Fannie Mae®

Guide Update 25-08: Multifamily Required Trade Information (Form 4097)

Effective: 04/28/25
Retired: 06/04/25

Summary of Changes

HIGHLIGHTS
Effective for Mortgage Loans Registered as of April 28, 2025, updated the: • Multifamily Required Trade Information for Cash or MBS Mortgage Loans (Form 4097); and • Form 4097 Job Aid.

Primary Changes

- Consolidated the previous Fixed and ARM versions of the Multifamily Required Trade Information for Cash or MBS Mortgage Loans (Form 4097) into a single form.
- Updated the Form 4097 Job Aid clarifying you:
  - must submit Form 4097 via Excel (.xlsx) format;
  - must not add additional fields to Form 4097; and
  - may protect your Form 4097 Excel file as Read-Only and require a password for editing.
- Added a Form 4097 link in the:
  - Multifamily Additional Disclosure Guidance (Form 4098);
  - Multifamily MBS Roadmap; and
  - applicable Guide chapters.

Questions

Please contact Paul Konz at (202) 752-6645, or paul_m_konz@fanniemae.com, with any questions.

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