**INSTRUCTIONS:** The following information is provided to assist you in completing this form. The definitions below correspond to the specified areas on the attached form. Please make sure the information is legible and correct.

* **Add/Modify User –** Check this box if you are adding a new user or modifying an existing user (e.g., changing roles or contact information)
* **Delete User –** Check this box if you are deactivating a user, even temporarily (then reinstate them with an “Add” action)
* You may assign multiple roles to each user.
* Password resets will be required every 90 days, and reactivation will be required if the user does not log in for 120 days.

When complete, email this form to Freddie Mac at [CSA\_Operations@freddiemac.com](mailto:CSA_Operations@freddiemac.com).

|  |  |
| --- | --- |
| **Definition of Giant Roles** | |
| Manage Giant/Supers Trade | User can request Giants/Supers and modify terms (where permitted by the system) and access to Giant pricing features, which are required for all who need to manage Giant trades.  User can create Giants/Supers via the collateral Bulk Upload feature. |
| Manage Giant/Supers Collateral | User can add/overwrite Giant/Supers collateral lists and view validation edit results |
| **Definition of CMO/REMIC Roles** | |
| Dealer REMIC | User can utilize available CMO/REMICs tools |
| **Definition of Exchange Roles** | |
| Manage Exchange Trade | User can request access to create and modify Exchange transactions. |

As the Authorized Representative, I hereby certify and agree that the employees identified below are authorized to use Dealer Direct in the User Roles to which each has been assigned.

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Printed Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Dealer Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(the “Dealer”)** | | | | | | |
| This form must be submitted by a Dealer’s duly authorized representative who has completed the **Freddie Mac Authorized Dealer Representative Agreement** form. | | | | | | |
| **Dealer’s Duly Authorized Representative:** | | |  | **Title:** | | |
| **Phone Number:** | | | **( )** | **Email Address:** | | |
| **Add/ Modify User** | **Delete User** | **Authorized User**  **Names and email Addresses:**  *(Attach additional forms if necessary.)* | | **User Role(s): Select A (Add role) or D (Delete role)** | | |
| Giant/Supers Roles *Access to trading and collateral delivery for Giants/Supers* | CMO/REMIC Roles *Access to REMIC tools* | Exchange Role *Access to create and modify exchange transactions* |
|  |  | Name: | | **Manage Giant/Supers Trade**  **TC External Giant Marketer**  *CSA Note: Both of the above roles are required for set-up when Manage Giant Trade is selected.*  **Manage Giant/Supers Collateral** | **Dealer REMIC** | **Manage Exchange Trade** |
| Email: | |
| Phone: | |
|  |  | Name: | | **Manage Giant/Supers Trade**  **TC External Giant Marketer**  *CSA Note: Both of the above roles are required for set-up when Manage Giant Trade is selected.*  **Manage Giant/Supers Collateral** | **Dealer REMIC** | **Manage Exchange Trade** |
| Email: | |
| Phone: | |
|  |  | Name: | | **Manage Giant/Supers Trade**  **TC External Giant Marketer**  *CSA Note: Both of the above roles are required for set-up when Manage Giant Trade is selected.*  **Manage Giant/Supers Collateral** | **Dealer REMIC** | **Manage Exchange Trade** |
| Email: | |
| Phone | |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Dealer Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(the “Dealer”)** | | | | | | |
| This form must be submitted by a Dealer’s duly authorized representative who has completed the **Freddie Mac Authorized Dealer Representative Agreement** form. | | | | | | |
| **Dealer’s Duly Authorized Representative:** | | |  | **Title:** | | |
| **Phone Number:** | | | **( )** | **Email Address:** | | |
| **Add/ Modify User** | **Delete User** | **Authorized User**  **Names and email Addresses:**  *(Attach additional forms if necessary.)* | | **User Role(s): Select A (Add role) or D (Delete role)** | | |
| Giant/Supers Roles *Access to trading and collateral delivery for Giants/Supers* | CMO/REMIC Roles *Access to REMIC tools* | Exchange Role *Access to create and modify exchange transactions* |
|  |  | Name: | | **Manage Giant/Supers Trade**  **TC External Giant Marketer**  *CSA Note: Both of the above roles are required for set-up when Manage Giant Trade is selected.*  **Manage Giant/Supers Collateral** | **Dealer REMIC** | **Manage Exchange Trade** |
| Email: | |
| Phone: | |
|  |  | Name: | | **Manage Giant/Supers Trade**  **TC External Giant Marketer**  *CSA Note: Both of the above roles are required for set-up when Manage Giant Trade is selected.*  **Manage Giant/Supers Collateral** | **Dealer REMIC** | **Manage Exchange Trade** |
| Email: | |
| Phone: | |
|  |  | Name: | | **Manage Giant/Supers Trade**  **TC External Giant Marketer**  *CSA Note: Both of the above roles are required for set-up when Manage Giant Trade is selected.*  **Manage Giant/Supers Collateral** | **Dealer REMIC** | **Manage Exchange Trade** |
| Email: | |
| Phone | |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Dealer Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(the “Dealer”)** | | | | | | |
| This form must be submitted by a Dealer’s duly authorized representative who has completed the **Freddie Mac Authorized Dealer Representative Agreement** form. | | | | | | |
| **Dealer’s Duly Authorized Representative:** | | |  | **Title:** | | |
| **Phone Number:** | | | **( )** | **Email Address:** | | |
| **Add/ Modify User** | **Delete User** | **Authorized User**  **Names and email Addresses:**  *(Attach additional forms if necessary.)* | | **User Role(s): Select A (Add role) or D (Delete role)** | | |
| Giant/Supers Roles *Access to trading and collateral delivery for Giants/Supers* | CMO/REMIC Roles *Access to REMIC tools* | Exchange Role *Access to create and modify exchange transactions* |
|  |  | Name: | | **Manage Giant/Supers Trade**  **TC External Giant Marketer**  *CSA Note: Both of the above roles are required for set-up when Manage Giant Trade is selected.*  **Manage Giant/Supers Collateral** | **Dealer REMIC** | **Manage Exchange Trade** |
| Email: | |
| Phone: | |
|  |  | Name: | | **Manage Giant/Supers Trade**  **TC External Giant Marketer**  *CSA Note: Both of the above roles are required for set-up when Manage Giant Trade is selected.*  **Manage Giant/Supers Collateral** | **Dealer REMIC** | **Manage Exchange Trade** |
| Email: | |
| Phone: | |
|  |  | Name: | | **Manage Giant/Supers Trade**  **TC External Giant Marketer**  *CSA Note: Both of the above roles are required for set-up when Manage Giant Trade is selected.*  **Manage Giant/Supers Collateral** | **Dealer REMIC** | **Manage Exchange Trade** |
| Email: | |
| Phone | |