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|                             |                      |
|-----------------------------|----------------------|
| <b>FOR OFFICE USE ONLY</b>  |                      |
| Staff initials: _____       | Date received: _____ |
| Pay type: _____             | Date received: _____ |
| CMAX ID: _____              | HC sheet ID: _____   |
| Class signing up for: _____ |                      |

## First Time Homebuyer Education Class Intake

| Participant One   | Participant Two   |
|---|---|
| Name:   | Name:   |
| Address:  | Address:  |
| City:   | City:   |
| State/Zip:  | State/Zip:  |
| Phone (daytime):  | Phone (daytime):  |
| Phone (evening):  | Phone (evening):  |
| Email:  | Email:  |
| Date of Birth:  | Date of Birth:  |
| Gender <input type="checkbox"/> Male <input type="checkbox"/> Female<br>Veteran? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>Disabled? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>Female head of household? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>Foreign Born? <input type="checkbox"/> Yes <input type="checkbox"/> No   | Gender <input type="checkbox"/> Male <input type="checkbox"/> Female<br>Veteran? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>Disabled? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>Female head of household? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>Foreign Born? <input type="checkbox"/> Yes <input type="checkbox"/> No   |
| Race:<br><input type="checkbox"/> American Indian or Alaskan Native<br><input type="checkbox"/> American Indian/Alaskan Native & Black/African American<br><input type="checkbox"/> American Indian/Alaskan Native & White<br><input type="checkbox"/> Asian<br><input type="checkbox"/> Asian & White<br><input type="checkbox"/> Black/African American<br><input type="checkbox"/> Black/African American & White<br><input type="checkbox"/> Native Hawaiian or Other Pacific Islander<br><input type="checkbox"/> White<br><input type="checkbox"/> Multi Racial<br><input type="checkbox"/> Hispanic (circle one)<br><input type="checkbox"/> Hispanic (circle one)<br>Puerto Rican / Cuban / Mexicano / Chicano<br>Other Hispanic Latino | Race:<br><input type="checkbox"/> American Indian or Alaskan Native<br><input type="checkbox"/> American Indian/Alaskan Native & Black/African American<br><input type="checkbox"/> American Indian/Alaskan Native & White<br><input type="checkbox"/> Asian<br><input type="checkbox"/> Asian & White<br><input type="checkbox"/> Black/African American<br><input type="checkbox"/> Black/African American & White<br><input type="checkbox"/> Native Hawaiian or Other Pacific Islander<br><input type="checkbox"/> White<br><input type="checkbox"/> Multi Racial<br><input type="checkbox"/> Hispanic (circle one)<br><input type="checkbox"/> Hispanic (circle one)<br>Puerto Rican / Cuban / Mexicano / Chicano<br>Other Hispanic Latino |

| Participant One  | Participant Two  |
|--|--|
| Education: <input type="checkbox"/> Below H. S. Diploma <input type="checkbox"/> 2 Yr College<br><input type="checkbox"/> H.S. Diploma or G.E.D. <input type="checkbox"/> Bachelors Degree<br><input type="checkbox"/> Graduate Degree | Education: <input type="checkbox"/> Below H. S. Diploma <input type="checkbox"/> 2 Yr College<br><input type="checkbox"/> H.S. Diploma or G.E.D. <input type="checkbox"/> Bachelors Degree<br><input type="checkbox"/> Graduate Degree |
| Have you seen a copy of your credit report in the last year?<br><input type="checkbox"/> Yes <input type="checkbox"/> No   | Have you seen a copy of your credit report in the last year?<br><input type="checkbox"/> Yes <input type="checkbox"/> No   |
| Do you know your credit score?<br><input type="checkbox"/> Yes <input type="checkbox"/> No   | Do you know your credit score?<br><input type="checkbox"/> Yes <input type="checkbox"/> No   |

**Household Information**

Household size:  
 Number of adults: \_\_\_\_\_  
 Number of children under 6 years of age: \_\_\_\_\_  
 Number of children between 6 and 18 years of age: \_\_\_\_\_

Household Type:

Single Adult  Married without children  
 Female-Headed Single Parent  Married with children  
 Male-Headed Single Parent  Two or more unrelated adults

Annual household income:

|   |  |
|---|--|
| <input type="checkbox"/> \$20,000 and below   | <input type="checkbox"/> \$60,000 to \$70,000  |
| <input type="checkbox"/> \$20,000 to \$30,000 | <input type="checkbox"/> \$70,000 to \$80,000  |
| <input type="checkbox"/> \$30,000 to \$40,000 | <input type="checkbox"/> \$80,000 to \$90,000  |
| <input type="checkbox"/> \$40,000 to \$50,000 | <input type="checkbox"/> \$90,000 to \$100,000 |
| <input type="checkbox"/> \$50,000 to \$60,000 | <input type="checkbox"/> \$100,000 or more     |

Savings / Investments:

| Type of Account | Name of Bank | Approximate Balance |
|-----------------|--------------|---------------------|
| Checking        |              |                     |
| Savings         |              |                     |
| Retirement      |              |                     |
| CD/Stocks/Bonds |              |                     |
| Other           |              |                     |

Residence Type:

What type of residence do you currently live in?  Single Family  Two Family Unit  Three Family Unit  
 Condo/Townhouse  Mobile Home  Four or more Family Unit

What type are you planning to buy?  Single Family  Two Family Unit  Three Family Unit  
 Condo/Townhouse  Mobile Home  Four or more Family Unit

Referral Source:

|  |   |                                       |
|--|---|---------------------------------------|
| <input type="checkbox"/> Lender        | <input type="checkbox"/> Realtor        | <input type="checkbox"/> State Agency |
| <input type="checkbox"/> Media         | <input type="checkbox"/> Another Client | <input type="checkbox"/> Walk-In      |
| <input type="checkbox"/> NeighborWorks | <input type="checkbox"/> Word of Mouth  | <input type="checkbox"/> Other: _____ |

Where are you in the home buying process? *(please select all that apply)*

- No idea where to begin  Plan to purchase a house in 3-5 years
- Plan to purchase a house within 2 years
- Plan to purchase soon / Actively looking to buy a house now *(Please answer questions below)*

Are you currently working with a real-estate agent?  Yes  No If yes, with whom? \_\_\_\_\_

Are you approved with a lender?  Yes  No If yes, with whom? \_\_\_\_\_

Type of Loan Program:  MassHousing  One Mortgage  FHA  USDA  VA  Other: \_\_\_\_\_

Interest Rate: \_\_\_\_\_%

Have you made an offer or signed a P&S agreement?  Yes  No If yes, what is the property address?  
\_\_\_\_\_

Do you have a closing date yet?  Yes  No If yes, when? \_\_\_\_\_

Are you purchasing a short sale property?  Yes  No

Are you purchasing a bank owned property?  Yes  No

**Home Inspection (check one)**

\_\_\_\_ I/We choose to have a home inspection performed. \_\_\_\_\_ I/We choose **not** to have a home inspection performed.

## THANK YOU FOR COMPLETING THIS FORM

I/We authorize NewVue Communities to:

- Obtain a copy of the Property Appraisal, Purchase and Sales Agreement, HUD-1 Settlement Statement, Final Truth-in-Lending Disclosure or any other closing documents necessary when I purchase a home from the lender who made me a loan or the title company/attorney that closed the loan and to share any information in this application for reporting purposes only.
- I/We understand that a photocopy of this authorization is as valid as the original.

Participant One Signature \_\_\_\_\_ Date \_\_\_\_\_

Participant Two Signature \_\_\_\_\_ Date \_\_\_\_\_

Is it okay to use your comments or photo in print or on our website?  Yes  No

If yes, may we use your name?  Yes  No

I/We would like to schedule an individual appointment with the Housing Counselor to review my/our credit report and to further discuss my/our options?  Yes  No

**Yes / No** Pull my credit report to review my credit for housing counseling in connection with my pursuit on a loan to purchase real property; and pull my credit report and review my credit file for informational inquiry purposes.  
*If you circled yes to the question above you must submit the credit report fee along with your social security numbers below.*

Participant One SS#: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Participant Two SS#: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_