



Customer Intake Form

Customer Please Print Clearly

Name: First MI Last
Street
City State Zip Code
Home: () - Work: () - Email:
Fax: () - Mobile/Cell: () - Date of Birth

Race (Please Circle):
1 . Black 2 . Black or African American 3 . American Indian/Alaskan Native
4 . Asian 5 . Native Hawaiian/Other Pacific Islander
6 . American Indian/Alaskan Native and White 7 . Asian and White 8 . Black or African American and White
9 . American Indian/Alaskan Native and Black 10 . Asian and White

HouseHold Income Size - Circle One 1 2 3 4 5 6 7 8 9 10

Circle One
A. Upto \$25000 B. \$25000 - \$42000 C. \$42000 - \$62000 D. Over \$62000
Ethnicity (Please Select "Yes" or "No" for Hispanic Origin. You should select both a "Race" category and a "yes" or "no" for Hispanic Origin:)
Hispanic: Yes No
Marital Status (Please Circle): 1. Single 2. Married 3. Divorced 4. Seperated 5. Widowed
Gender (Please Circle): Male Female
Current Housing Arrangement (Please Circle):
1 . Rent 2 . Homeless
3 . Home owner with mortgage 4 . Living with family member and not paying rent
5 . Home owner with mortgage paid off
Are you a first time buyer (you do not currently own a home or have not owned a home in the past three years)?
Yes No
Household Type (Please select the most accurate)?
1 . Female Headed single parent household 2 . Female Headed single parent household 3 . Single Adult
4 . Two or more unrelated adults 5 . Married with Children 6 . Married without Children 7 . Other
Do you have a contract on house at this time? Yes No
Are you currently working as a real estate agent? Yes No Name

Agent Name/Phone#
Are you a Veteran? Yes No
Referred to by (Please Circle all that apply):
Internet Print advertisement Bank Government TV Realtor
Staff/Board Member Walk In Friend Radio Newspaper Article
Do you have a pre-approval from a lender? Yes No Which One?
Have you owned a Home in the last (3) years? Yes No

Authorization

I authorize the Housing Counseling Agency to:
(a) I understand that I am under no obligation to use any or lite presenters at this workshop, Initials
(b) Obtain a copy of the HUD-1 Settlement Statement, or Closing Disclosure when I purchase a home, from the lender who made me/us a loan and/or the title company that closed the loan.
(C) I Understand that workshop is free of charge
I/We understand that any Intentional or negligent representation(s) of the information contained on this form may result in civil liability under the provision of Title 18. United State Code, Section 1001.
Customer Date