

INTAKE ASSESSMENT

Date _____

Part One: Personal Data

Buyer Name: _____

Social Security Number: _____ Date of Birth: _____ Race: _____

Home Address: _____

Home Phone: _____ Work Phone: _____

How Long at Current Address: _____

Previous Address (if at current address less than two years): _____

Co-Buyer Name: _____

Social Security Number: _____ Date of Birth: _____ Race: _____

Home Address: _____

Home Phone: _____ Work Phone: _____

How Long at Current Address: _____

Previous Address (if at current address less than two years): _____

Part Two: Demographic Information

Buyer:

Are you a United States citizen or Resident Alien: _____ Yes _____ No

Are you a: _____ Single Head of Household _____ First Time Home Buyer
_____ First Generation Home Buyer

Are you now, or have you ever been in the U.S. Military? _____ Yes _____ No

If yes, give branch of service and dates of service: _____

Co-Buyer:

Are you a United States citizen or Resident Alien: _____ Yes _____ No

Are you a: _____ Single Head of Household _____ First Time Home Buyer
_____ First Generation Home Buyer

Are you now, or have you ever been in the U.S. Military? _____ Yes _____ No

If yes, give branch of service and dates of service: _____

Part Three: Employment and Income Information

BUYER

Present Employer _____

How Long _____ Dates from _____ to _____

Job Title _____

Employer Address _____

Full time _____ Part-time _____ hrs/week _____

Self-employed _____ Seasonal work _____

Are you paid: _____ weekly _____ monthly
_____ bi-weekly _____ bi-monthly

Rate of Pay: \$ _____ per: hour week month

Have you ever been laid off from this job? _____

If yes, how much and how often? _____

List previous employer if employed less than two years:

1. _____

Dates Employed _____ to _____

Job title _____

Rate of Pay: \$ _____ per: hour week month

2. _____

Dates Employed _____ to _____

Job title _____

Rate of Pay: \$ _____ per: hour week month

If currently employed in more than one position:

2nd employer: _____

Address: _____

Full time _____ Part-time _____ hrs/week _____

Rate of Pay: \$ _____ per: hour week month

Do you receive income from any of the following:

_____ Bonuses \$ _____/month

_____ Commissions \$ _____/month

_____ Tips \$ _____/month

_____ Unemployment \$ _____/month until _____

_____ Alimony \$ _____/month until _____

_____ Child Support \$ _____/month until _____

_____ MFIP \$ _____/month

_____ Social Security \$ _____/month

_____ SSI \$ _____/month

_____ Other _____ \$ _____/month

Total Income

\$ _____/month x 12 \$ _____/year

CO-BUYER

Present Employer _____

How Long _____ Dates from _____ to _____

Job Title _____

Employer Address _____

Full time _____ Part-time _____ hrs/week _____

Self-employed _____ Seasonal work _____

Are you paid: _____ weekly _____ monthly
_____ bi-weekly _____ bi-monthly

Rate of Pay: \$ _____ per: hour week month

Have you ever been laid off from this job? _____

If yes, how much and how often? _____

List previous employer if employed less than two years:

1. _____

Dates Employed _____ to _____

Job title _____

Rate of Pay: \$ _____ per: hour week month

2. _____

Dates Employed _____ to _____

Job title _____

Rate of Pay: \$ _____ per: hour week month

If currently employed in more than one position:

2nd employer: _____

Address: _____

Full time _____ Part-time _____ hrs/week _____

Rate of Pay: \$ _____ per: hour week month

Do you receive income from any of the following:

_____ Bonuses \$ _____/month

_____ Commissions \$ _____/month

_____ Tips \$ _____/month

_____ Unemployment \$ _____/month until _____

_____ Alimony \$ _____/month until _____

_____ Child Support \$ _____/month until _____

_____ MFIP \$ _____/month

_____ Social Security \$ _____/month

_____ SSI \$ _____/month

_____ Other _____ \$ _____/month

Total Income

\$ _____/month x 12 \$ _____/year

Part Four: Liabilities and Expenses

BUYER LIABILITIES

Auto Loan

Monthly Payment \$ _____ Balance Due \$ _____

Student Loan

Monthly Payment \$ _____ Balance Due \$ _____

Other Loan

Monthly Payment \$ _____ Balance Due \$ _____

Other Loan

Monthly Payment \$ _____ Balance Due \$ _____

Credit Card

Monthly Payment \$ _____ Balance Due \$ _____

Credit Card

Monthly Payment \$ _____ Balance Due \$ _____

Credit Card

Monthly Payment \$ _____ Balance Due \$ _____

Child Support

Monthly Amount \$ _____

Alimony/Spousal Support

Monthly Amount \$ _____

Rent

Landlord Name _____

Address _____

Monthly Rent \$ _____

What Utilities are you responsible for paying? _____

Daycare Expenses

Provider Name _____

Address _____

Phone _____ Monthly Amount \$ _____

Miscellaneous Expenses

1. _____

Monthly Payment \$ _____ Balance Due \$ _____

2. _____

Monthly Payment \$ _____ Balance Due \$ _____

3. _____

Monthly Payment \$ _____ Balance Due \$ _____

Buyer Total Monthly Liabilities \$ _____

CO-BUYER LIABILITIES

Auto Loan

Monthly Payment \$ _____ Balance Due \$ _____

Student Loan

Monthly Payment \$ _____ Balance Due \$ _____

Other Loan

Monthly Payment \$ _____ Balance Due \$ _____

Other Loan

Monthly Payment \$ _____ Balance Due \$ _____

Credit Card

Monthly Payment \$ _____ Balance Due \$ _____

Credit Card

Monthly Payment \$ _____ Balance Due \$ _____

Credit Card

Monthly Payment \$ _____ Balance Due \$ _____

Child Support

Monthly Amount \$ _____

Alimony/Spousal Support

Monthly Amount \$ _____

Rent

Landlord Name _____

Address _____

Monthly Rent \$ _____

What Utilities are you responsible for paying? _____

Daycare Expenses

Provider Name _____

Address _____

Phone _____ Monthly Amount \$ _____

Miscellaneous Expenses

1. _____

Monthly Payment \$ _____ Balance Due \$ _____

2. _____

Monthly Payment \$ _____ Balance Due \$ _____

3. _____

Monthly Payment \$ _____ Balance Due \$ _____

Co-Buyer's Total Monthly Liabilities \$ _____

TOTAL COMBINED LIABILITIES: _____

Part Five: Legal and Financial History

Please answer the following questions by checking the appropriate space before Yes or No. Use a separate sheet of paper to clarify any "Yes" answers.

BUYER

- 1. Are there any outstanding judgments against you? Yes No
- 2. Have all satisfactions of judgments been recorded? Yes No
- 3. Have you declared bankruptcy within the past seven years? Yes No
- 4. Have you had property foreclosed upon, or given title or deed in lieu there of in the last seven years? Yes No
- 5. Have you ever defaulted on a State or Federal Loan, including student loans? Yes No
- 6. Are you currently party to a lawsuit? Yes No
- 7. Are you a co-signer on any loans, including student loans?
If yes, please include these commitments in the liability section on page 3 Yes No
- 8. Do you have any debt obligations as a result of a divorce?
If yes, please include these commitments in the liability section on page 3 Yes No

CO-BUYER

- 1. Are there any outstanding judgments against you? Yes No
- 2. Have all satisfactions of judgments been recorded? Yes No
- 3. Have you declared bankruptcy within the past seven years? Yes No
- 4. Have you had property foreclosed upon, or given title or deed in lieu there of in the last seven years? Yes No
- 5. Have you ever defaulted on a State or Federal Loan, including student loans? Yes No
- 6. Are you currently party to a lawsuit? Yes No
- 7. Are you a co-signer on any loans, including student loans?
If yes, please include these commitments in the liability section on page 3 Yes No
- 8. Do you have any debt obligations as a result of a divorce?
If yes, please include these commitments in the liability section on page 3 Yes No

I declare the above information to be complete and correct to the best of my knowledge. By signing this assessment, I am no way obligated to follow through with, or guaranteed assistance with, the Housing Choice Voucher Homeownership Program. I authorize Brainerd HRA to discuss my/our file with credit counseling agencies, mortgage lenders, realtors, and/or other representatives in connection with the program.

Buyer Signature

Date

Co-Buyer Signature

Date