



## 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](mailto:derrick_m_lindsey@fanniemae.com), with any questions.