

INTAKE APPLICATION

Today's Date: _____

Applicant:

First Name: _____

Middle Initial: _____

Last Name: _____

Date of Birth (mm/dd/yyyy): _____

SSN: _____

Sex:

- Male
- Female

Marital Status:

- Single
- Married
- Divorced
- Separated

Relationship to Co-Applicant: _____

Education (last level completed): _____

Do you identify as any of the following? (select all that apply)

- Veteran
- Active Military
- Foreign Born
- Disabled

Are you currently employed?

- Yes
- No

Property Address: _____

Mailing address (if different from property address): _____

County: _____

Home Phone #: _____

Cell #: _____

Work #: _____

Email address: _____

Total household size: _____

#of Adults: _____

#of Children: _____

#of Seniors: _____

Type of residence (select one):

- Single Family
- 2-family or Duplex
- 3-family
- 4-family (or more)
- Condo

Co-Applicant:

First Name: _____

Middle Initial: _____

Last Name: _____

Date of Birth (mm/dd/yyyy): _____

SSN: _____

Sex:

- Male
- Female

Marital Status:

- Single
- Married
- Divorced
- Separated

Relationship to Applicant: _____

Education (last level completed): _____

Do you identify as any of the following? (Select all that apply)

- Veteran
- Active Military
- Foreign Born
- Disabled

Are you currently employed?

- Yes
- No

Preferred Method of contact:

- Home
- Cell
- Work
- Email

- Co-Op
- Mobile/Manufactured
- Rental property
- Other: _____

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Reason for default (check all that apply):

- Loss of income
- Reduction in income
- Increase in expenses
- Increase in loan payment
- Medical issues
- Poor budget management skills
- Divorce or separation
- Death of family member
- Subprime/unconventional loan product
- Payment dispute
- Owe property and/or school Taxes
- Failed business venture
- Other: _____

Do you currently live in your home?

- Yes
- No

Who is listed on the deed? _____

Who is listed on the mortgage/note? _____

Is someone other than yourself is listed on the deed and the mortgage?

- Yes
- No

If yes, who are they and what is their relationship to you? _____

If yes, are they living in the home with you?

- Yes
- No

If no, and that person was your spouse, do you have a formal separation agreement or divorce decree?

- Yes
- No

If yes, include a copy with the intake materials.

If you have a separation agreement or divorce decree, what does it say regarding who is responsible for the payment and maintenance of the home? _____

If you are not the only person on the deed/mortgage and that person does not live with you, do you have a way of contacting that person?

- Yes
- No

What is your goal for the home?

- Remain in the home
- Sell/Short Sale

If sell, have you listed your home with a real estate agent?

- Yes
- No

If yes, provide the name and address of agency

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Have you worked with your lender to resolve the issue?

- Yes No

If yes, what was the result?

Do you have a trial modification?

- Yes No

If yes, how long have you had it? Is it complete?

Have you worked with a housing counselor?

- Yes No

If yes, whom? _____

Have you been served with a summons and complaint?

- Yes No

If yes, when? How were you served? _____

If yes, have you received a date for a judicial hearing or settlement conference? When: _____

If yes, include a copy with the intake materials.

If yes, did you respond in writing to the court and the attorney listed on the summons and complaint?

- Yes No

If yes, include a copy with the intake materials.

Is the bank suing you the same as the bank with whom you originated your loan?

- Yes No

If no, what was the name of the company that approved your loan? _____

Have you ever filed bankruptcy?

- Yes No

If yes, was it a:

- Chapter 7 Chapter 13

If yes, who was the attorney? _____

If yes, when was it filed? _____

If yes, what was the result? _____

If yes, when was it discharged? _____

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Type of Mortgage:

- Fixed Rate Mortgage
 - Adjustable Rate Mortgage
 - Interest Only Loan
 - Option Adjustable Rate Mortgage
 - Home Equity Line of Credit
 - Hybrid Adjustable Rate Mortgage
- Subprime Home Loan
 - 80/2- Subprime Home Loan
 - Tenant – Landlord is in Foreclosure
 - Other: _____
 - Unknown

Mortgage 1		Mortgage 2	
Lender/Servicer		Lender/Servicer	\$
Year mortgage was obtained		Year mortgage was obtained	
Original loan amount		Original loan amount.	
Interest rate		Interest rate	
Loan term		Loan term	
Unpaid mortgage balance		Unpaid mortgage balance	
Monthly mortgage payment		Monthly mortgage payment	
Date of last payment		Date of last payment	
Amount past due		Amount past due	
Government backed mortgage? (Y/N). For example: FHA, VA, USDA, SONYMA, Fannie Mae, Freddie Mac. If yes, indicate type.		Government backed mortgage? (Y/N). For example, FHA, VA, USDA, SONYMA, Fannie Mae, Freddie Mac. If yes, indicate type.	

Are your taxes escrowed?

- Yes No
- If no, are you current on your taxes?
- Yes No

Do you have a current homeowner's insurance policy?

- Yes No
- If yes, is your insurance escrowed?
- Yes No
- If not escrowed, are you behind on your insurance payment?
- Yes No

What is the current value of the property? _____

Do you own any other property(s)?

- Yes No
- If yes, do you receive rental income?
- Yes No

If yes, provide the rental / lease agreements

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Household Budget

Monthly Income		Monthly Debt(not expenses)	
Wages (gross):	\$	Mortgage payment	\$
Social Security	\$	Home equity loan/2 nd mortgage	\$
Unemployment	\$	Property Tax	\$
Pension:	\$	School Tax	\$
Workers' Compensation	\$	Homeowners Insurance	\$
Food Stamps/HEAP	\$	Auto Loan	\$
Rental income	\$	Credit Cards	\$
Other (please indicate):	\$	Student loans	\$
Total income	\$	Total debt	\$

Do you have money saved for your mortgage?

Yes

No

If yes, how much? _____

Do you have others contributing to the household expenses, who are not your spouse or party to the note and mortgage (ex: adult children, renters)?

Yes

No

If yes, how much? _____

Where did you hear about HAPEC's Default/Foreclosure Intervention Counseling Program? _____