



It's a Pleasure to Meet You!

Data Intake

Today's Date:

HOMEBUYER INFORMATION (Primary Borrower)

BORROWER'S FIRST NAME:	MIDDLE INITIAL:	LAST NAME:
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CO-BORROWER FIRST NAME:	MIDDLE INITIAL:	LAST NAME:
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CURRENT ADDRESS:	ZIP CODE:	HOW LONG AT CURRENT ADDRESS?
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HOME PHONE:	WORK PHONE:	CELL PHONE:	FAX:
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E-MAIL:	CITIZENSHIP: <input type="checkbox"/> AMERICAN <input type="checkbox"/> OTHER _____	ARE YOU HEAD OF HOUSEHOLD: <input type="checkbox"/> Yes <input type="checkbox"/> No
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GENDER: <input type="checkbox"/> Male <input type="checkbox"/> Female	HOUSEHOLD SIZE (INCLUDING YOU):	ANNUAL INCOME:
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<p>How did you hear about HomeFree-USA?</p> <p>Website: _____</p> <p>Name: _____</p> <p>Email: _____</p> <p>Phone: _____</p> <p>Company/Agency Name:</p>	<p>MARITAL STATUS: <input type="checkbox"/> Single <input type="checkbox"/> Married</p> <p>ARE YOU PROFICIENT IN ENGLISH: <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>ACTIVE MILITARY? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>VETERAN? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>Are you currently working with a realtor? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If yes, please provide:</p> <p>Realtor's Name: _____</p> <p>Company Name: _____</p> <p>Phone Number: _____</p> <p>Email Address: _____</p>
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<p>ARE YOU A: <input type="checkbox"/> First-Time Homebuyer</p> <p>DO YOU CURRENTLY: <input type="checkbox"/> Rent <input type="checkbox"/> Own a home <input type="checkbox"/> Both <input type="checkbox"/> Neither</p> <p>EDUCATION: <input type="checkbox"/> High School/GED <input type="checkbox"/> College <input type="checkbox"/> Graduate School <input type="checkbox"/> Other _____</p>	<p>RACE: <input type="checkbox"/> Black Non-Hispanic <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Asian <input type="checkbox"/> White Non-Hispanic <input type="checkbox"/> Hispanic <input type="checkbox"/> Multiracial Hispanic <input type="checkbox"/> Multiracial Non-Hispanic <input type="checkbox"/> Native Hawaiian/Islander Pacific <input type="checkbox"/> Other _____ <input type="checkbox"/> Choose Not To Respond</p>	<p>Are you currently working with a lender? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If yes, please provide:</p> <p>Loan Officer's Name: _____</p> <p>Company Name: _____</p> <p>Phone Number: _____</p> <p>Email Address: _____</p>
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IMPORTANT NOTICE:

HomeFree-USA charges a nominal fee to cover costs associated with housing counseling and education services. Additionally, while working with HomeFree-USA, we may introduce you to business associates that come highly recommended however you are not obligated to utilize their services. **Please initial to confirm understanding:** _____



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Data Intake

Today's Date:

HOMEBUYER INFORMATION (Co-Borrower)

CO-BORROWER'S FIRST NAME:			MIDDLE INITIAL:			LAST NAME:		
CURRENT ADDRESS:					ZIP CODE:		HOW LONG AT CURRENT ADDRESS?	
HOME PHONE:		WORK PHONE:		CELL PHONE:		FAX:		
E-MAIL:				CITIZENSHIP: <input type="checkbox"/> AMERICAN <input type="checkbox"/> OTHER _____		ARE YOU HEAD OF HOUSEHOLD: <input type="checkbox"/> Yes <input type="checkbox"/> No		
GENDER: <input type="checkbox"/> Male <input type="checkbox"/> Female				HOUSEHOLD SIZE (INCLUDING YOU):		ANNUAL INCOME:		
How did you hear about HomeFree-USA? Website: _____ Name: _____ Email: _____ Phone: _____ Company/Agency Name: _____			MARITAL STATUS: <input type="checkbox"/> Single <input type="checkbox"/> Married ARE YOU PROFICIENT IN ENGLISH: <input type="checkbox"/> Yes <input type="checkbox"/> No ACTIVE MILITARY? <input type="checkbox"/> Yes <input type="checkbox"/> No VETERAN? <input type="checkbox"/> Yes <input type="checkbox"/> No			Are you currently working with a realtor? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please provide: Realtor's Name: _____ Company Name: _____ Phone Number: _____ Email Address: _____		
ARE YOU A: <input type="checkbox"/> First-Time Homebuyer DO YOU CURRENTLY: <input type="checkbox"/> Rent <input type="checkbox"/> Own a home <input type="checkbox"/> Both <input type="checkbox"/> Neither EDUCATION: <input type="checkbox"/> High School/GED <input type="checkbox"/> College <input type="checkbox"/> Graduate School <input type="checkbox"/> Other _____			RACE: <input type="checkbox"/> Black Non-Hispanic <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Asian <input type="checkbox"/> White Non-Hispanic <input type="checkbox"/> Hispanic <input type="checkbox"/> Multiracial Hispanic <input type="checkbox"/> Multiracial Non-Hispanic <input type="checkbox"/> Native Hawaiian/Islander Pacific <input type="checkbox"/> Other _____ <input type="checkbox"/> Choose Not To Respond			Are you currently working with a lender? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please provide: Loan Officer's Name: _____ Company Name: _____ Phone Number: _____ Email Address: _____		

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FOR OFFICE USE ONLY

Membership Type: Gold Bronze Reactivation Lead/Not a Member
 Amount Paid: _____ Payment Type: Cash Check Credit/Debt