



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.