



SMALL BALANCE LOAN UPDATE

Freddie Mac Staff:

The email below will be sent externally to Multifamily customers and others who are subscribed to our news emails. You are receiving this email for information purposes only, and you may [update your email preferences](#) at any time.

Seller's Fee Certification

Effective Immediately – OptigoSM Sellers must submit the “SBL Seller Fee Certification Form” posted on the Freddie Mac SBL [website](#). This Certification is required to be delivered for all loans and will provide Freddie Mac with information about broker and correspondent fees paid by Sellers in connection with Small Balance Loans.

For example, a bank wealth management referral, an investment sales referral and a referral by a non-SBL Freddie Mac Seller are considered brokered/correspondent loans for this purpose. The form will be part of the full underwriting package uploaded to the Document Management System (DMS) and housed with the loan application.

We are working to incorporate this information into the Pipeline Management Tool (PMT) in an upcoming enhancement.

New Required Fields in the PMT

In addition to incorporating the pricing calculator into PMT, there are additional required fields in the Loan Terms tab (*see below*) when registering or pricing a loan effective February 11, 2019.

- Extended Delivery Period
- Co-Op
- AH Deal
- Qualified Uncapped (>50% of units)
- Qualified VLI (>50% of units)

SBL Calculator and Portfolio Management Tool (PMT) Merger Update

Reminder – PMT 6.0 goes live on Monday, February 11. PMT 6.0 will reflect real-time pricing and the all-in coupon rate as you register each loan – meaning no more standalone SBL Calculator.

Please note: It's important that each SBL Seller PMT administrator review employee access privileges prior to February 11, and make any necessary updates prior to the SBL Calculator integration.

We're offering two one-hour webinars to walk you through the new and improved PMT. Please make sure to register!

Date: Wednesday, February 6

Time: 2:00 p.m. ET

Click [here](#) to register.

Date: Thursday, February 14

Time: 2:00 p.m. ET

Click [here](#) to register.

Until PMT 6.0 is deployed, Sellers should continue to use the PMT and the SBL Calculator as usual.

Updated I&E Engine

We've published an updated and enhanced Income & Expense (I&E) Engine, with loans funded through January 1, 2019. The enhanced report provides more filtering capabilities and faster processing times.

Please note: This newer version of the I&E Engine is only compatible with MS Excel 2016.

For users with earlier versions of MS Excel, you can still use the existing I&E report, which has also been updated with the most recent comparables through January 1, 2019. Both reports can be found under "References & Tools" on our [website](#).



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