

# INTAKE SHEET-First time Home Buyers

Date: \_\_\_\_\_ E-Mail address \_\_\_\_\_@\_\_\_\_\_

Applicant's Name: \_\_\_\_\_ SEX: M [ ] F [ ]

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

How long have you lived at this address? \_\_\_\_\_ years and \_\_\_\_\_ months

Phone: (Home) \_\_\_\_\_ (Work) \_\_\_\_\_ (Cell) \_\_\_\_\_

Best Time to Call \_\_\_\_\_ am \_\_\_\_\_ pm Where: Home \_\_\_\_\_ Work \_\_\_\_\_ Cell \_\_\_\_\_

Applicant's S.S. No: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Marital Status: M \_\_\_ S \_\_\_ D \_\_\_ W \_\_\_  
(Last 4-digits only)

If single head of household, do you support at least one child? Yes \_\_\_\_\_ No \_\_\_\_\_ No children \_\_\_\_\_  
Household Size \_\_\_\_\_

Co-Applicant's Name: \_\_\_\_\_ M [ ] F [ ]

Co-Applicant's S.S. No: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Marital Status: M \_\_\_ S \_\_\_ D \_\_\_ W \_\_\_  
(Last 4-digits only)

How did you find out about this workshop? Agency \_\_\_\_\_ Realtor \_\_\_\_\_ Friend \_\_\_\_\_ Internet \_\_\_\_\_  
Newspaper \_\_\_\_\_ Radio \_\_\_\_\_ Other \_\_\_\_\_

Have you owned a home within the last 36 months (3 years) Yes \_\_\_\_\_ No \_\_\_\_\_

## ***The following information is required exclusively for statistical purposes:***

<u>Applicant</u>			<u>Co-Applicant</u>		
<b>Race</b>			<b>Race</b>		
White [ ]	Black/Afr.Amer [ ]	America/Indian [ ]	White [ ]	Black/Afr.Amer.[ ]	America/Indian [ ]
Asian [ ]	Other [ ]	Native Pacific Islander [ ]	Asian [ ]	Other [ ]	Native Pacific Islander [ ]
<b>Ethnicity</b>	Hispanic [ ]	Non Hispanic [ ]	<b>Ethnicity</b>	Hispanic [ ]	Non Hispanic [ ]
<b>Education</b>	No High School Diploma ___	GED Diploma ___	Vocational Certificate ___	Some college ___	
	Associates Degree ___	Bachelors ___	Masters ___	Doctoral ___	

Are you currently working? Yes \_\_\_ No \_\_\_ Is Co-Applicant currently working? Yes \_\_\_ No \_\_\_

### Applicant Income

Hourly Rate: \_\_\_\_\_  
No. Hrs. per week: \_\_\_\_\_  
Gross Monthly \_\_\_\_\_

### Co-Applicant Income

Hourly Rate: \_\_\_\_\_  
No. Hrs. per week \_\_\_\_\_  
Gross Monthly \_\_\_\_\_

Are you working with a Lender? \_\_\_\_\_ Yes \_\_\_ No \_\_\_  
Are you working with a Realtor? \_\_\_\_\_ Yes \_\_\_ No \_\_\_  
Are you working with a Counseling Agency? \_\_\_\_\_ Yes \_\_\_ No \_\_\_  
Are you working with the Loss mitigation department? \_\_\_\_\_ Yes \_\_\_ No \_\_\_  
In how many months are you ready to buy your home? \_\_\_ months Do you need additional help? \_\_\_\_\_

## HEA CLASS RULES AND ACKNOWLEDGEMENT

Thank you for attending the Housing and Education Alliance, Inc. Home Ownership Education Class. In this workshop you will find all the up to date information you will need to understand the process of purchasing and retaining your new home. You must sign below that you understand the class rules.

Below are the class rules to insure that you and your fellow students derive the most benefit from the class and that everyone is aware of what is required as classroom etiquette.

1. You must be present and in your seat 15 minutes prior to the start of class. Arrival greater than 15 minutes after class begins and you may not be allowed to enter.
2. You must leave the premises no later than 15 minutes after class completion. If you have further questions for the instructor please write them down giving them to the instructor who will in turn respond with an answer and or submit them by email and you will receive your answer.
3. You are responsible signing the attendance sheet, please be aware your instructor is not responsible for verifying your attendance. **If you fail to sign and are not accounted for, a certificate will not be issued. Please complete the intake sheet in its entirety.**
4. Please make sure all cell phones are turned either off or are set to silent/vibrate prior to class beginning.
5. Food or drinks may or may not be allowed based on venue please ask before class as this may change due to location. In all cases you are encouraged to bring you lunch.
6. **Children are not allowed in class there are no child care services provided.**
7. You are responsible to bring paper pencil or other materials for class to take notes.
8. If you are unable attend class please call 813-932-4663 to either cancel or reschedule.
9. Reading books, magazines, play8ing games, cross word puzzles etc. will not be tolerated. **All students are expected to pay full attention to class material.**
10. Although Real Estate and Mortgage Professionals are permitted to attend class the passing out of business cards, literature or otherwise soliciting for business will not be tolerated and if observed YOU will be escorted from the class.
11. As talking between individuals and groups can be very disruptive to the class it is discouraged. If you have something important please express if for the benefit of the group.
12. Sleeping in class will not be allowed; if you are found to be sleeping you will be counted as absent.

Please sign below as an acknowledgement of your understanding and acceptance of our class rules.

\_\_\_\_\_  
Student Signature:

Print Name: \_\_\_\_\_

Date: \_\_\_\_\_