



STAFF USE: Appointment scheduled _____
 Documents Given (Date) _____
 If not; Pre-Adv. Action (Date): _____
 Adv. Action Letter _____ (w/in 5 days of pre)
 SS entry _____ (initial when complete)

Updated 3/03/20 dj

Customer Intake Form

Mark one or both, if applicable _____ Bend _____ Redmond
 Online Video Code: _____ (verification of review)

This form is **NOT** considered an application for the housing program

Along with this form please turn in 1-3 recent paystub copies or verification of income for each customer

PRIMARY CUSTOMER INFORMATION

Please Print Clearly

Name: _____
 First MI Last

Street

City

State

Zip Code

Phone: (____) _____ - _____ Email: _____

Ethnicity (please circle): Hispanic/Latino Non-Hispanic/Latino

Race (please circle): American Indian or Alaska Native Asian Black or African American
 Native Hawaiian or Other Pacific Islander White Other 2 or more races

Citizenship (please select one):

1. You are a Citizen or National of the United States
3. You are foreign born and a U.S. Resident (*green card holder*)
4. You are a Noncitizen with eligible status as evidenced by one of the documents listed below
 - Form I551-Alien Registration Receipt Card (for permanent resident aliens)
 - Form I-94, Arrival-departure record
 - A final court decision or DHS letter granting asylum
5. None of the above – Not contending eligible immigration status, no further information required and the person named above understands they are not eligible for program selection but agrees to start housing counseling while immigration status changes.

Marital Status (please circle): Single Married Divorced Separated Widowed

Gender (please circle): Male Female Other

Disability? Yes No **Veteran?** Yes No

Current Housing Arrangement (please check one):

Rent Homeless Living with family member and not paying rent Living with friends or roommates, sharing rent

Health Insurance

Do you currently have health insurance? If no, what prohibits you? Yes No

First time Buyer

Do you currently own a home, or have owned a home in the past three years? Yes No

Household Type (please select the most accurate)?

Female headed single parent household Male headed single parent household Single adult

Two or more unrelated adults Married with children Married without children Other

Family/Household Size: _____ (include those that will be living in the home for more than 6 months of the year)
How many dependents (those claimed on taxes or legal guardian and other than those listed by any co-borrower)? _____
What ages are they? _____

Do all dependents have healthcare insurance? Yes No
If no, please explain: _____

Are there non-dependents who will be living in the home? Yes No
If yes, list below:

Relationship Age Relationship Age

Note: All non-dependent adults over 18 years old, living in the household must fill in and submit the Co-Applicant Information on this form. Please request additional forms if needed.

Education (please circle one):
Below High School Diploma High School Diploma or Equivalent
Two-Year College Bachelors Degree
Masters Degree Above Masters Degree

Referred to by (please circle all that apply):
Print Ad / Newspaper Bank/Other Agency Habitat Partner Realtor Facebook Employer
Staff/Board member Walk-In Family/Friend TV /Radio Realtor Other
If you were referred by a **bank, Habitat Partner or Realtor**, which one? _____

PRIMARY CUSTOMER EMPLOYMENT — Last 2 Years *Please Print Clearly*

Primary Employer: _____ **Work Phone:** (____) _____ - _____

Title Hire Date
Work Address Street City State Zip Code

Employment Status (Please Circle): Part-Time Full-Time **Hours per pay period** _____

Gross monthly income (before taxes): \$ _____

Are you paid (please circle) hourly or salary **Is this amount paid** (please mark) ___weekly ___every two weeks ___twice a month ___monthly

Previous Employer: _____ **Work Phone:** (____) _____ - _____

Title Length of Employment _____ (years, months)

Street City State Zip Code
Employment Status (Please Circle): Part-Time Full-Time

Continue listing previous employers on a separate sheet of paper

Secondary Employer: _____ Work Phone: (____) _____ - _____

 Title Hire Date

 Street City State Zip Code

Employment Status (Please Circle): Part-Time Full-Time Hours per pay period _____

Are you paid (please circle) hourly or salary

Are you paid (please mark) _____ weekly _____ every two weeks _____ twice a month _____ monthly

CO-APPLICANT INFORMATION

Name: _____
 First MI Last

 Street

 City State Zip Code

Phone: (____) _____ - _____ Email: _____

Ethnicity (please circle): Hispanic/Latino Non-Hispanic/Latino

Race (please circle): American Indian or Alaska Native Asian Black or African American
 Native Hawaiian or Other Pacific Islander White Other 2 or more races

Citizenship (please select one):

- You are a Citizen or National of the United States
 You are foreign born and a U.S. Resident (green card holder)
 You are a Noncitizen with eligible status as evidenced by one of the documents listed below
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5. None of the above – Not contending eligible immigration status, no further information required and the person named above understands they are not eligible for program selection but agrees to start housing counseling while immigration status changes.

Marital Status (please circle): Single Married Divorced Separated Widowed

Gender (please circle): Male Female Other

Disabled? Yes No Veteran? Yes No

Education (please circle one):

Below High School Diploma High School Diploma or Equivalent
 Two-Year College Bachelor's Degree
 Master's Degree Above Master's Degree

Relationship to Customer (please circle): Spouse/Partner Daughter/Son Sister/Brother Girlfriend/Boyfriend
 Mother/Father Other: _____

CO-APPLICANT EMPLOYMENT — Last 2 Years*Please Print Clearly*

Primary Employer: _____ **Work Phone:** (____) _____ - _____

 Title Hire Date

 Work Address Street City State Zip Code

Employment Status (Please Circle): Part-Time / Full-Time **Hours per pay period:** _____

Gross monthly Income (before taxes): \$ _____ **Are you paid** (please circle) hourly or salary

Is this amount paid (please mark) ___ weekly ___ every two weeks ___ twice a month ___ monthly

Previous Employer: _____ **Work Phone:** (____) _____ - _____

 Title Length of Employment _____ (years, months)

 Street City State Zip Code

Continue listing previous employers on a separate sheet of paper.

Employment Status (Please Circle): Part-Time Full-Time

Secondary Employer: _____ **Work Phone:** (____) _____ - _____

 Title Hire Date

 Street City State Zip Code

Employment Status (Please Circle): Part-Time Full-Time **Hours per pay period** _____

Are you paid (please circle) hourly or salary

Are you paid (please mark) ___ weekly ___ every two weeks ___ twice a month ___ monthly

HOUSEHOLD INCOME*Please Print Clearly*

Estimated Gross Annual Family or Household Income: \$ _____ (include income from all adults – 18 and older – living in the household)

Type of Income (List ALL sources of income)	BUYER Monthly Amount	CO-APPLICANT(S) Monthly Amount	Other Adult in Household Monthly Amount
Salary, Wages (including Tips)			
Alimony/Child Support (children 16 and younger only)			
Rental Income			
Social Security SSI / SSDI (children 16 and younger and/or permanent disability only)			
Pension/ Retirement Income			
Public Assistance			
Self-employment Income			
Dependent SSI Income (children 16 and younger and/or permanent disability only)			
Other Employment (if employed for 2+ years)			

LIQUID FUNDS/SAVINGS/INVESTMENTS*Please Print Clearly*

<i>Please list the approximate value of the following:</i>	BUYER	CO-APPLICANT(s)	Other Adult in Household
Checking account			
Savings account			
Checking account			
Cash			
CDs			
Securities (stocks, bonds, etc.)			
Retirement account			
Other Liquid Funds			

HOUSING EXPENSES

	BUYER	CO-APPLICANT(s)	Other Adult in Household
Current monthly rent			
Utilities: Electric/Gas/Solid Waste			
Telephone / Cell phone			
Cable/Satellite TV			
Internet			
Other Living Expenses (ie.Storage)			

LIABILITIES / DEBT**AUTHORIZATION TO RELEASE CREDIT INFORMATION**

I authorize the Housing Counseling Staff of Bend-Redmond Habitat for Humanity to:

- (a) pull my/our credit report (soft pull; will not affect your score) to review my/our credit file for housing counseling in connection with my pursuit on a loan to purchase real property;
- (b) pull my/our credit report (soft pull) and review my/our credit file for informational inquiry purposes; and
- (c) obtain a copy of the HUD-1 Settlement Statement, Appraisal, and Real Estate Note(s) when I/We purchase a home, from the lender who made me/us a loan and/or the title company that closed the loan.

I/We understand that any intentional or negligent representation(s) of the information contained on this form may result in civil liability and/or criminal liability under the provisions of Title 18, United States Code, Section 1001.

Customer

Date

Co-Applicant

Date

Most convenient time for an individual appointment? (Please Mark) ____ AM ____ PM

Please complete the financial questionnaire on the following page.



Please put an "x" in the column that best fits your current situation. As hard as it can sometimes be to think about money concerns, this will give us an idea of how to best set goals together when we meet to review your mortgage readiness.

How often does this happen to you?	Often	Sometimes	Never
1. Not enough money for essentials			
2. Behind on rent payments			
3. Don't have enough food until there is more money			
4. Are in danger of having utilities turned off			
5. Unable to meet large bills			
6. Bills are confusing			
7. Excessive medical bills			
8. Behind in credit card payments			
9. Have had action taken by creditor			
10. Struggle to discuss finances with family or partner			
11. Bills get lost or mailed/paid late			
12. Feel stressed about finances			
13. Don't know where money is going			
14. Not able to save 10% of income (each month)			
Other	Yes	No	
Change in job			
Recently divorced or separated			
Struggle with some type of addiction			
Other:			
Other:			

What three things do you think are most important to pay first and regularly each month?

- 1.
- 2.
- 3.

What financial concern do you want to work on most?

Steps in the Bend-Redmond Habitat Partnership Program:

Step 1: Watch the Informational Video

Step 2: Submit a Customer Intake form, 3 most recent paystubs and attend a follow-up appointment with Habitat (staff will schedule a meeting with you shortly after you have completed the soft pull credit)

Step 3: Attend an in-person Information Session if Invited.

Step 4: Continue meeting, if necessary, and working on mortgage readiness goals

Step 5: Submit an application for the partnership program during an open application period (dates will be announced)

Step 6: If selected to the partnership program, complete requirements

Step 7: Submit a loan application and if approved,

Step 8: Successfully complete the program requirements, apply for a home loan, and ***purchase your home!***

Thank you for your interest in Habitat for Humanity's partnership towards homeownership!