



## INTAKE FORM

Please answer these questions before coming to the Intake Session

### Primary Borrower

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1. Last Name \_\_\_\_\_
2. First Name \_\_\_\_\_
3. Middle Name \_\_\_\_\_
4. Suffix (Sr., Jr., etc.) \_\_\_\_\_
5. SS# \_\_\_\_\_
6. Home Phone \_\_\_\_\_
7. Alternate Phone \_\_\_\_\_
8. E-Mail Address \_\_\_\_\_
9. Birth Date \_\_\_\_\_
10. # of Dependents \_\_\_\_\_
11. Gender           Female \_\_\_\_\_           Male \_\_\_\_\_
12. Marital Status   Married \_\_\_\_\_       Separated \_\_\_\_\_       Unmarried \_\_\_\_\_
  
13. Special Designation   Single Head of Household \_\_\_\_\_       US Veteran \_\_\_\_\_  
                                  Female Head of Household \_\_\_\_\_       1<sup>st</sup> Time Home Buyer \_\_\_\_\_  
                                  Owned Home in last 3 years \_\_\_\_\_
14. Ethnicity (choose 1)   Hispanic \_\_\_\_\_                               Not Hispanic \_\_\_\_\_
  
15. Race                    American Indian \_\_\_\_\_   Asian \_\_\_\_\_   Black or African American \_\_\_\_\_  
                                  Native Hawaiian or Other Pacific Islander \_\_\_\_\_   White \_\_\_\_\_
  
16. Citizenship            U.S. Citizen \_\_\_\_\_       Permanent Resident \_\_\_\_\_   Non-Resident \_\_\_\_\_

# INTAKE FORM

## Co-Borrower

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17. Last Name \_\_\_\_\_

18. First Name \_\_\_\_\_

19. Middle Name \_\_\_\_\_

20. Suffix (Sr., Jr., etc.) \_\_\_\_\_

21. Social Security # \_\_\_\_\_

22. Home Phone \_\_\_\_\_

23. Alternate Phone \_\_\_\_\_

24. E-Mail Address \_\_\_\_\_

25. Birth Date \_\_\_\_\_

26. # of Dependents \_\_\_\_\_

27. Gender Female \_\_\_\_\_ Male \_\_\_\_\_

28. Marital Status Married \_\_\_\_\_ Separated \_\_\_\_\_ Unmarried \_\_\_\_\_

29. Special Designation Single Head of Household \_\_\_\_\_ US Veteran \_\_\_\_\_  
Female Head of Household \_\_\_\_\_ 1<sup>st</sup> Time Home Buyer \_\_\_\_\_  
Owned Home in last 3 years \_\_\_\_\_

30. Ethnicity Hispanic \_\_\_\_\_ Not Hispanic \_\_\_\_\_

31. Race American Indian \_\_\_\_\_ Asian \_\_\_\_\_ Black or African American \_\_\_\_\_  
Native Hawaiian or Other Pacific Islander \_\_\_\_\_ White \_\_\_\_\_

32. Citizenship U.S. Citizen \_\_\_\_\_ Permanent Resident \_\_\_\_\_ Non-Resident \_\_\_\_\_

# INTAKE FORM

## Address Information

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### Current Address of Primary Borrower

33. Street Address \_\_\_\_\_  
34. City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
35. County \_\_\_\_\_ Mo. Rent/Mortgage \$ \_\_\_\_\_  
36. Residency Status Rent \_\_\_\_\_ Own \_\_\_\_\_ Other \_\_\_\_\_  
37. Length of Occupancy #Years \_\_\_\_\_ # Months \_\_\_\_\_

### Previous Address of Primary Borrower (if within last 2 years)

38. Street Address \_\_\_\_\_  
39. City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
40. County \_\_\_\_\_ Mo. Rent/Mortgage \$ \_\_\_\_\_  
41. Residency Status Rent \_\_\_\_\_ Own \_\_\_\_\_ Other \_\_\_\_\_  
42. Length of Occupancy #Years \_\_\_\_\_ #Months \_\_\_\_\_

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### Current Address of Co-Borrower

43. Is Co-Borrower address.... Same? \_\_\_\_\_ Different \_\_\_\_\_  
*(If different, answer 44-38)*

44. Street Address \_\_\_\_\_  
45. City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
46. County \_\_\_\_\_ Mo. Rent/Mortgage \$ \_\_\_\_\_  
47. Residency Status Rent \_\_\_\_\_ Own \_\_\_\_\_ Other \_\_\_\_\_  
48. Length of Occupancy #Years \_\_\_\_\_ # Months \_\_\_\_\_

### Previous Address of Primary Borrower (if within last 2 years)

49. Was Co-Borrower's previous address.... Same \_\_\_\_\_ Different \_\_\_\_\_  
*(If same, skip to 55)* *(If different, answer 50-54)*

50. Street Address \_\_\_\_\_  
51. City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
52. County \_\_\_\_\_ Mo. Rent/Mortgage \$ \_\_\_\_\_  
53. Residency Status Rent \_\_\_\_\_ Own \_\_\_\_\_ Other \_\_\_\_\_  
54. Length of Occupancy #Years \_\_\_\_\_ #Months \_\_\_\_\_

**INTAKE FORM**

**Employment Information**

Current Employment of Primary Borrower

55. Employer Name \_\_\_\_\_  
56. Street Address \_\_\_\_\_  
57. City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
58. Position/Title \_\_\_\_\_  
59. Employment Dates with Co. Start Date \_\_\_\_\_ End Date \_\_\_\_\_  
60. Self Employed Yes \_\_\_\_\_ No \_\_\_\_\_ Phone \_\_\_\_\_

Previous Employment of Primary Borrower (If within last 2 years)

61. Employer Name \_\_\_\_\_  
62. Street Address \_\_\_\_\_  
63. City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
64. Position/Title \_\_\_\_\_  
65. Employment Dates with Co. Start Date \_\_\_\_\_ End Date \_\_\_\_\_  
66. Self Employed Yes \_\_\_\_\_ No \_\_\_\_\_ Phone \_\_\_\_\_

Current Employment of Co-Borrower

67. Employer Name \_\_\_\_\_  
68. Street Address \_\_\_\_\_  
69. City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
70. Position/Title \_\_\_\_\_  
71. Employment Dates with Co. Start Date \_\_\_\_\_ End Date \_\_\_\_\_  
72. Self Employed Yes \_\_\_\_\_ No \_\_\_\_\_ Phone \_\_\_\_\_

Previous Employment of Co-Borrower (If within last 2 years)

73. Employer Name \_\_\_\_\_  
74. Street Address \_\_\_\_\_  
75. City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
76. Position/Title \_\_\_\_\_  
77. Employment Dates with Co. Start Date \_\_\_\_\_ End Date \_\_\_\_\_  
78. Self-Employed Yes \_\_\_\_\_ No \_\_\_\_\_ Phone \_\_\_\_\_



Do you have any familial relationship with any employee and/or board member of Lower 9th Ward NENA?

Failure to disclose could result in your disqualification. YES \_\_\_\_\_ -- or -- NO \_\_\_\_\_?

If YES, then please describe: \_\_\_\_\_

\_\_\_\_\_  
Primary Borrower Signature Date

\_\_\_\_\_  
Secondary Borrower Signature Date

Referral Source: \_\_\_\_\_  
Name Phone #

\_\_\_\_\_  
E-Mail

\_\_\_\_\_  
Housing Counselor Signature Date

Office Use Only:

- Counselor Max Entered: \_\_\_\_\_
- HCS # \_\_\_\_\_
- Assessment: \_\_\_\_\_
- Credit Report
- First Time Home Buyer Class \_\_\_\_\_
- Financial Literacy Class