

Universal Intake Form

PLEASE PRINT

How were you referred to us? _____ If previous client, Counselor's Name: _____

Borrower:

Name: _____
First M.I. Last

Social Security # Date of Birth Race Ethnicity (Hispanic/Non-Hispanic)

Address: _____
Street Address City State Zip

Home Phone: _____ Cell Phone: _____

Employer: _____ Annual Income: Gross \$ _____

Other Income? * Please identify source and amount. _____

***Alimony, child support, or separate maintenance income need not be revealed if the Borrower or Co-Borrower does not choose to have it considered for repaying this loan.**

Work Phone: _____ Email Address: _____

Marital Status: Married Separated Unmarried (single, divorced, widowed) # of People in Household? _____

Co - Borrower:

Name: _____
First M.I. Last

Social Security # Date of Birth Race Ethnicity (Hispanic/Non-Hispanic)

Address: _____
Street Address City State Zip

Home Phone: _____ Cell Phone: _____

Employer: _____ Annual Income: Gross \$ _____

Other Income?* Please identify source and amount. _____

Work Phone: _____ Email Address: _____

Marital Status: Married Separated Unmarried (single, divorced, widowed)

***Alimony, child support, or separate maintenance income need not be revealed if the Borrower or Co-Borrower does not choose to have it considered for repaying this loan.**

Do You Want to Keep Your Home? _____ Are you currently living in the home? _____

Name of Original Mortgage Company: _____

Name of Current Mortgage Company: _____

Have You Contacted Your Lender/Servicer? Yes _____ No _____ If Yes, Last Contact Date: _____

Home Mortgage Loan Information:

Loan Number: _____ Current Value of Your Home: _____

Type of Mortgage: _____ FHA _____ VA _____ Conv. _____ ARM _____ 80/20 _____ 30 -Yr Fixed _____

Other Identify: _____

Monthly Mortgage Payment: _____ Term: _____ Interest Rate: _____

Date Last Mortgage Payment Made: _____ How Many Months Past Due Are You? _____

Have You Been Served Legal Papers? _____ Do You Have a Second Mortgage? _____

If Yes, With Whom?: _____

Ever Had a Loan Modification / Forbearance Agreement? _____ When? _____

Have You Filed Bankruptcy? _____ When? _____

Have You Ever Worked with Another Agency to Remedy Your Mortgage Default? _____

If Yes, Agency's Name: _____ Counselor: _____ Payments to Agency (if any): \$ _____

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Monthly Income: Borrower:		Monthly Income: Co-Borrower	
Wages (<i>before taxes</i>)	\$ _____	Wages (<i>before taxes</i>)	\$ _____
Unemployment Income	\$ _____	Unemployment Income	\$ _____
Child Support/Alimony*	\$ _____	Child Support/Alimony*	\$ _____
SSI/SSDI	\$ _____	SSI/SSDI	\$ _____
Retirement/Pension	\$ _____	Retirement/Pension	\$ _____
Rents received	\$ _____	Rents received	\$ _____
Other	\$ _____	Other	\$ _____
Gross Monthly Income: \$ _____		Gross Monthly Income: \$ _____	
Net Monthly Income**: \$ _____		Net Monthly Income**: \$ _____	

*Alimony, child support, or separate maintenance income need not be revealed if the Borrower or Co-Borrower does not choose to have it considered for repaying this loan.

**Gross income, less Federal/State/Local taxes, FICA, 401K deductions, etc.

Besides income sources, please circle additional resources available to pay towards defaulted mortgage:

401(k), 403(b), CDs, IRAs, Money Market, Family/Friends, Other Amount available: \$ _____

	Monthly	Annual	Total Owed
Total Mortgage Payment			
(Principal & Int., Property Taxes, H/O Insurances, H/O Ass'n Dues)	\$ _____	\$ _____	
If not escrowed, Property Taxes	\$ _____	\$ _____	
If not escrowed, H/O Insurance	\$ _____	\$ _____	
If not escrowed, Homeowner Associations Dues -	\$ _____	\$ _____	
Auto Expenses (gas, maintenance, etc.)	\$ _____	\$ _____	
Auto Insurance:	\$ _____	\$ _____	
Credit Cards	\$ _____	\$ _____	
Child Care, Alimony, Child Support:	\$ _____	\$ _____	
Food (Groceries, Eating Out, Snacks):	\$ _____	\$ _____	
Utilities (gas, electric, water, sewer, and garbage)	\$ _____	\$ _____	
Communications (cell phone, telephone, internet)	\$ _____	\$ _____	
Miscellaneous Spending Money:	\$ _____	\$ _____	
Auto Loans: Year _____ Make & Model _____	\$ _____	\$ _____	\$ _____
Auto Loans: Year _____ Make & Model _____	\$ _____	\$ _____	\$ _____
Installment Loans:	\$ _____	\$ _____	\$ _____
Medical Expenses:	\$ _____	\$ _____	\$ _____
Student Loans:	\$ _____	\$ _____	\$ _____
Home Equity Loans, outstanding balances	\$ _____	\$ _____	\$ _____
TOTAL MONTHLY EXPENSES:	\$ _____		
MONTHLY SURPLUS/SHORTFALL (Total Monthly Income minus Total Monthly Expenses)			\$ _____

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1. I/we represent that I am/we are currently occupying the property securing the loan as my/our primary residence. If I am /we are currently occupying the property, I/we also represent that I/we intend to continue occupying the property as my/our primary residence.
2. Under penalty of perjury, I/we certify that all documents and information that I/we provide to the Housing Counselor and the Lender/Servicer, including the documents and information regarding my eligibility for any modification or eligibility for any Foreclosure Mediation Program, are true and correct and accurately reflect my financial status. My Lender/Servicer may discuss, obtain and share information about my mortgage and financial situation with third parties regarding a possible alternative to foreclosure.
3. I/we understand and acknowledge the Lender/Servicer may investigate the accuracy of my/our statements, may require me/us to provide supporting documentation, and that knowingly submitting false information may violate state and Federal law.
4. I/we understand that if I/we have intentionally engaged in fraud or misrepresented any fact(s), or if I/we do not provide all of the required documentation, the Lender/Servicer may refuse to consider any modification or alternative to foreclosure.
5. I/we certify that I am /we are willing to provide all requested documents and to respond to Housing Counselor/Mediator/Lender/Servicer communications in a timely manner. I/we understand that time is of the essence and intentional delays on my/our part could result in making me/us ineligible for the Foreclosure Mediation Program.
6. I/we understand that negotiations for a possible foreclosure alternative will not constitute a waiver or defense to my Lender's/Servicer's right to commence or continue any foreclosure or other collection action.
7. I/we understand that an alternative to foreclosure will only be provided if an agreement has been approved in writing by my Lender/Servicer.

Borrower

Date

Co-Borrower

Date