



Demographics

Client Information

Name: _____

Birth date _____ SSN/ITIN _____

Gender: M _____ F _____ T _____

Relationship status	Tax Filing Status
Single	Single
Married	Married filing jointly
Legally separated	Married filing separately
Divorced	Head of Household
Widowed	Qualifying widow (er) with dependent child
Other	Never filed

Language

English _____ Spanish _____ Other _____

Race

Caucasian _____ African/American _____ Asian _____

Other _____

Ethnicity Latino/Latina _____

Other

Disability	Handicap	Veteran
Domestic violence	Domestic crime victim	Housing assistance
Unemployed	TANF/LIHEAP/SNAP	SSI
SSDI	Workers Comp	Homeless
Renting	Home owner	

Have you worked with anyone else? If yes, whom did you work with?

No _____ Yes _____

Date Opened: _____

Date Closed: _____

Phone Cell: _____

Phone Home: _____

Phone Work: _____

Mailing Address

Email

Best way to reach

Best time to reach

Employer Name

Employer Address

Spouse Name:

Date of Birth:

Social Security/ITIN:

Household Size: _____

Annual Income: _____

City of Wilmington Connection?

Live _____ Work _____

Worship _____ Study _____



Demographics 2

Income Eligibility

Family size	Income limit	Marital Status
1	\$31,900	Number of Dependents
2	\$43,100	
3	\$54,300	
4	\$65,500	Sources of Income
5	\$76,700	
6	\$87,900	
7	\$99,100	Other Notes
8	\$110,300	

How did you hear about us?

Dependents

Full Name	Birth date	SSN	Relationship	Lives home?

1. Do you have title to your home? _____
2. Are there tax liens? _____
3. Have you filed Chapter 7 bankruptcy? _____
4. Have filed Chapter 13 bankruptcy? _____
5. Have you paid sewer/water bills? _____
6. Did anyone offer you help with modification? _____
7. Were you guaranteed modification? _____
8. Are you a US Citizen? _____
9. Country of citizenship _____
10. Date entered the US _____
11. Report scam to www.preventloanscams.org; 800-347-3735

Filed Taxes? _____

Years not filed _____

IRS BILLS

Year	\$ Assessed
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

Tax Issue with

IRS _____

State _____

Current Tax status

Audit _____

30 Day _____

90 Day _____

Tax Ct _____

Foreclosure Prevention

First Mortgage: _____

2nd Mortgage: _____

Lender _____

Loan # _____

Days late _____

Mediation? _____

Sheriff sale _____

Modified before _____

Anything Else?
