



## HBED Intake

### A. Client Information

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Last Name	First Name	Middle Initial
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Street Address	City, State & Zip
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Best Phone Number(s) to Reach You	Email Address
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Currently Renting

How long at this address? \_\_\_\_\_

Own My Home

How many in the household? \_\_\_\_\_

How many dependents? \_\_\_\_\_

If mailing address is different than address listed above, please list here:

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Street Address	City, State, Zip
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### Co-Client Information

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Last Name	First Name	Middle Initial
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Street Address (If different from above)	City, State Zip
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Best Phone Number(s) to Reach You	Email Address
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Currently Renting

How long at this address? \_\_\_\_\_

Own My Home

How many in the household? \_\_\_\_\_

How many dependents? \_\_\_\_\_

If mailing address is different from address listed above, please list here:

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Street Address	City, State, Zip
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## B. Demographic Information

**Client** Gender: \_\_\_ Female \_\_\_ Male

Client Date of Birth: \_\_\_\_\_

### Race/ Ethnicity

- \_\_\_ African American  
\_\_\_ Caucasian  
\_\_\_ Asian American/ Pacific Islander  
\_\_\_ Hispanic  
\_\_\_ Native American

### Marital Status

- \_\_\_ Single, never married  
\_\_\_ Divorced  
\_\_\_ Married  
\_\_\_ Separated  
\_\_\_ Widowed

### Employment Status

- \_\_\_ Full Time  
\_\_\_ Part time  
\_\_\_ Student

### Highest Level of Education Completed

- \_\_\_ Less Than 12 Years  
\_\_\_ High School Diploma/ GED  
\_\_\_ Some College  
\_\_\_ AA Degree/ Two Year  
\_\_\_ Bachelor's Degree/Four Year  
\_\_\_ Graduate Degree

### Check All That Apply:

- \_\_\_ First Time Home Buyer  
\_\_\_ Single, Head of Household  
\_\_\_ Female Head of Household  
\_\_\_ US Veteran  
\_\_\_ Owned a home in the last 3 years

**Co-Client** Gender: \_\_\_ Female \_\_\_ Male

Co-Client Date of Birth: \_\_\_\_\_

### Race/ Ethnicity

- \_\_\_ African American  
\_\_\_ Caucasian  
\_\_\_ Asian American/ Pacific Islander  
\_\_\_ Hispanic  
\_\_\_ Native American

### Marital Status

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### Check All That Apply:

- \_\_\_ First Time Home Buyer  
\_\_\_ Single, Head of Household  
\_\_\_ Female Head of Household  
\_\_\_ US Veteran  
\_\_\_ Owned a home in the last 3 years

### C. Income Info

Employer: \_\_\_\_\_

Pay Schedule:

Gross pay amount: \$ \_\_\_\_\_

Weekly\_\_\_\_ Bi-weekly\_\_\_\_  
Twice a month\_\_\_\_ Monthly\_\_\_\_

Other income you may receive:

2<sup>nd</sup> Job\_\_\_\_ Alimony\_\_\_\_ Child Support\_\_\_\_ SSI/SSDI\_\_\_\_ SNAP(food stamps)\_\_\_\_ Other\_\_\_\_

Gross pay amount: \$ \_\_\_\_\_

### Co-Client Income

Employer: \_\_\_\_\_

Pay Schedule:

Gross pay amount: \$ \_\_\_\_\_

Weekly\_\_\_\_ Bi-weekly\_\_\_\_  
Twice a month\_\_\_\_ Monthly\_\_\_\_

Other income you may receive:

2<sup>nd</sup> Job\_\_\_\_ Alimony\_\_\_\_ Child Support\_\_\_\_ SSI/SSDI\_\_\_\_ SNAP(food stamps)\_\_\_\_ Other\_\_\_\_

Gross pay amount: \$ \_\_\_\_\_

### Lender & Closing Info

Who is your lender? \_\_\_\_\_

When is your closing date? \_\_\_\_\_ Sales Price? \_\_\_\_\_

How did you learn about New Level CDC? \_\_\_\_\_

### Disclosure

New Level CDC provides Housing Counseling and Homebuyer Education. We also offer financial education, credit & budget counseling & coaching, mortgage loan information sessions, a matching savings program, & help finding affordable housing. As our client, you are not obligated to receive, purchase, or utilize any services offered by New Level CDC or our partners in order to receive housing counseling services.

Upon using New Level CDC home buyer education services **and** at the time I make a home purchase, New Level CDC will send a statement of invoice to my lender for the amount of \$225.00. This amount will be reflected on the final loan closing documents and is due and payable upon closing the loan.

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date