asset type (Conventional Small), loan type, loan sub-type, and lender branch and deal team. Enter a name for the opportunity, then upload the associated Loan Submission Template (LST) using the Excel upload button.

**WARNING:** The following are not supported during upload in myOptigo:

- 1) LSTs with manipulated formulas or headers/field names
- 2) LSTs containing special characters (ie. #, &, \, ", +, etc.)

In order to minimize errors, please ensure your LST has not been modified from its original version.

Product Type\*  
Conventional

Sub-Product Type\*  
N/A

Funding Type\*  
Immediate

Loan Purpose\*  
Acquisition

Specialized Asset Type\*

- Standard
- Student
- Manufactured Housing Community (MHC)
- Seniors
- Conventional Small

Property Name\*

Choose File No file chosen

Cancel Upload

Note: Sensitive information has been censored throughout this training module.

### Upload New Loan

**⚠ WARNING:** The following are not supported during upload in myOptigo:

- 1) LSTs with manipulated formulas or headers/field names
- 2) LSTs containing special characters (ie. #, &, \, ", +, etc.)

*In order to minimize errors, please ensure your LST has not been modified from its original version.*

Product Type\*  
Conventional

Sub-Product Type\*  
N/A

Funding Type\*  
Immediate

Loan Purpose\*  
Acquisition

Specialized Asset Type\*  
Conventional Small

Loan Type\*  
Standard

Loan Sub-Type\*  
N/A

Lender Branch\*

Deal Team

Property Name\*  
Example Property

Choose File LST.xlsm

**CREATE NEW CONVENTIONAL SMALL OPPORTUNITY**

Once all required information has been input, the "Upload" button will be active.

Cancel Upload

Note: Sensitive information has been censored throughout this training module.

←BACK  
Conventional Small Figma ( Opp ID: )

OPPORTUNITY DETAILS

Total Errors	8
Transaction Data	2
Property Data	1
Borrower Data	3
Property Mgmt Data	✓
Sources and Uses	✓
Quote Scenario	2
Rent Roll	✓
I&E	✓
Collections	✓
Tax Abatements	✓

The number of errors will appear in red at the top and show which tabs need to be reviewed before submission.

**CREATE NEW CONVENTIONAL SMALL OPPORTUNITY**  
After clicking "Upload", you will be brought to a new screen where you will see the opportunity details.  
Here you can review all submission data and clear any errors before submitting to Freddie Mac.

Cancel Save for Later Check & Send

Is this a refi of a Freddie Mac loan?  No

Maturity Date: 3/3/2026

Unpaid Principal at Payoff: \$1,500,000.00

Yield Maint. Due at Payoff

Existing Lender

Est. Payoff/Closing Date

Current Note Rate: 0%

Current Annual Debt Service

**Deal Party details**

Originator First Name   
Originator first name is required (min 3 characters)

Originator Last Name   
Originator last name is required (min 3 characters)

Is this a mortgage broker transaction?  No

Note: Sensitive information has been censored throughout this training module.

←BACK

Conventional Small Figma ( Opp ID: )

OPPORTUNITY DETAILS

- Total Errors **3**
- Transaction Data ✓
- Property Data **1**
- Borrower Data **3**
- Property Mgmt Data ✓
- Sources and Uses ✓
- Quote Scenario **2**
- Rent Roll ✓
- I&E ✓
- Collections ✓
- Tax Abatements ✓

Transaction Data

Transaction Details

Seller Loan #

Is this a refi of a Freddie Mac loan?  No

Maturity Date  
3/3/2026

Unpaid Principal at Payoff  
\$1,500,000.00

Yield Maint. Due at Payoff

Existing Lender

Est. Payoff/Closing Date

Current Note Rate  
0%

Current Annual Debt Service

Deal Party details

Originator First Name  
John

Originator Last Name  
Doe

Is this a mortgage broker transaction?  No

Cancel Save for Later Check & Send

**TRANSACTION DATA**  
On the Transaction Data tab, enter or verify transaction data such as Seller Loan #, Purchase Price (for acquisitions), Seller of the Property, Originator data and more.

Note that the error notification has been cleared for this screen and the field is no longer highlighted in red.

Note: Sensitive information has been censored throughout this training module.

OPPORTUNITY DETAILS

PROPERTY DATA

On the Property Data tab, enter or verify property information including: Property Name, Address, Type, Unit Count, etc.

Total Errors 6

Transaction Data ✓

Property Data 1

Borrower Data 3

Property Mgmt Data ✓

Sources and Uses ✓

Quote Scenario 2

Rent Roll ✓

I&E ✓

Collections ✓

Tax Abatements ✓

Property Data

Cancel Save for Later Check & Send

Property Details

Property Name  
Property Name

Address  
Property Address

City  
Dallas

State  
TX

County  
Dallas

Zip Code  
75203

Property Type  
Garden

Number of Units  
15

Year Built\*  
1984

Year Renovated  
2024

Co-Op?  
No

Scattered Site  
No

Ground Lease  
None

Earthquake Insurance Required?  
No

Heat Utilities

Electric Utilities

Water / Sewer  
Reimbursed

Water/Sewer Infrastructure  
Water / Sewer

- (Please select from list)
- Public
- Private

Tenant Concentrations

Make sure to also populate the "Water/ Sewer Infrastructure" field, specific to Conventional Small loans.

Source	Percentage
Student	0.000%
Military	0.000%

Note: Sensitive information has been censored throughout this training module.

←BACK

Conventional Small Figma ( Opp ID: )

OPPORTUNITY DETAILS

- Total Errors 5
- Transaction Data ✓
- Property Data ✓
- Borrower Data 3
- Property Mgmt Data ✓
- Sources and Uses ✓
- Quote Scenario 2
- Rent Roll ✓
- I&E ✓
- Collections ✓
- Tax Abatements ✓

Borrower Data

Cancel Save for Later Check & Send

Borrower Data  
+ Add Borrower

Borrower

Type of Entity:

Borrowing Entity First Name:

Borrowing Entity Last Name:

Borrowing Entity Org Name:   
Borrower organization name is required (min 3 characters)

Single or Multiple Asset Entity:

State Organized:

**BORROWER DATA**

On the Borrower Data tab, verify or enter details including: Borrower Type of Entity, Borrowing Entity Name, Borrowing Entity Organization Name, Type and Borrower Principals.

At the bottom you can review Borrower Totals for Percentage Interest Owned, Net Worth, Liquidity, and Contingent Liabilities.

Resolve all errors before moving to the next tab.

Borrower Principals

Note: Sensitive information has been censored throughout this training module.

←BACK

Conventional Small Figma ( Opp ID: )

OPPORTUNITY DETAILS

<b>Total Errors</b>	<b>2</b>
Transaction Data	✓
Property Data	✓
Borrower Data	✓
Property Mgmt Data	✓
Sources and Uses	✓
Quote Scenario	2
Rent Roll	✓
I&E	✓
Collections	✓
Tax Abatements	✓

### Property Management Data

Cancel Save for Later Check & Send

Property Management Details

Property Management Company: Test\_PMC

Borrower Controlled: Yes

**PROPERTY MANAGEMENT DATA**

On the Property Mgmt Data tab, review and confirm the property management details, including the Property Management Company Name and whether the management is Borrower-Controlled.

Note: Sensitive information has been censored throughout this training module.

OPPORTUNITY DETAILS

<b>Total Errors</b>	<b>2</b>
Transaction Data	✓
Property Data	✓
Borrower Data	✓
Property Mgmt Data	✓
Sources and Uses	✓
Quote Scenario	2
Rent Roll	✓
I&E	✓
Collections	✓
Tax Abatements	✓

Sources and Uses		Cancel	Save for Later	Check & Send
<b>Sources</b>		<b>Uses</b>		
Proposed A Loan	\$2,100,000.00	Existing Mortgage(s)	\$1,500,000.00	
+ Add Other Source		Purchase Price	\$0.00	
		Origination Fees	\$21,000.00	
		FM application Fee	\$2,100.00	
		Investor Fees	\$0.00	
		Closing Costs	\$39,900.00	
		Other (Yield Maintenance)	\$0.00	
		+ Add Other Use		
		<b>Subtotal - Closing Costs</b>	<b>\$63,000.00</b>	
		Repair Escrow	\$0.00	
Cash From Borrower	\$0.00	Cash To Borrower	\$537,000.00	
<b>TOTAL SOURCES</b>	<b>\$2,100,000.00</b>	<b>TOTAL USES</b>	<b>\$2,100,000.00</b>	

**SOURCES AND USES DATA**

On the Sources and Uses tab, review all the information and ensure that the Total Sources and Total Uses match. Note that you can add additional Sources or Uses on this page as needed before proceeding.

Note: Sensitive information has been censored throughout this training module.

←BACK

Conventional Small Figma ( Opp ID: )

OPPORTUNITY DETAILS

Total Errors 1

Transaction Data ✓

Property Data ✓

Borrower Data ✓

Property Mgmt Data ✓

Sources and Uses ✓

Quote Scenario 1

Rent Roll ✓

I&E ✓

Collections ✓

Tax Abatements ✓

Quote Scenario

Cancel Save for Later Check & Send

Loan Terms

+ Add Another Scenario

Scenario

Loan Amount \$2,100,000.00

Note Type Fixed

Hedge Protection N/A

Final Float N/A

Lien Position 1

Total Term (Mos) 120

Interest-Only Term (Mos) 36

**QUOTE SCENARIO DATA**

On the Quote Scenario tab, review, edit, and add all quote-related data, including Loan Terms, Interest Rate Details, Buydown/Buyup fees, and Escrow information.

Make sure all information is accurate and complete.

Note: Sensitive information has been censored throughout this training module.

←BACK

Conventional Small Figma ( Opp ID: )

OPPORTUNITY DETAILS

**RENT ROLL DATA**  
On the Rent Roll tab, review and edit the uploaded Rent Roll subsections: Summary, Unit Type, Analysis, and Commercial.

Total Errors 0

Transaction Data ✓

Property Data ✓

Borrower Data ✓

Property Mgmt Data ✓

Sources and Uses ✓

Quote Scenario ✓

Rent Roll ✓

Rent Roll Summary ✓

Unit Type ✓

Rent Roll Analysis ✓

Commercial Rent Roll ✓

I&E ✓

Collections ✓

Tax Abatements ✓

Rent Roll Summary

Cancel Save for Later Check & Send

Residential Rent Summary

Unit type	# of Units	Avg. Res. Sq Ft.	Avg. Contract Rent/Unit Type	Total Res. Sq Ft.	Monthly Res. GPR	Annual Res. GPR
1 BedRoom	9	725	\$1,472.00	6,525	\$13,248.00	\$158,976.00
2 BedRoom	6	984.5	\$1,862.00	5,907	\$11,174.00	\$134,088.00
<b>Total Residential</b>	<b>15</b>	<b>829</b>	<b>\$1,628.00</b>	<b>12,432</b>	<b>\$24,422.00</b>	<b>\$293,064.00</b>

Commercial Rent Summary

Unit type	# of Units	Avg. Comm. Sq Ft.	Avg. Rent/SF/Year	Total Comm. Sq Ft.	Monthly Comm. GPR	Annual Comm. GPR
Commercial Space	0	0	0	0	0	0
<b>Total Comm. Space</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

Rent Totals

Unit type	Total # of Units	Total Avg. Sq Ft.	Total Avg. Rent/SF/Year	Total Total Sq Ft.	Monthly Res. GPR	Annual Res. GPR
Total Residential	15	829	\$1,628.00	12,432	\$24,422.00	\$293,064.00
Total Commercial Space	0	0	0	0	0	0
<b>TOTALS</b>	<b>15</b>	<b>829</b>	<b>\$1,628.00</b>	<b>12,432</b>	<b>\$24,422.00</b>	<b>\$293,064.00</b>

Note: Sensitive information has been censored throughout this training module.

←BACK

Conventional Small Figma ( Opp ID: )

OPPORTUNITY DETAILS

**INCOME AND EXPENSE DATA**  
On the Income and Expense (I&E) tab, you can review and edit the uploaded I&E and value data to ensure accuracy.

Cancel Save for Later Check & Send

- Total Errors 0
- Transaction Data ✓
- Property Data ✓
- Borrower Data ✓
- Property Mgmt Data ✓
- Sources and Uses ✓
- Quote Scenario ✓
- Rent Roll ✓
  - Rent Roll Summary ✓
  - Unit Type ✓
  - Rent Roll Analysis ✓
  - Commercial Rent Roll ✓
- I&E ✓
  - Collections** ✓
  - Tax Abatements ✓

### Income & Expense

Optigo Lender As Is Values

Optigo Lender As Is Value: \$3,000,000.00    Value per unit: \$200,000.00    Cap Rate (Effective): 6.148%    LTV: 70.000%

+/- Columns

Source of Data	Operating Statement Year ...	Operating Statement Year ...	Operating Statement Year 1...	Operating Statement Borro...	Operating Statement S/S A...	Operating Statement 3rd ...	Operating Statement 2nd ...	Operating Statement 1st m...	Operating Statement T-12
Time Period	12/31/2022	12/31/2023	12/31/2024	12/31/2026	12/31/2026	09/30/2025	10/31/2025	11/30/2025	11/30/2025
<b>Income</b>									
Gross Potential Rent-Residential	\$0.00	\$0.00	\$0.00	\$298,648.00	\$293,064.00	\$24,422.00	\$24,422.00	\$24,422.00	\$300,988.00
Less: Residential Concessions	\$0.00	\$0.00	\$0.00	\$14,932.00	\$0.00	\$699.50	\$699.50	\$1,387.00	\$15,835.50
Less: Residential Vacancy	\$0.00	\$0.00	\$0.00	\$0.00	\$21,979.80	\$2,541.00	\$1,726.00	\$0.00	\$145,816.00
Less: Residential Bad Debt	\$0.00	\$0.00	\$0.00	\$5,674.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,410.00
Short Term Premiums	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Residential Net Rental Income	\$0.00	\$0.00	\$0.00	\$278,042.00	\$271,084.20	\$21,181.50	\$21,996.50	\$23,035.00	\$137,926.50
Monthly Residential NRI	\$0.00	\$0.00	\$0.00	\$23,170.17	\$22,590.35	\$1,765.13	\$1,833.04	\$1,919.58	\$11,493.88
Commercial Income	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Less: Commercial Vacancy	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Commercial Net Rental Income	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Monthly Commercial NRI	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Coop Maint Fee	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Utility Reimbursement	\$0.00	\$0.00	\$0.00	\$6,828.00	\$7,216.92	\$453.66	\$601.19	\$749.38	\$3,827.70
Laundry	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Parking	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Cable	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Miscellaneous Other Income	\$0.00	\$0.00	\$0.00	\$18,208.00	\$15,439.64	\$1,162.97	\$1,543.97	\$1,152.97	\$10,816.37

Note: Sensitive information has been censored throughout this training module.

←BACK

Conventional Small Figma ( Opp ID: )

OPPORTUNITY DETAILS

**COLLECTIONS DATA**  
On the Collections tab, you can review and edit past years' data as necessary, including details such as Monthly Vacancy and GPR.

Total Errors 0

- Transaction Data ✓
- Property Data ✓
- Borrower Data ✓
- Property Mgmt Data ✓
- Sources and Uses ✓
- Quote Scenario ✓
- Rent Roll ✓
  - Rent Roll Summary ✓
  - Unit Type ✓
  - Rent Roll Analysis ✓
  - Commercial Rent Roll ✓
- I&E ✓
- Collections ✓
- Tax Abatements ✓

Collections

Cancel Save for Later Check & Send

2025	GPR	Vacancy	Concessions	Bad Debt	Add Back Non Revenue	Normalized Bad Debt
January	\$26,623.00	-\$26,567.00	\$0.00	\$0.00	\$0.00	\$0.00
February	\$24,925.00	-\$22,720.00	-\$100.00	\$0.00	\$0.00	-\$117.50
March	\$25,000.00	-\$20,052.00	\$0.00	-\$350.00	\$0.00	-\$117.50
April	\$24,967.00	-\$15,471.00	-\$1,725.00	-\$450.00	\$0.00	-\$117.50
May	\$24,788.00	-\$11,631.00	-\$2,450.00	-\$130.00	\$0.00	-\$117.50
June	\$24,775.00	-\$7,948.00	-\$5,675.00	-\$65.00	\$0.00	-\$117.50
July	\$24,622.00	-\$5,951.00	-\$2,400.00	-\$65.00	\$0.00	-\$117.50
August	\$24,622.00	-\$3,809.00	-\$699.50	-\$350.00	\$0.00	-\$117.50
September	\$24,422.00	-\$2,541.00	-\$699.50	\$0.00	\$0.00	-\$117.50
October	\$24,422.00	-\$1,726.00	-\$699.50	\$0.00	\$0.00	-\$117.50
November	\$24,422.00	\$0.00	-\$1,387.00	\$0.00	\$0.00	-\$117.50
December	\$24,422.00	\$0.00	-\$1,467.50	\$0.00	\$0.00	-\$117.50
<b>Sum</b>	<b>\$298,010.00</b>	<b>-\$118,416.00</b>	<b>-\$17,303.00</b>	<b>-\$1,410.00</b>	<b>\$0.00</b>	<b>-\$1,292.50</b>

2026	GPR	Vacancy	Concessions	Bad Debt	Add Back Non Revenue	Normalized Bad Debt
January	\$24,421.00	\$0.00	-\$750.00	\$0.00	\$0.00	-\$117.50
February	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
March	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
April	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
May	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
June	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
July	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
August	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Note: Sensitive information has been censored throughout this training module.

←BACK

Conventional Small Figma ( Opp ID: )

OPPORTUNITY DETAILS

Total Errors 0

Transaction Data ✓

Property Data ✓

Borrower Data ✓

Property Mgmt Data ✓

Sources and Uses ✓

Quote Scenario ✓

Rent Roll ✓ ^

Rent Roll Summary ✓

Unit Type ✓

Rent Roll Analysis ✓

Commercial Rent Roll ✓

I&E ✓

Collections ✓

Tax Abatements ✓

Tax Abatements

Cancel Save for Later Check & Send

Abatement Type \*

None

select

None

Finite

Infinite

**TAX ABATEMENT DATA**

Lastly, on the Tax Abatement tab, you can specify if a Tax Abatement is applicable to the loan; if so, enter the Abatement Type, Start Date, and Specific Program details.

Click to continue →

Note: Sensitive information has been censored throughout this training module.

←BACK

Conventional Small Figma ( Opp ID: )

OPPORTUNITY DETAILS

Total Errors 0

Transaction Data ✓

Property Data ✓

Borrower Data ✓

Property Mgmt Data ✓

Sources and Uses ✓

Quote Scenario ✓

Rent Roll ✓ ^

Rent Roll Summary ✓

Unit Type ✓

Rent Roll Analysis ✓

Commercial Rent Roll ✓

I&E ✓

Collections ✓

Tax Abatements ✓

Transaction Data

Transaction Details

Seller Loan # 952016

Is this a refi of a Freddie Mac loan? No

Maturity Date 3/3/2026

Unpaid Principal at Payoff \$1,500,000.00

Yield Maint. Due at Payoff

Existing Lender Simmons Bank

Est. Payoff/Closing Date

Current Note Rate 0%

Current Annual Debt Service

Deal Party details

Originator First Name John

Originator Last Name Doe

Is this a mortgage broker transaction? No

**SUBMIT OPPORTUNITY**  
Once all data has been reviewed and any errors have been cleared, the "Check & Send" button will become available; click this button to submit your opportunity to Freddie Mac for further review.

Cancel

Save for Later

Check & Send

Note: Sensitive information has been censored throughout this training module.

←BACK  
Conventional Small Figma ( Opp ID: )

OPPORTUNITY DETAILS

- Total Errors 0
- Transaction Data
- Property Data
- Borrower Data
- Property Mgmt Data
- Sources and Uses
- Quote Scenario
- Rent Roll 
  - Rent Roll Summary
  - Unit Type
  - Rent Roll Analysis
  - Commercial Rent Roll
- I&E
- Collections
- Tax Abatements

Transaction Data

Transaction Details

Seller Loan #  
952016

Is this a refi of a Freddie Mac loan?  No

Maturity Date  
3/3/2026

Unpaid Principal at Payoff  
\$1,500,000.00

Est. Payoff/Closing Date

Deal Party details

Originator First Name  
John

Originator Last Name  
Doe

Is this a mortgage broker transaction?  No

Cancel Save for Later Check & Send

**SUBMIT OPPORTUNITY**

The submission will take 1-2 minutes to process. After successful submission, a loan number will be generated and the loan status will update to "Loan Submitted".



Thanks for your submission!  
Freddie Mac support will contact you if any further action is required.

[Back to Dashboard](#)

Note: Sensitive information has been censored throughout this training module.

LOAN PIPELINE

All Opportunities ▾

Search  + CREATE NEW

OPPORTUNITY NAME	OPPORTUNITY ID	LOAN #	EXTERNAL STATUS	DATE SUBMITTED	EXTERNAL DEAL TEAM	OPTIGO LENDER BRANCH NAME	POOL NAME	POOL ID	POOL EXTERNAL DEAL TEAM	CITY	STATE	PROPERTY
			01- Loan Submitted	11/24/2025						Jackson	TN	
			01- Loan Submitted	11/24/2025						Statesboro	GA	
			01- Loan Submitted	11/24/2025						Atlanta	GA	
Test Property			01- Loan Submitted	11/24/2025						Santee	CA	
			03- Quote Accepted	11/24/2025						TULSA	OK	
⋮			Draft Created	11/24/2025						Albany	NY	
			01- Loan Submitted	11/24/2025						El Cajon	CA	
⋮			Draft Created	11/24/2025						Jackson	TN	
⋮			Draft Created	11/24/2025						Atlanta	GA	
⋮			Draft Created	11/24/2025						Arlington	VA	
⋮			Draft Created	11/24/2025						Huntsville	AL	
⋮			Draft Created	11/24/2025						Albany	NY	
⋮			Draft Created	11/24/2025						Arlington	VA	
⋮			Draft Created	11/24/2025						Chicago	IL	
⋮			Draft Created	11/24/2025						New York	NY	
⋮			Draft Created	11/24/2025						Elmwood...	NJ	
⋮			Draft Created	11/24/2025						Irvine	CA	
⋮			Draft Created	11/24/2025						Irvine	CA	
⋮			Draft Created	11/24/2025						Irvine	CA	

**POST-SUBMISSION OPPORTUNITY PAGE**  
After the loan has been submitted, you can click on the opportunity to view information about the loan.

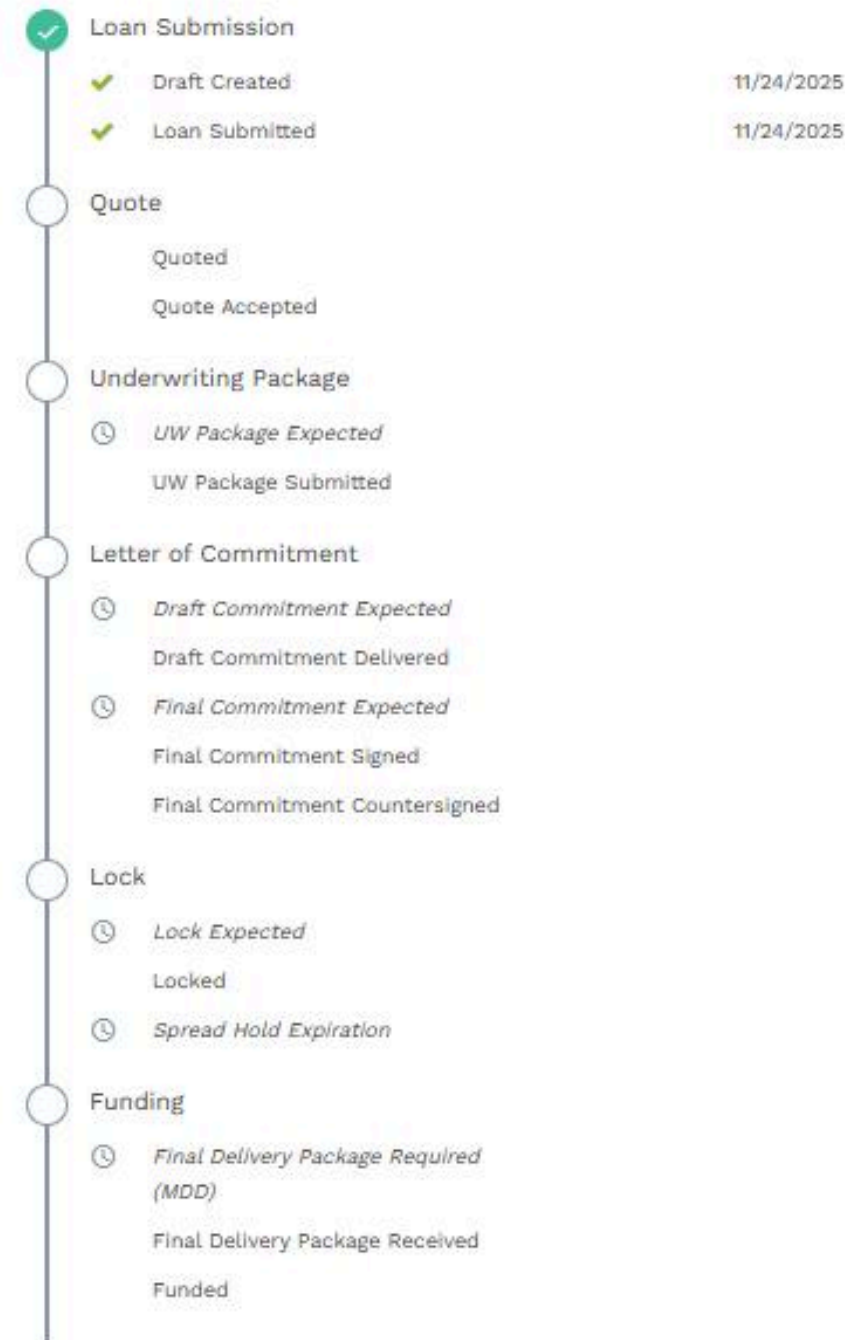
Note: Sensitive information has been censored throughout this training module.

← BACK  
Example Property Name

Summary Documents Borrower

### Loan Trackers

#### Loan Status Tracker



#### Sub-Tracker

- Handoff**
  - Treasury Floor Date
  - Kickoff Call
  - Index Locked
- Inspection**
  - Lender Scheduled Inspection
  - Lender Actual Inspection
  - FM Scheduled Inspection
  - FM Actual Inspection
- Credit Approval**
- CDE Checklist Review**
- Closing**
  - Closing Expected
  - Closed
  - Expected First Payment Date
  - First Payment Date
- Legal**
  - LIA Expected
  - LIA Delivered

#### Summary Info

Name	
Address	
Opportunity ID	
FM Loan Number	
Loan Type	Conventional

#### Deal Team Members

Freddie Mac Optigo Lender

- Primary Producer
- Secondary Producer
- Primary Production Analyst
- Secondary Production Analyst
- Primary Underwriter

#### Tasks

PENDING (1) COMPLETED (0)

- Core Production Documents (1)
- Underwriting Documents (0)
- Commitment Documents (0)

Diverse Borrower Certification CREATE NEW

FREDDIE MAC OPTIGO LENDER

### POST-SUBMISSION OPPORTUNITY PAGE

You can view real-time status updates with timestamps, high-level summary information, and deal team members.

Click to continue →

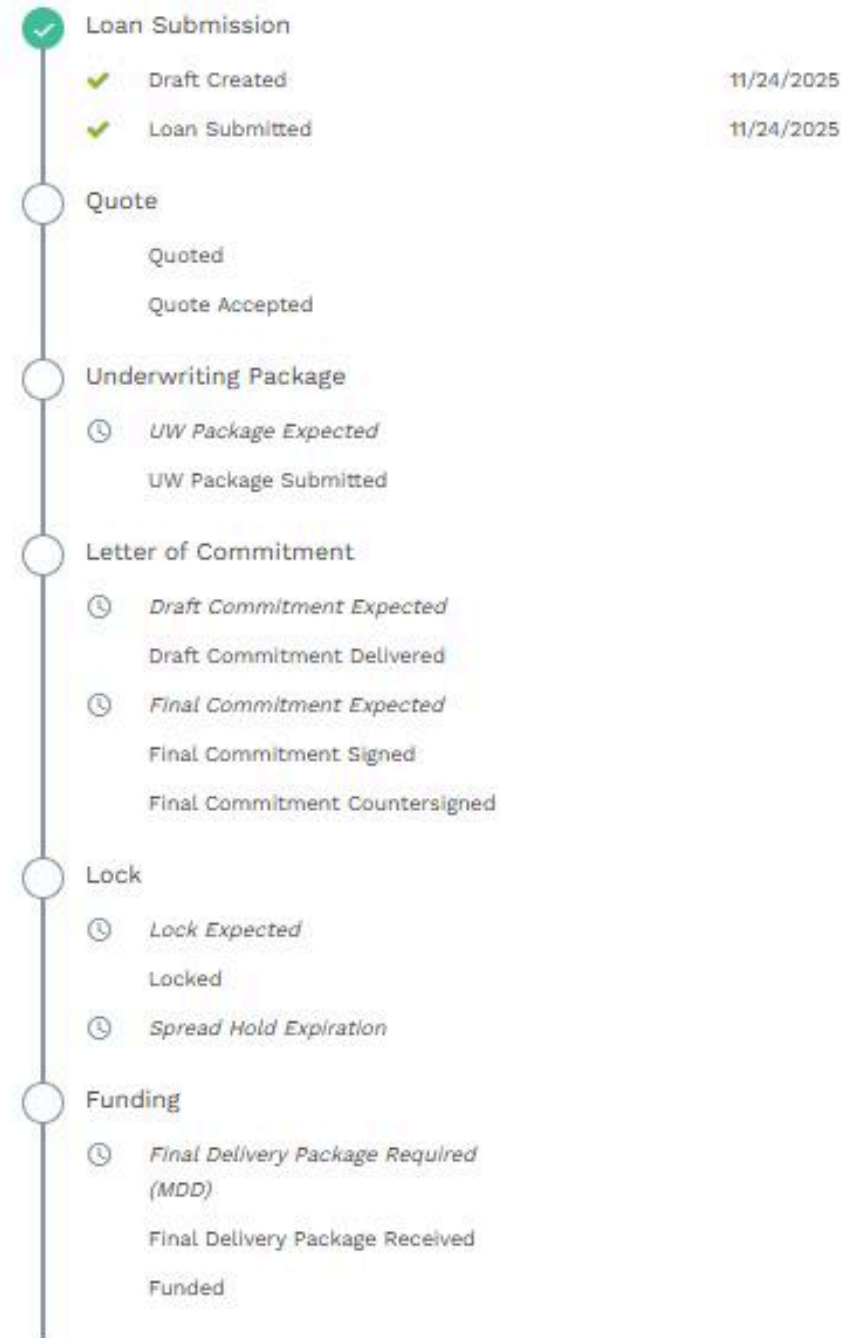
Note: Sensitive information has been censored throughout this training module.

← BACK  
Example Property Name

Summary Documents Borrower

### Loan Trackers

#### Loan Status Tracker



#### Sub-Tracker

- Handoff**
  - Treasury Floor Date
  - Kickoff Call
  - Index Locked
- Inspection**
  - Lender Scheduled Inspection
  - Lender Actual Inspection
  - FM Scheduled Inspection
  - FM Actual Inspection
- Credit Approval**
- CDE Checklist Review**
- Closing**
  - Closing Expected
  - Closed
  - Expected First Payment Date
  - First Payment Date
- Legal**
  - LIA Expected
  - LIA Delivered

#### Summary Info

Name	
Address	
Opportunity ID	
FM Loan Number	
Loan Type	Conventional

#### Deal Team Members

Freddie Mac Optigo Lender

- Primary Producer
- Secondary Producer
- Primary Production Analyst
- Secondary Production Analyst
- Primary Underwriter

#### Tasks

PENDING (1) COMPLETED (0)

- Core Production Documents (1)
- Underwriting Documents (0)
- Commitment Documents (0)

Diverse Borrower Certification CREATE NEW

FREDDIE MAC OPTIGO LENDER

**TASKS SECTION**

Under the "Tasks" section near the bottom of the page, you will find specific tasks that you are prompted to complete throughout the loan process. Depending on the status, they will fall under "Pending" or "Completed."

Note: Sensitive information has been censored throughout this training module.

← BACK  
Example Property Name

Summary Documents Borrower

Loan Trackers

Loan Status Tracker

- Loan Submission
  - ✓ Draft Created 11/24/2025
  - ✓ Loan Submitted 11/24/2025
- Quote
  - Quoted
  - Quote Accepted
- Underwriting Package
  - ⌚ UW Package Expected
  - UW Package Submitted
- Letter of Commitment
  - ⌚ Draft Commitment Expected
  - Draft Commitment Delivered
  - ⌚ Final Commitment Expected
  - Final Commitment Signed
  - Final Commitment Countersigned
- Lock
  - ⌚ Lock Expected
  - Locked
  - ⌚ Spread Hold Expiration
- Funding
  - ⌚ Final Delivery Package Required (MDD)
  - Final Delivery Package Received
  - Funded

Sub-Tracker

- Handoff
  - Treasury Floor Date
  - Kickoff Call
  - Index Locked
- Inspection
  - ⌚ Lender Scheduled Inspection
  - Lender Actual Inspection
  - ⌚ FM Scheduled Inspection
  - FM Actual Inspection
- Credit Approval
- CDE Checklist Review
- Closing
  - ⌚ Closing Expected
  - Closed
  - ⌚ Expected First Payment Date
  - First Payment Date
- Legal
  - ⌚ LIA Expected
  - LIA Delivered

**UPLOAD NARRATIVE DOCUMENT**

Under the "Core Production Documents" subsection, you'll find a pending task prompting you to upload the Mortgage Transaction Narrative Analysis (MTNA).

Lenders will upload a narrative document that provides qualitative insights into the Conventional Small loan, offering context and additional details that may not be captured in their submitted data.

FM Loan Number  
Loan Type Conventional

Tasks

PENDING (1) COMPLETED (0)

Core Production Documents (1)

Posted: 11/24/25 Upload Mortgage Transaction Narrative Analysis  
Updated: 11/24/25, 10:53 AM

UPLOAD

Underwriting Documents (0)

Commitment Documents (0)

Deal Team Members

Freddie Mac Optigo Lender

- Primary Producer
- Secondary Producer
- Primary Production Analyst
- Secondary Production Analyst
- Primary Underwriter

Diverse Borrower Certification CREATE NEW

FREDDIE MAC OPTIGO LENDER

Note: Sensitive information has been censored throughout this training module.

← BACK

**UPLOAD NARRATIVE DOCUMENT**  
After clicking the "Upload" button next to the pending task, select and upload the MTNA file from your device.

Summary Documents Borrower

### Loan Trackers

#### Loan Status Tracker

- Loan Submission
  - ✓ Draft Created 11/24/2025
  - ✓ Loan Submitted 11/24/2025
- Quote
  - Quoted
  - Quote Accepted
- Underwriting Package
  - ⌚ UW Package Expected
  - UW Package Submitted
- Letter of Commitment
  - ⌚ Draft Commitment Expected
  - Draft Commitment Delivered
  - ⌚ Final Commitment Expected
  - Final Commitment Signed
  - Final Commitment Countersigned
- Lock
  - ⌚ Lock Expected
  - Locked
  - ⌚ Spread Hold Expiration
- Funding
  - ⌚ Final Delivery Package Required (MDD)
  - Final Delivery Package Received
  - Funded

#### Sub-Tracker

- Handoff
  - Treasury Floor Date
  - Kickoff Call
  - Index Locked
- Inspection
  - ⌚ Lender Scheduled Inspection
  - Lender Actual Inspection
  - ⌚ FM Scheduled Inspection
  - FM Actual Inspection
- Credit Approval
- CDE Checklist Review
- Closing
  - ⌚ Closing Expected
  - Closed
  - ⌚ Expected First Payment Date
  - First Payment Date
- Legal
  - ⌚ LIA Expected
  - LIA Delivered

#### Summary Info

Name  
Address

#### Deal Team Members

Freddie Mac Optigo Lender

Primary Producer  
Secondary Producer  
Primary Production Analyst  
Secondary Production Analyst  
Primary Underwriter

Diverse Borrower Certification CREATE NEW

X

### Upload Mortgage Transaction Narrative Analysis

Choose document... **CHOOSE FILE**

CANCEL

Posted: 11/24/25 Updated: 11/24/25, 10:53 AM

Underwriting Documents (0)  
Commitment Documents (0)

UPLOAD

FREDDIE MAC OPTIGO LENDER

Note: Sensitive information has been censored throughout this training module.

← BACK

Summary Documents Borrower

**UPLOAD NARRATIVE DOCUMENT**  
Once you have selected a file to upload, click the "Upload" button again to complete the process.

### Loan Trackers

#### Loan Status Tracker

- Loan Submission
  - ✓ Draft Created 11/24/2025
  - ✓ Loan Submitted 11/24/2025
- Quote
  - Quoted
  - Quote Accepted
- Underwriting Package
  - ⊙ UW Package Expected
  - UW Package Submitted
- Letter of Commitment
  - ⊙ Draft Commitment Expected
  - Draft Commitment Delivered
  - ⊙ Final Commitment Expected
  - Final Commitment Signed
  - Final Commitment Countersigned
- Lock
  - ⊙ Lock Expected
  - Locked
  - ⊙ Spread Hold Expiration
- Funding
  - ⊙ Final Delivery Package Required (MDD)
  - Final Delivery Package Received
  - Funded

#### Sub-Tracker

- Handoff
  - Treasury Floor Date
  - Kickoff Call
  - Index Locked
- Inspection
  - ⊙ Lender Scheduled Inspection
  - Lender Actual Inspection
  - ⊙ FM Scheduled Inspection
  - FM Actual Inspection
- Credit Approval
- CDE Checklist Review
- Closing
  - ⊙ Closing Expected
  - Closed
  - ⊙ Expected First Payment Date
  - First Payment Date
- Legal
  - ⊙ LIA Expected
  - LIA Delivered

#### Summary Info

Name  
Address

#### Deal Team Members

- Freddie Mac Optigo Lender
- Primary Producer
- Secondary Producer
- Primary Production Analyst
- Secondary Production Analyst
- Primary Underwriter

Diverse Borrower Certification CREATE NEW

**Upload Mortgage Transaction Narrative Analysis**

Narrative\_Analysis.pdf

Posted: 11/24/25 Updated: 11/24/25, 10:53 AM

- Underwriting Documents (0)
- Commitment Documents (0)

FREDDIE MAC OPTIGO LENDER

UPLOAD

Note: Sensitive information has been censored throughout this training module.

← BACK  
Example Property Name

Summary Documents Borrower

### Loan Trackers

#### Loan Status Tracker

- ✓ Loan Submission
  - ✓ Draft Created 11/24/2025
  - ✓ Loan Submitted 11/24/2025
- Quote
  - Quoted
  - Quote Accepted
- Underwriting Package
  - UW Package Expected
  - UW Package Submitted
- Letter of Commitment
  - Draft Commitment Expected
  - Draft Commitment Delivered
  - Final Commitment Expected
  - Final Commitment Signed
  - Final Commitment Countersigned
- Lock
  - Lock Expected
  - Locked
  - Spread Hold Expiration
- Funding
  - Final Delivery Package Required (MDD)
  - Final Delivery Package Received
  - Funded

#### Sub-Tracker

- Handoff**
  - Treasury Floor Date
  - Kickoff Call
  - Index Locked
- Inspection**
  - Lender Scheduled Inspection
  - Lender Actual Inspection
  - FM Scheduled Inspection
  - FM Actual Inspection
- Credit Approval**
- CDE Checklist Review**
- Closing**
  - Closing Expected
  - Closed
  - Expected First Payment Date
  - First Payment Date
- Legal**
  - LIA Expected
  - LIA Delivered

### Summary Info

Name
Address
Opportunity ID
FM Loan Number
Loan Type

### Deal Team Members

Freddie Mac
Primary Producer
Primary Underwriter

**UPLOAD NARRATIVE DOCUMENT**

The previously pending task will now move to the "Completed" tab, indicating that your upload was successful.

### Tasks

PENDING (0) COMPLETED (1)

#### Core Production Documents (1)

- ✓ Upload Mortgage Transaction Narrative Analysis  
Updated: 11/24/25, 11:26 AM

#### Underwriting Documents (0)

#### Commitment Documents (0)

Diverse Borrower Certification CREATE NEW

Note: Sensitive information has been censored throughout this training module.

Documents

Document Q&A Download All

Type	Title	File Name	Activity
Initial LST submission	Test Property	LST.xlsm	Uploaded by: application/vnd.ms-excel.sheet.macroenabled.12   11/24/25, 10:47 AM
Mortgage Transaction Narrative Analysis	Mortgage Transaction Narrative Analysis	Narrative_Analysis.pdf	Uploaded by: application/pdf   11/24/25, 11:26 AM

1 - 2 of 2 items

First < 1 > Last

10 items per page

**NARRATIVE DOCUMENT**

You will see both the Initial LST Submission and the MTNA in the “Documents” tab. You can download and view the files by clicking the download icon to the far right or by clicking “Download All”.

Note: Sensitive information has been censored throughout this training module.

### Loan Trackers

#### Loan Status Tracker

- Loan Submission**
  - ✓ Draft Created 03/25/2025
  - ✓ Loan Submitted 03/25/2025
- Quote**
  - Quoted
  - Quote Accepted
- Underwriting Package**
  - 🕒 UW Package Expected
  - UW Package Submitted
  - UW Package Checked In
- Letter of Commitment**
  - 🕒 Draft Commitment Expected
  - Draft Commitment Delivered
  - 🕒 Final Commitment Expected
  - Final Commitment Signed
  - Final Commitment Countersigned
- Lock**
  - 🕒 Lock Expected
  - Locked
  - 🕒 Spread Hold Expiration
- Funding**
  - Transferred to Purchase
  - 🕒 Final Delivery Package Required (MDD)
  - Final Delivery Package Received
  - Funded

#### Sub-Tracker

- Handoff**
  - Treasury Floor Date
  - Kickoff Call
  - Index Locked
- Inspection**
  - 🕒 Lender Scheduled Inspection
  - Lender Actual Inspection
  - 🕒 FM Scheduled Inspection
  - FM Actual Inspection
- Credit Approval**
  - 🕒 Final Approval Submission Expected
  - Final Approval Submitted
  - Final Approved
- Commitment Amendment**
  - Commitment Amendment Uploaded
- CDE Checklist Review**
- Closing**
  - 🕒 Closing Expected
  - Closed
  - 🕒 Expected First Payment Date
  - First Payment Date
- Legal**
  - 🕒 LIA Expected
  - LIA Delivered

### Summary Info

Name
Address
Opportunity ID
FM Loan Number
Loan Type

Freddie Mac Optigo Lender

No deal team members.

### Tasks

PENDING (2) COMPLETED (0)

#### Core Production Documents (2)

- Posted: 05/14/25 **Upload Property Financials** Updated: 5/14/25, 1:07 PM UPLOAD
- Posted: 03/25/25 **Upload Mortgage Transaction Narrative Analysis** Updated: 3/25/25, 11:43 AM UPLOAD

Diverse Borrower Certification CREATE NEW

#### Underwriting Documents (0)

FREDDIE MAC OPTIGO LENDER

#### Commitment Documents (0)

## UPLOAD REVISED FINANCIALS

You have the ability to upload revised financials (Rent Roll, I&E, Collections) prior to going under app.

Click to continue →

Note: Sensitive information has been censored throughout this training module.

← BACK  
Example Property Name

Summary Documents Borrower

Loan Trackers

Loan Status Tracker

- Loan Submission
  - ✓ Draft Created 03/25/2025
  - ✓ Loan Submitted 03/25/2025
- Quote
  - Quoted
  - Quote Accepted
- Underwriting Package
  - ⌚ UW Package Expected
  - UW Package Submitted
  - UW Package Checked In
- Letter of Commitment
  - ⌚ Draft Commitment Expected
  - Draft Commitment Delivered
  - ⌚ Final Commitment Expected
  - Final Commitment Signed
  - Final Commitment Countersigned
- Lock
  - ⌚ Lock Expected
  - Locked
  - ⌚ Spread Hold Expiration
- Funding
  - Transferred to Purchase
  - ⌚ Final Delivery Package Required (MDD)
  - Final Delivery Package Received
  - Funded

Sub-Tracker

- Handoff
  - Treasury Floor Date
  - Kickoff Call
  - Index Locked
- Inspection
  - ⌚ Lender Scheduled Inspection
  - Lender Actual Inspection
  - ⌚ FM Scheduled Inspection
  - FM Actual Inspection
- Credit Approval
  - ⌚ Final Approval Submission Expected
  - Final Approval Submitted
  - Final Approved
- Commitment Amendment
  - Commitment Amendment Uploaded
- CDE Checklist Review
- Closing
  - ⌚ Closing Expected
  - Closed
  - ⌚ Expected First Payment Date
  - First Payment Date
- Legal
  - ⌚ LIA Expected
  - LIA Delivered

Summary Info

- Name
- Address
- Opportunity ID
- FM Loan Number
- Loan Type

**UPDATED PROPERTY FINANCIALS REQUEST**

You must first reach out to the producer on the deal to create a task on their end to upload revised financials.

Once a Freddie Mac producer has initiated the request for updated financials, you will see these requests in the "Tasks" card under the "Core Production Documents" dropdown.

Click to continue →

Tasks

PENDING (2) COMPLETED (0)

Core Production Documents (2)

- Posted: 05/14/25 **Upload Property Financials** Updated: 5/14/25, 1:07 PM
- Posted: 03/25/25 **Upload Mortgage Transaction Narrative Analysis** Updated: 3/25/25, 11:43 AM

Underwriting Documents (0)

Commitment Documents (0)

Diverse Borrower Certification

FREDDIE MAC OPTIGO LENDER

Note: Sensitive information has been censored throughout this training module.

**UPLOAD UPDATED FINANCIALS**  
Click "Upload" to upload a new LST with the updated financials.

### Loan Trackers

#### Loan Status Tracker

- Loan Submission**
  - ✓ Draft Created 03/25/2025
  - ✓ Loan Submitted 03/25/2025
- Quote**
  - Quoted
  - Quote Accepted
- Underwriting Package**
  - ⌚ UW Package Expected
  - UW Package Submitted
  - UW Package Checked In
- Letter of Commitment**
  - ⌚ Draft Commitment Expected
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  - ⌚ Final Commitment Expected
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  - ⌚ Lock Expected
  - Locked
  - ⌚ Spread Hold Expiration
- Funding**
  - Transferred to Purchase
  - ⌚ Final Delivery Package Required (MDD)
  - Final Delivery Package Received
  - Funded

#### Sub-Tracker

- Handoff**
  - Treasury Floor Date
  - Kickoff Call
  - Index Locked
- Inspection**
  - ⌚ Lender Scheduled Inspection
  - Lender Actual Inspection
  - ⌚ FM Scheduled Inspection
  - FM Actual Inspection
- Credit Approval**
  - ⌚ Final Approval Submission Expected
  - Final Approval Submitted
  - Final Approved
- Commitment Amendment**
  - Commitment Amendment Uploaded
- CDE Checklist Review**
- Closing**
  - ⌚ Closing Expected
  - Closed
  - ⌚ Expected First Payment Date
  - First Payment Date
- Legal**
  - ⌚ LIA Expected
  - LIA Delivered

### Summary Info

Name
Address
Opportunity ID
FM Loan Number
Loan Type

### Deal Team Members

Freddie Mac Optigo Lender

No deal team members.

### Tasks

PENDING (2) COMPLETED (0)

#### Core Production Documents (2)

- Posted: 05/14/25 **Upload Property Financials** Updated: 5/14/25, 1:07 PM **UPLOAD**
- Posted: 03/25/25 **Upload Mortgage Transaction Narrative Analysis** Updated: 3/25/25, 11:43 AM **UPLOAD**
- Underwriting Documents (0) **FREDDIE MAC OPTIGO LENDER**
- Commitment Documents (0)

Note: Sensitive information has been censored throughout this training module.

**UPLOAD UPDATED FINANCIALS**  
Choose the LST you want to upload, title it, and click "Upload" again.

Loan Trackers

Loan Status Tracker

- Loan Submission
  - ✓ Draft Created 03/25/2025
  - ✓ Loan Submitted 03/25/2025
- Quote
  - Quoted
  - Quote Accepted
- Underwriting Package
  - ⌚ UW Package Expected
  - UW Package Submitted
  - UW Package Checked In
- Letter of Commitment
  - ⌚ Draft Commitment Expected
  - Draft Commitment Delivered
  - ⌚ Final Commitment Expected
  - Final Commitment Signed
  - Final Commitment Countersigned
- Lock
  - ⌚ Lock Expected
  - Locked
  - ⌚ Spread Hold Expiration
- Funding
  - Transferred to Purchase
  - ⌚ Final Delivery Package Required (MDD)
  - Final Delivery Package Received
  - Funded

Sub-Tracker

- Handoff
  - Treasury Floor Date
  - Kickoff Call
  - Index Locked
- Inspection
  - ⌚ Lender Scheduled Inspection
  - Lender Actual Inspection
  - ⌚ FM Scheduled Inspection
  - FM Actual Inspection
- Credit Approval
  - ⌚ Final Approval Submission Expected
  - Final Approval Submitted
  - Final Approved
- Commitment Amendment
  - Commitment Amendment Uploaded
- CDE Checklist Review
- Closing
  - ⌚ Closing Expected
  - Closed
  - ⌚ Expected First Payment Date
  - First Payment Date
- Legal
  - ⌚ LIA Expected
  - LIA Delivered

Summary Info

Name	Example Property Name
Address	
Opportunity ID	

Deal Team Members

Freddie Mac Optigo Lender

No deal team members.

Diverse Borrower Certification CREATE NEW

**Upload Property Financials**

Conventional UW LST (5).xism

Title \*  
Test LST

Posted: 03/25/25 Upload Mortgage Transaction Narrative Analysis  
Updated: 3/25/25, 11:43 AM

Underwriting Documents (0)

Commitment Documents (0)

UPLOAD

UPLOAD

FREDDIE MAC OPTIGO LENDER

The system will extract the I&E, Collections and Rent Roll data from the LST, close the "Upload Property Financials" task, and create three new tasks.

Note: Sensitive information has been censored throughout this training module.

← BACK  
Example Property Name

Summary Documents Borrower

### REVIEW UPDATED FINANCIALS

You'll see three new "Review" tasks to complete under the "Core Production Documents" dropdown. At this time you can either "Review" the data you just uploaded, or "Reupload".

#### Loan Trackers

##### Loan Status Tracker

- Loan Submission
  - ✓ Draft Created 03/25/2025
  - ✓ Loan Submitted 03/25/2025
- Quote
  - Quoted
  - Quote Accepted
- Underwriting Package
  - ⌚ UW Package Expected
  - UW Package Submitted
  - UW Package Checked In
- Letter of Commitment
  - ⌚ Draft Commitment Expected
  - Draft Commitment Delivered
  - ⌚ Final Commitment Expected
  - Final Commitment Signed
  - Final Commitment Countersigned
- Lock
  - ⌚ Lock Expected
  - Locked
  - ⌚ Spread Hold Expiration
- Funding
  - Transferred to Purchase
  - ⌚ Final Delivery Package Required (MDD)
  - Final Delivery Package Received
  - Funded

##### Sub-Tracker

- Handoff
  - Treasury Floor Date
  - Kickoff Call
  - Index Locked
- Inspection
  - ⌚ Lender Scheduled Inspection
  - Lender Actual Inspection
  - ⌚ FM Scheduled Inspection
  - FM Actual Inspection
- Credit Approval
  - ⌚ Final Approval Submission Expected
  - Final Approval Submitted
  - Final Approved
- Commitment Amendment
  - Commitment Amendment Uploaded
- CDE Checklist Review
- Closing
  - ⌚ Closing Expected
  - Closed
  - ⌚ Expected First Payment Date
  - First Payment Date
- Legal
  - ⌚ LIA Expected
  - LIA Delivered

Property Info

Example Property Name

Address

Opportunity ID

FM Loan Number

Loan Type

Deal Team Members

Freddie Mac Optigo Lender

No deal team members.

#### Tasks

PENDING (4) COMPLETED (1)

##### Core Production Documents (4)

- Posted: 05/14/25 Review updated financials - Rent Collections  
Updated: 5/14/25, 1:16 PM
- Posted: 05/14/25 Review updated financials - Rent Roll  
Updated: 5/14/25, 1:16 PM
- Posted: 05/14/25 Review updated financials - I&E  
Updated: 5/14/25, 1:16 PM
- Posted: 03/25/25 Upload Mortgage Transaction Narrative Analysis  
Updated: 3/25/25, 11:43 AM

##### Underwriting Documents (0)

##### Commitment Documents (0)

Diverse Borrower Certification CREATE NEW

FREDDIE MAC OPTIGO LENDER

REVIEW

REUPLOAD

Note: Sensitive information has been censored throughout this training module.

Income & Expense

T-12 / YTD column designation  
T-12 +/- Columns

Source of Data	Operating Statement Year 1 Back	Operating Statement T12/YTD	Operating Statement S/S As is Proforma	Lender Comments
Time Period	12/2024	01/2025	01/2025	
<b>Income</b>				
Gross Potential Rent-Residential	\$3,291,075.82	\$3,897,841.76	\$4,525,272.00	
Less: Residential Concessions	\$0.00	\$0.00	\$0.00	
Less: Residential Vacancy	\$0.00	\$0.00	\$518,002.91	T3
Less: Residential Bad Debt	\$0.00	\$0.00	\$0.00	
Short Term Premiums	\$8,780.00	\$7,013.51	\$6,687.00	T6
Residential Net Rental Income	\$3,299,855.82	\$3,904,855.27	\$4,013,956.09	
Monthly Residential NRI	\$274,987.99	\$325,404.61	\$334,496.34	
Commercial Income	\$0.00	\$0.00	\$0.00	
Less: Commercial Vacancy	\$0.00	\$0.00	\$0.00	Commercial Vacancy
Commercial Net Rental Income	\$0.00	\$0.00	\$0.00	
Monthly Commercial NRI	\$0.00	\$0.00	\$0.00	
Coop Maint Fee	\$0.00	\$0.00	\$0.00	
Utility Reimbursement	\$8,500.26	\$20,524.33	\$20,524.33	T12
Laundry	\$14,102.68	\$19,102.67	\$19,102.67	T12
Parking	\$2,990.00	\$15,218.20	\$15,218.20	T12
Cable	\$0.00	\$0.00	\$0.00	
Miscellaneous Other Income	\$116,620.01	\$137,362.52	\$153,039.06	
Total Other Income	\$142,212.95	\$192,207.72	\$207,884.26	
EGI	\$3,442,068.77	\$4,097,062.99	\$4,221,840.35	
<b>Expenses</b>				
<b>Fixed Expenses</b>				
Real Estate Taxes	\$70,750.90	\$382,115.10	\$394,425.36	Current Escrow + 3%

**REVIEW UPDATED FINANCIALS**

Here you can review the data to confirm it was extracted correctly from the LST. You can edit values and add "Lender Comments" by double clicking into the cell.

Click to continue →

Note: Sensitive information has been censored throughout this training module.

Income & Expense

T-12 / YTD column designation  
T-12 +/- Columns

Source of Data	Operating Statement Year 1 Back	Operating Statement T12/YTD	Operating Statement S/S As is Proforma	Lender Comments
Time Period	12/2024	01/2025	01/2025	
<b>Income</b>				
Gross Potential Rent-Residential	\$3,291,075.82	\$3,897,841.76	\$4,525,272.00	
Less: Residential Concessions	\$0.00	\$0.00	\$0.00	
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Less: Residential Bad Debt	\$0.00	\$0.00	\$0.00	
Short Term Premiums	\$8,780.00	\$7,013.51	\$6,687.00	T6
Residential Net Rental Income	\$3,299,855.82	\$3,904,855.27	\$4,013,956.09	
Monthly Residential NRI	\$274,987.99	\$325,404.61	\$334,496.34	
Commercial Income	\$0.00	\$0.00	\$0.00	
Less: Commercial Vacancy	\$0.00	\$0.00	\$0.00	Commercial Vacancy
Commercial Net Rental Income	\$0.00	\$0.00	\$0.00	
Monthly Commercial NRI	\$0.00	\$0.00	\$0.00	
Coop Maint Fee	\$0.00	\$0.00	\$0.00	
Utility Reimbursement	\$8,500.26	\$20,524.33	\$20,524.33	T12
Laundry	\$14,102.68	\$19,102.67	\$19,102.67	T12
Parking	\$2,990.00	\$15,218.20	\$15,218.20	T12
Cable	\$0.00	\$0.00	\$0.00	
Miscellaneous Other Income	\$116,620.01	\$137,362.52	\$153,039.06	
Total Other Income	\$142,212.95	\$192,207.72	\$207,884.26	
EGI	\$3,442,068.77	\$4,097,062.99	\$4,221,840.35	
<b>Expenses</b>				
<b>Fixed Expenses</b>				
Real Estate Taxes	\$70,750.90	\$382,115.10	\$394,425.36	Current Escrow + 3%

**REVIEW UPDATED FINANCIALS**

Click "Submit" when you're ready to send the updated financials to the Freddie Mac producer.

Note: You cannot undo this action.

Note: Sensitive information has been censored throughout this training module.

← BACK  
Example Property Name

Summary Documents Borrower

### Loan Trackers

#### Loan Status Tracker

- Loan Submission**
  - ✓ Draft Created 03/25/2025
  - ✓ Loan Submitted 03/25/2025
- Quote**
  - Quoted
  - Quote Accepted
- Underwriting Package**
  - ⌚ UW Package Expected
  - UW Package Submitted
  - UW Package Checked In
- Letter of Commitment**
  - ⌚ Draft Commitment Expected
  - Draft Commitment Delivered
  - ⌚ Final Commitment Expected
  - Final Commitment Signed
  - Final Commitment Countersigned
- Lock**
  - ⌚ Lock Expected
  - Locked
  - ⌚ Spread Hold Expiration
- Funding**
  - Transferred to Purchase
  - ⌚ Final Delivery Package Required (MDD)
  - Final Delivery Package Received
  - Funded

#### Sub-Tracker

- Handoff**
  - Treasury Floor Date
  - Kickoff Call
  - Index Locked
- Inspection**
  - ⌚ Lender Scheduled Inspection
  - Lender Actual Inspection
  - ⌚ FM Scheduled Inspection
  - FM Actual Inspection
- Credit Approval**
  - ⌚ Final Approval Submission Expected
  - Final Approval Submitted
  - Final Approved
- Commitment Amendment**
  - Commitment Amendment Uploaded
- CDE Checklist Review**
- Closing**
  - ⌚ Closing Expected
  - Closed
  - ⌚ Expected First Payment Date
  - First Payment Date
- Legal**
  - ⌚ LIA Expected
  - LIA Delivered

### Summary Info

Name	Example Property Name
Address	
Opportunity ID	
FM Loan Number	
Loan Type	

### Deal Team Members

Freddie Mac Optigo Lender

No deal team members.

### Tasks

PENDING (3) COMPLETED (2)

#### Core Production Documents (3)

Posted: 05/14/25	Review updated financials - Rent Collections Updated: 5/14/25, 1:16 PM
Posted: 05/14/25	Review updated financials - Rent Roll Updated: 5/14/25, 1:16 PM
Posted: 03/25/25	Upload Mortgage Transaction Narrative Analysis Updated: 3/25/25, 11:43 AM

#### Underwriting Documents (0)

#### Commitment Documents (0)

## REVIEW UPDATED FINANCIALS

Return to the "Summary" page and complete this same review process with the other two outstanding tasks.

Completion of tasks is optional; you may choose to complete one or several tasks based on which financial data is required.

REVIEW  
REUPLOAD

UPLOAD

FREDDIE MAC OPTIGO LENDER

Note: Sensitive information has been censored throughout this training module.

### Loan Trackers

#### Loan Status Tracker

- ✓ Loan Submission
  - ✓ Draft Created 03/25/2025
  - ✓ Loan Submitted 03/25/2025
- Quote
  - Quoted
  - Quote Accepted
- Underwriting Package
  - UW Pac
  - UW Pac
- Letter of Commitment
  - Draft Co
  - Draft Co
  - Final Co
  - Final Co
  - Final Co
- Lock
  - Lock Ex
  - Locked
  - Spread Note Expiration
- Funding
  - Final Delivery Package Required (MDD)
  - Final Delivery Package Received
  - Funded

#### Sub-Tracker

##### Handoff

- Treasury Floor Date
- Kickoff Call
- Index Locked

##### Inspection

- 🕒 Lender Scheduled Inspection
- Lender Actual Inspection

- 🕒 LIA Expected
- LIA Delivered

### UPDATED FINANCIALS COMPLETE

Once you have finished reviewing and submitting each of the tasks for the desired updated financial data, you can view these tasks in the "Completed" tab of the "Tasks" card.

Note that this process can be repeated until the loan status is Quote Accepted.

Click to continue →

### Summary Info

Name

Address

Opportunity ID

FM Loan Number

Loan Type

### Deal Team Members

Freddie Mac Optigo Lender

Primary Producer

Secondary Producer

Primary Production Analyst

Secondary Production Analyst

Primary Underwriter

### Tasks

PENDING (2) COMPLETED (3)

#### Core Production Documents (3)

- ✓ Review updated financials - Rent Roll  
Updated: 11/21/25, 2:52 PM
- ✓ Review updated financials - I&E  
Updated: 5/14/25, 1:27 PM
- ✓ Upload Property Financials  
Updated: 5/14/25, 1:16 PM

#### Underwriting Documents (0)

#### Commitment Documents (0)

Diverse Borrower Certification CREATE NEW



You have reached the end of this training.