Fannie Mae

Vendor Integration Profile Form

New Technology Service Providers

Please note that the information provided in this request is the source data for an internal Fannie Mae review; therefore, please be thorough as all responses will directly influence advancement through the process.

You will need to download and save this PDF prior to submission. Instructions for submission are on the final page of this form.

Company Overview

- **Legal company name**:

  Alias / Doing Business As *(if applicable):*

- **Company address**
  - **Address line 1:**
  - **Address line 2:**

  City: **State:** **Zip code:**

- **Parent company name** *(if applicable):*
- **Form of organization:**
- **State your company is organized in:**
- **Company website URL**:
- **Number of years in business**:
- **Regions of business operations** *(e.g., AMER, EMEA, APAC):*
- **Is your company a consumer reporting agency, per the Federal Fair Credit Reporting Act (FCRA)?** N/A
- **Business overview:** *(e.g. business model, business objective, primary markets served, etc.)*

- **Top 3-5 mortgage lender customers & contact info who are actively using your product**
  Please list only customers who are approved Fannie Mae seller/servicers. Mutual customers and POC names/email addresses are mandatory to be considered for integration. Fannie Mae will confuct customer validation by contacting the POC provided below.

Mortgage lender name:	Contact name:	Contact email address:	Months leveraging your product:

- **Average transactions/loan volume per quarter:**
- **Average traffic/request volume per day** *(applicable to capital markets):*
- **Total active records on your platform** *(applicable to verification providers):*
- **Provide a list of existing and pipeline vendor partner integrations** *(e.g. POS, LOS):*
  If pipeline partners are provided, please provide anticipated production date.
- **Provide a list of resellers of your product/service** *(if applicable):*
- **What business channels do you support?**

☐ Retail	☐ Wholesale	☐ Correspondent	☐ Other

- **How would you define your product suite offering?**
- **Does your company provide outsourced fulfillment services? (e.g. contract underwriting, loan processing, etc.)**
  ☐ Yes ☐ No
- **If so, please provide more detail about your service offering.**

Fannie Mae Integration/Certification

- **What Fannie Mae product(s) do you want to integrate or leverage?** *Fannie Mae Products can be viewed* ***HERE***

☐	API Access	☐	EarlyCheck™	☐	Uniform Collateral Data Portal (UCDP)	☐	Pricing & Execution – Whole Loan® (PE-WL)
☐	Desktop Originator® (DO®)	☐	Desktop Underwriter® (DU®)	☐	DU® Validation Service	☐	Servicing Management Default Underwriter™ (SMDU™)
☐	eMortgage	☐	Loan Activity Reporting (LAR)	☐	Loan Servicing Data Utility (LSDU)	☐	Uniform Closing Dataset Collection (UCD)

- **If API access was selected, which APIs?** *Fannie Mae APIs can be viewed* ***HERE***

- **If DU Validation Service was selected, which service?**

☐	Asset	☐	Employment	☐	Income	☐	Tax Transcripts (4506-C)

- **Desired integration start date:**
- **Business use case for integrating to selected product(s):**

Company Product(s)/Service(s)

- **Please describe your company's product(s) and/or service(s) for integration.**
  - **Product/Service Name:**
  - **Product Version/Release Number:**
  - **Brief Product/Service Description** *(Please include any product differentiators):*

  - **Which Fannie Mae product(s) do you want to integrate or leverage with this specified product?**

- **If interested in DU Validation Service, provide a list of existing and pipeline data sources (i.e. payroll providers, financial institutions, IRS) integrated to this specified product:**
  If pipeline data sources are provided, please provide anticipated production date.

- **OPTIONAL: If there are additional products you plan to integrate with Fannie Mae, list them below.**
  - **Product/Service Name:**
  - **Product Version/Release Number:**
  - **Brief Product/Service Description** *(Please include any product differentiators):*
  - **Which Fannie Mae product(s) do you want to integrate or leverage with this specified product?**
  - **If interested in DU Validation Service, provide a list of existing and pipeline data sources (i.e. payroll providers, financial institutions, IRS) integrated to this specified product:**
    If pipeline data sources are provided, please provide anticipated production date.

Contact Information

- **Primary Fannie Mae Liaison** – *if approved, this individual will be our primary relationship manager at your company*
  - Contact Name:
  - Title/Position:
  - Email Address:
  - Phone Number:
- **Primary Technical Integration Lead** – *if approved, this individual will be our primary contact for all technical questions during the integration process*
  - Contact Name:
  - Title/Position:
  - Email Address:
  - Phone Number:

- **Legal Documents Signer Contact** – *if approved, this individual (VP-level or higher) is acknowledged by you to be authorized to sign legal documents*
    - Contact Name:
    - Title/Position:
    - Email Address:
    - Phone Number:

- **Contract Administrator** – *if approved, copies of signed legal documents will be sent to this contact*
    - Contact Name:
    - Title/Position:
    - Email Address:
    - Phone Number:

Leadership Contacts:

- **Chief Executive Officer Name**:
    - Email Address:
    - Phone Number:
- **Chief Technology Officer Name:**
    - Email Address:
    - Phone Number:
- **Chief Marketing Officer Name:**
    - Email Address:
    - Phone Number:

Technical Background

- **Does your platform use the following?**
    - XML:
    - Web services:
    - Web API:
    - OAuth authorization:
    - MISMO file format:

- **Technical tool available for file validation and/or B2B connection testing.**
    - XML Spy, or similar product?
    - Beyond Compare, or similar product?
    - Postman, SOAPUI, or similar rest client product?
    - If not using the above tools, what tools does your company use?

- **If interested in the DU Validation Service, how is borrower data retrieved from the data source?**
    - **If automated, what methodology is used to retrieve borrower data from the source (e.g. API, SFTP)?**

- **Technical resource staffing plan:**
    - **If third party, please provide us with a company name and contact**.
      Please note that before beginning an integration, an NDA between Fannie Mae and the third party must be signed.
        - Company name:
        - Company address:
        - Company contact name:
        - Company contact email address:

- **How many technical resources will be dedicated to assisting in the development and ongoing support of this integration?**

- **Key methodologies** – *briefly describe your various methodologies*
    - **Project management methodology**:
    - **Software development methodology**:
    - **Release management process/cadence**:
      Please note that Fannie Mae periodically makes changes to its products that require integrators to make updates within 120 days of announcement.

- **Do you plan to create workflows from the results?**

- **Provide group email addresses that Fannie Mae should use to send:**
    - **System outages:**
    - **Fannie Mae product release notifications:**

Risk Management

- **Does your company have audited, or third party compiled unaudited financials for the last two years?**

- **Does your company have an Information Security Certification (SOC-2 Type-2 or equivalent) for a minimum 6-month assessment period?**

    - **If yes, please provide the assessment completion date**:

    - **If no SOC-2 Type-2, please provide the type of certification and coverage**:

- **Over the next six months, will your company be merging with, be acquired by, or acquire any other entities?**

Once completed, email the Fannie Mae Digital Alliances Team and please submit:

1. Your New Vendor Profile Form (Download, save, and attach this document)
2. Proposed workflow (diagram/visual or in writing) and business use case to describing how the Interface will be implemented by Integrator and used by our customers.
3. Other supporting documents you would like to provide (optional)

The Fannie Mae Digital Alliances Team will reach out within 3 business days with next steps. If you have not heard back in 3 business days, please contact the **Fannie Mae Digital Alliances Team** to ensure your Vendor Profile Form was received.