



# WCMCA HOMEBUYER COUNSELING INTAKE FORM

Case Number _____	<input type="checkbox"/> In- Person counseling
Date of Intake: _____	<input type="checkbox"/> Telephone Counseling

**Instructions:** Please fill out as completely as possible. If you need additional space, please feel free to use the back side or make additional copies as necessary. Please include your past 3 month's income verification.

### Individual #1

Name: \_\_\_\_\_  
(Please print) First MI Last

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Zip: \_\_\_\_\_ County: \_\_\_\_\_

Home Phone: \_\_\_\_\_

Work Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

### Individual #2

Name: \_\_\_\_\_  
(Please print) First MI Last

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Zip: \_\_\_\_\_ County: \_\_\_\_\_

Home Phone: \_\_\_\_\_

Work Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Race: \_\_\_\_\_ Highest Level of Education: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Disabled: \_\_\_\_\_

Relationship to Individual #1: \_\_\_\_\_

### Individual #1 (only) please continue:

1. How did you hear about this counseling?

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Mailer, Flyer, or Brochure  | <input type="checkbox"/> Newspaper                 | <input type="checkbox"/> Agency (which one: _____) |
| <input type="checkbox"/> Friend or Relative          | <input type="checkbox"/> Internet                  | <input type="checkbox"/> Realtor                   |
| <input type="checkbox"/> Someone who took a workshop | <input type="checkbox"/> Lender / Mortgage company | <input type="checkbox"/> Other: _____              |

2. Your ethnicity:  Hispanic, Latino, or Spanish  Non-Hispanic

3. Race: (select one)

*Single Race*

- American Indian / Alaskan Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White

*Multiple Race*

- American Indian / Alaskan Native & White
- American Indian / Alaskan Native & Black
- Asian & White
- Black or African American & White
- Native Hawaiian/Other Pacific Islander & Black
- Other race: \_\_\_\_\_

4. How many people will live in the house? \_\_\_\_\_

5. Gender:  Male  Female

6. Your age: \_\_\_\_\_

7. Are you disabled?  Yes  No

8. Are you a single parent household?  Yes  No

**Information about Individual #1 (continued):**

9. Please check the highest education level you completed:

- Some high school                       Some college or trade school                       Bachelor's degree  
 High school diploma / GED                       Associates degree                       Graduate or professional degree

10. Marital Status:     Single     Married     Divorced     Widow

11. Income. Please include income for all individuals from all sources (*work, disability, child support, investment income, etc.*)

Name (person receiving income)	Income Source	Net Monthly Income (after taxes)
		\$
		\$
		\$
		\$

12. Current housing:     Rent     Own     Staying with family / friends

13. Are you a first time home buyer?     Yes     No    (You have not owned a home for the past three years.)

14. Are you a first generation home buyer?     Yes     No    (Your parents did not own their own home.)

15. How many dependent children under 18 years of age live in the house? \_\_\_\_\_

Child's Name	Date of Birth	Disability	Race

16. Current household rent / mortgage payment: \$ \_\_\_\_\_ / month.

17. Did you complete a Home Stretch Workshop?     No     Yes: Location & Dates: \_\_\_\_\_

18. Have you applied for a mortgage loan or have you signed a purchase agreement?     Yes     No

19. Have you experienced a home foreclosure within the past 3 years?     Yes     No

**If you answered yes to question 18, please complete the purchase property information for your new home here:**

Purchase property address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Purchase price: \$ \_\_\_\_\_

Loan amount: \$ \_\_\_\_\_ Loan interest rate: \_\_\_\_\_ % Closing date: \_\_\_\_\_

Lender (Bank/Mortgage Co.): \_\_\_\_\_ Loan program (FHA, RD, etc): \_\_\_\_\_

**PRE-PURCHASE COUNSELING INTAKE – DISCLOSURE**

**Disclosure Statement**

While you may learn about the advantages/disadvantages of specific loan products during this counseling session, you are free to choose lenders, loan products and homes of your own choosing regardless of the recommendations made by the counselor. By signing below, you acknowledge that you have received and read this disclosure notice.

\_\_\_\_\_  
**Signature, Individual 1**

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

\_\_\_\_\_  
**Signature, Individual 2**

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

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\_\_\_\_\_  
**Signature, Individual 1**

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

\_\_\_\_\_  
**Signature, Individual 2**

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