

PERSONAL PROFILE INTAKE FORM

Client Number: _____ Date of Intake: _____ Counselor: _____	<input type="checkbox"/> Pre-purchase Counseling <input type="checkbox"/> Homebuyer Education <input type="checkbox"/> Post-purchase Education <input type="checkbox"/> Tenant's Rights	<input type="checkbox"/> Financial Literacy <input type="checkbox"/> Foreclosure Prevention <input type="checkbox"/> Financial Capability <input type="checkbox"/> _____
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Instructions: Please fill out as completely as possible.

Individual #1

Name: _____
(Please print) First MI Last

Address: _____

Zip: _____ City: _____

State: _____ County: _____

Home/Cell Phone: _____

Work Phone: _____

Email: _____

Individual #2

Name: _____
(Please print) First MI Last

Address: _____

Zip: _____ City: _____

State: _____ County: _____

Home/Cell Phone: _____

Work Phone: _____

Relationship to Individual #1: _____

Email: _____

Individual #1 (only) please continue:

1. How did you hear about us?

- | | | |
|--|--|--|
| <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. 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: _____

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

4. Gender: Male Female
5. Are you a veteran? Yes No Are you active duty military? Yes No
6. Are you a single parent household? Yes No
7. Do you need a language interpreter? Yes No Primary Language spoken: _____
8. Individual #1 Age: _____ Date of Birth: _____ Individual #2 Age: _____ Date of Birth: _____
9. Are you disabled? Yes No
10. 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
11. Marital Status: Single Married Divorced Widow Separated
12. Are you a first time home buyer? Yes No (You have not owned a home for the past three years.)
13. Are you a first generation home buyer? Yes No (Your parents did not own their own home.)
14. Current housing: Rent Own Staying with family / friends How long? _____
15. Current household rent / mortgage payment: \$ _____ / month
16. How many people will live in the house? _____
17. How many are children under 18? _____ (#) _____ (ages)
18. Have you completed a Home Stretch Workshop? No Yes: Location & Dates: _____
19. Have you applied for a mortgage loan or have you signed a purchase agreement? Yes No

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If you answered yes to question 19, 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): _____

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ADDITIONAL INFORMATION:

