



FIRST TIME HOME BUYER EDUCATION INTAKE FORM

Date: _____

How did you hear about this seminar?

- () Agency/Organization () Mailer/Flyer/Brochure () Friend/Relative () Lender/Mortgage Company () Newspaper () Internet () Someone who took a workshop () Other/Please Specify: _____

Buyer Information

Last Name: _____
First Name: _____
Date of Birth: _____
Social Security #: _____
Home Phone: _____
Cell Phone: _____
Email: _____

(for pre-purchase counseling only)

Residence

Street: _____
City, State, Zip: _____
Years at Residence: _____
Rent or Own?: _____
Rent Amount: \$ _____

Buyer Employment Information

Current Employer: _____
Company Address: _____
City, State, Zip: _____
Years at Job: _____
Hire Date: _____
Years in Profession: _____
Position: _____
Type of Business: _____
Annual Gross Income: \$ _____

Assets

Institution: XXXXXXXXXXXXXXXXXXXXXXXX
Type of Account XXXXXXXXXXXXXXXXXXXXXXXX
Current Balance: XXXXXXXXXXXXXXXXXXXXXXXX
Institution: XXXXXXXXXXXXXXXXXXXXXXXX
Type of Account XXXXXXXXXXXXXXXXXXXXXXXX
Current Balance: XXXXXXXXXXXXXXXXXXXXXXXX
Institution: XXXXXXXXXXXXXXXXXXXXXXXX
Type of Account XXXXXXXXXXXXXXXXXXXXXXXX
Current Balance: XXXXXXXXXXXXXXXXXXXXXXXX
401K/IRA/Retirement: XXXXXXXXXXXXXXXXXXXXXXXX

Demographics Information

- First time home buyer? () Yes () No
Gender: () Female () Male
Marital Status: () Single () Married () Separated
() Divorced () Widowed
Active Military: () Yes () No
Veteran: () Yes () No
Disabled: () Yes () No

Are you the Head of Household?() Yes () No

Household Size: Household Annual Income: \$ _____
(a) Number of Adults: _____
(b) Number of Children: _____



Homebuyer Services and the Boston Home Center
Empowering Boston residents to become successful homeowners
City of Boston, Marty Walsh, Mayor
Department of Neighborhood Development
Sheila A. Dillon, Chief and Director

See other side with arrow pointing right

Ethnicity/Race

Please check one:

- Hispanic/Latino ()
Non-Hispanic ()

Choose one from the list below:

- White ()
Black/African American ()
Asian ()
American Indian/Alaskan Native ()
Native Hawaiian/Other Pacific Islander ()
American Indian/Alaskan Native & White ()
Asian & White ()
Black/African American & White ()
Am. Indian/Alaskan Native & Black African Am. ()
Other Multiple Race ()

Age: () 20-30 () 31-40 () 41-50 () 51-60 () 60+

Have your parents or grandparents ever owned a house in the US? () Yes () No

Where were you born? USA/ US Territory (e.g. Puerto Rico): () Yes () No

Other Country/Please Specify: _____

Highest Level of education completed:

- () Less than High School () High School Diploma/GED
() 2-year college () Bachelor's degree
() Graduate school/post-secondary degree

Have you seen a copy of your credit report in the last year? () Yes () No

Do you know your credit score? () Yes () No

Where are you in the home buying process?

- () No idea where to begin
() Plan to purchase a house within 2 years
() Plan to purchase a house in 3 - 5 years
() Actively looking to buy a house now
() Actively working with a lender
() Actively working with a realtor
() Made an offer on a property
() Had the offer accepted
() Have signed a P&S agreement
() Have a closing date scheduled

What type of property are you planning to purchase?

- () Condominium () 2-family home
() Single-family home () 3-4 family home () Other: _____

NOAH will use this information to evaluate the First Time Homebuyer Education workshops and learn more about characteristics of who the program is serving. Information collected from this form is confidential.