



# PE – Whole Loan Quick Start Checklist

This checklist references what's covered in the online Quick Start. Keep it handy as you prepare to use PE – Whole Loan for the first time.

## Preparing to Use PE – Whole Loan

This section of the Quick Start covered key steps you need to complete prior to using PE - Whole Loan for the first time.

### Ensure You Have Access to Fannie Mae Applications

- PE - Whole Loan
- Fannie Mae Connect
- Servicing-released Options
  - Servicing Marketplace (SMP)

### Know Your Execution Types

- Mandatory Commitments
- Best Efforts Commitments
- Servicing-released Commitments
- Pricing Reminders

### Complete Forms Needed for PE - Whole Loan

- Master Custodial Agreement, Form 2017
- Certificate of Authority, Incumbency & Specimen Signatures, Form 360
- Seller's Designation of Wire Transfer Instructions, Form 482
- Authorization of Automatic Transfer of Funds, Form 1072

## Practice Using PE – Whole Loan

This section of the Quick Start provided tutorials for you to practice using PE – Whole Loan.

### Logging in to PE - Whole Loan

### Setting up Contact Preferences

### Main Navigation

### Browsing Prices

### Making a Commitment

### Viewing Commitment Pipelines

### Managing Commitments

### Using Servicing Marketplace



## Next Steps

This section of the Quick Start covered key points to keep in mind once you've executed your commitment.

- Modifying Best Efforts Commitments in PE – Whole Loan
- Submitting via Loan Delivery

## Additional Resources

This section of the Quick Start covered provided helpful resources as you continue to use PE - Whole Loan.

### Resources

- PE - Whole Loan Learning Center
- PE - Whole Loan Portal Page
- Servicing Released Execution Portal Page
- Committing Grids in Pricing & Execution – Whole Loan
- Fannie Mae Selling Guide
- Fannie Mae Guide Forms
- Fannie Mae Connect
- Loan Delivery

### Who to Contact

Pricing, commitments, extensions, pair-offs: Capital Markets Pricing and Sales Desk	800-752-0257
Fannie Mae technology application assistance	800-2FANNIE(232-6643), press 1 and select option 1
Selling Guide questions	800-2FANNIE, press 1 and select option 2, then enter the first five digits of your Seller number
Loan Delivery & Custody Helpline	800-2FANNIE, press 1 and select option 4 email: <a href="mailto:acquisitions_loan_delivery@fanniemae.com">acquisitions_loan_delivery@fanniemae.com</a>
Bailee Letter or Certification Helpline	800-2FANNIE, press 1 and select option 5
Servicing Guide questions and servicing-related questions	800-2FANNIE, press 1 and select option 3 email: <a href="mailto:servicing_solutions@fanniemae.com">servicing_solutions@fanniemae.com</a>
Reporting, remitting and reconciliation assistance	800-2FANNIE, press 1 and select option 6 email: <a href="mailto:master_solutions@fanniemae.com">master_solutions@fanniemae.com</a>