Fannie Mae®

Notification 23-14: Form 4097

Effective: 07/31/23
Retired: 01/31/24

Summary of Changes

HIGHLIGHTS
Effective for Mortgage Loans Committed as of July 31, 2023, updated the Multifamily Required Trade Information Documents: • Form 4097.Fixed; • Form 4097.ARM; and • Form 4097 Job Aid.

Primary Changes

- Added:
  - an Ownership Interest data field; and
  - allowable values for:
    - Cross-Default/Collateralization;
    - Affordable Housing Type to include "Other-Sponsor Dedicated Workforce"; and
    - Ownership Interest.
- Updated the Multifamily Required Trade Information Form 4097 Job Aid, providing guidance for the form changes.

Questions

Please contact Derrick Lindsey at (202) 752-2426, or derrick_m_lindsey@fanniemae.com, with any questions.

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