

# INTAKE FORM

## Home Purchase Planning

**CONTACT INFORMATION**

First \_\_\_\_\_ Last \_\_\_\_\_ Middle \_\_\_\_\_

Street \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

( \_\_\_\_\_ ) \_\_\_\_\_ - \_\_\_\_\_ ( \_\_\_\_\_ ) \_\_\_\_\_ - \_\_\_\_\_ ( \_\_\_\_\_ ) \_\_\_\_\_ - \_\_\_\_\_  
 Home Work Other/Cell

**Preferred Contact Type**

Email                       Home Phone                       Work Phone                       Cell Phone

Preferred Language in Household \_\_\_\_\_ Email \_\_\_\_\_

**CASE DATA**

**Total Number of Co-Applicants**     1     2     3     4     5

**Referral Source: How did you hear about us? (Check all that apply)**

<input type="checkbox"/> Staff/Board Member	<input type="checkbox"/> NW Sac Website	<input type="checkbox"/> News Article	<input type="checkbox"/> Radio
<input type="checkbox"/> Family/Friend	<input type="checkbox"/> Oak Park Farmers Market	<input type="checkbox"/> Sac Bee - Class Schedule	<input type="checkbox"/> Weed & Seed
<input type="checkbox"/> Walk-In	<input type="checkbox"/> Bank of America	<input type="checkbox"/> TV	<input type="checkbox"/> Other
<input type="checkbox"/> HUD	<input type="checkbox"/> Lender	<input type="checkbox"/> Univision 19	
<input type="checkbox"/> SHRA	<input type="checkbox"/> Realtor	<input type="checkbox"/> City of _____	

**Race (Check all that apply)**

<input type="checkbox"/> American Indian/Alaskan Native	<input type="checkbox"/> Native Hawaiian/Pacific Islander
<input type="checkbox"/> Asian	<input type="checkbox"/> White
<input type="checkbox"/> Black/African American	<input type="checkbox"/> Other/Multiple Race
<input type="checkbox"/> Hispanic	

**How many people are in your home?** \_\_\_\_\_

Gender	<input type="checkbox"/> Male	<input type="checkbox"/> Female
Who is considered the Head of Household?	<input type="checkbox"/> Applicant	<input type="checkbox"/> Co-Applicant
Are you a Veteran?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are you Foreign Born?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

**Age** \_\_\_\_\_ **Birth Date** \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_

Are you Disabled?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Is your Dependent Disabled?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

**CASE DATA (continued)**

**Education**

- College       High School/GED       None  
 Primary       Vocational

**Marital Status**

- Single       Married

**What is your approximate yearly income?**

\$ \_\_\_\_\_

**What County do you currently live in?**

\_\_\_\_\_

Current Residence?

- Own       Rent

Are you a First-Time Homebuyer?

- Yes       No

Are you a First Generation Homebuyer?

- Yes       No

**Social Security Number**

\_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

**CO-APPLICANT**

\_\_\_\_\_  
First Last Middle

\_\_\_\_\_  
Street

\_\_\_\_\_  
City State Zip Code

(\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_  
Home Work Other/Cell

Are you Disabled?

- Yes       No

**Social Security Number**

\_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

**Relationship to Primary Customer**

- Brother       Employer       Father       Husband  
 Mother       Sister       Wife       Other

**Race (Check all that apply)**

- American Indian/Alaskan Native       Native Hawaiian/Pacific Islander  
 Asian       White  
 Black/African American       Other/Multiple Race  
 Hispanic

**Birth Date**      \_\_\_\_/\_\_\_\_/\_\_\_\_

\_\_\_\_\_  
Email

Gender

- Male       Female

Are you a Veteran?

- Yes       No

Are you Foreign Born?

- Yes       No

## ADDITIONAL INFORMATION

### Household Type

- Female-headed single-parent       Married with dependents       Single Adult  
 Male-headed single-parent       Married without dependents       Two or more unrelated adults  
 Other

### Housing Arrangement

- Rent       Does not pay rent

## LENDER INFORMATION (optional)

\_\_\_\_\_  
Lender

\_\_\_\_\_  
Loan Officer

\_\_\_\_\_  
Phone Number

## ESCROW INFORMATION (optional)

\_\_\_\_\_  
Title Company

\_\_\_\_\_  
Escrow Number

\_\_\_\_\_  
Escrow Officer

\_\_\_\_\_  
Phone Number

## SERVICE DISCLOSURE (Please Review)

NeighborWorks® HomeOwnership Center Sacramento Region is a housing counseling agency, certified by the Department of Housing and Urban Development (HUD), to offer assistance in guiding you through the process of Homeownership. We believe that homeownership should promote stability for you, your family and the neighborhood in which you choose to live.

Our goal is to assist you in:

- ~ Understanding affordable homeownership and lending options.
- ~ Identifying any obstacles you may face in obtaining a mortgage that promotes stability.
- ~ Setting Homeownership goals, establishing a plan of action to help you reach your goals, and provide continued support in the way of pre-purchase and post purchase counseling.

**You have a right to choose your own real estate agent, lending institution, and all other real estate industry professionals. Taking part in our group or individual counseling services does not require you to use any of our real estate or mortgage services, or use the services of anyone that we may refer to you.**

## SIGNATURE

I authorize NeighborWorks® HomeOwnership Center Sacramento Region :

- ~ Obtain a copy of the HUD-1 Settlement Statement when I purchase a home from the lender who made the loan or the title company that closed the loan.
- ~ Pull my credit report to review my credit file for housing counseling in connection with my pursuit on a loan to purchase real property.

\_\_\_\_\_  
**Customer**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Joint Customer**

\_\_\_\_\_  
**Date**

The information we collect through our Intake Form is used to aid us in assisting you and evaluating our programs and services. Unless you provide direct written consent we do not disclose your personal information to any unaffiliated third parties other than for required program auditing. If you have any questions or concerns please feel free to discuss them with any of our Homeownership Counselors.



**Thank you for visiting NeighborWorks® HomeOwnership Center Sacramento Region**

\_\_\_\_\_  
FOR OFFICE USE ONLY

\_\_\_\_\_  
Assigned Counselor

\_\_\_\_\_  
Service Type