## PRE-PURCHASE COUNSELING INTAKE FORM CHECKLIST



## **DIRECTIONS:**

You must submit your completed intake forms prior to scheduling your appointment. Supporting documents are required to be submitted for each adult in the household, 18+.

We will review your documents within three business days and contact you to schedule an appointment.

1	INTAKE FORMS Fill out the attached intake forms
	Attach supporting documents (see step 2)
2	SUPPORTING DOCUMENTS (PROVIDE ALL THAT APPLY) Completed budget template (attached) for entire household
	Copy of credit report pulled within the last 30 days. This credit report is considered a "soft pull" and will not affect your credit score. CPAH Can assist you with pulling a free report from Credit Karma or we can obtain through our service for \$25.
	<b>30 days of proof of income</b> Please include all sources of income for each adult including pay stubs, pension statements, social security award letters, proof of court-ordered child support, etc.
	Most recent federal tax return or all applicable W2's, 1099's etc. If self-employed: include the last 2 years of business federal returns.
	Most recent bank statements for all open accounts Please include all pages, even if some are blank.
	Copy of your Loan Estimate (if applicable)
3	SUBMISSION

Submit by mail or drop off to the address listed above, email to rshakya@cpahousing.org, or fax to 847-796-8060



*If you have an impairment, disability, language barrier, or otherwise require an alternative means of completing this form or accessing information about housing counseling, please contact us about arranging alternative accommodations.* 

## **Pre-Purchase Counseling Intake Form**

Applicant Name:			Co-Applicant Name:			
Address:			Address:			
City:	_ State:	Zip Code:	City:	State:	Zip Code:	
Cell Phone:	_Other Phor	ne:	Cell Phone:	Other Phone	:	
Email:			Email:			
Social Security #	D.	D.B:	Social Security #	D.0.	B:	
Have you had a judgement entered against you?:  Yes  No Have you been a Co-Signer on a Mortgage:  Yes  No Have you filed for bankruptcy?: Yes No Release/Discharge Date:			Have you had a judgement entered against you?:  Yes  No Have you been a Co-Signer on a Mortgage:  Yes  No Have you filed for bankruptcy?: Yes No Release/Discharge Date:			
Number of people in current household: Ages: What is the number of people anticipated in your future household: Ages: Does anyone in your household reside with you less than full time: TYes No If yes, please explain:						
Do you currently: 🗖 Rent 🗖 Own	Has	anyone in the household own	ned a house in the last 3 yea	ars? 🗖 Yes 🗖 No		
Desired Monthly Payment: \$	Но	w were you referred to CPAH	<u></u>			
Have you taken a Homebuyer Educa	ation class?	Yes 🔲 No If yes, please li	st date & which agency:			
Have you attended a CLT Info Sessio	on? 🗖 Yes 🕻	☐ No If yes, please indicate c	late:			
DEMOGRAPHIC INFORMATIO	DN .		CO-APPLICANT DEMO	OGRAPHIC INFORM	ATION	
Ethnicity: 🗖 Hispanic/Latino 🗍 N	ot Hispanic/	Latino	Ethnicity: 🗖 Hispanic/La	tino 🔲 Not Hispanic/I	Latino	
Race: American Indian/Alaskan Native Asian Black or African American Native Hawaiian or Other Pacific Islander White Multiple Races Choose not to Respond			Race:  American Indian/Alaskan Native  Asian  Asian & White Black or African American  Native Hawaiian or Other Pacific Islander White  Multiple Races  Choose not to Respond			
Head of Household: Single N Widowed Other:	Narried 🗖 Se	eparated	Head of Household:  Sin Widowed Other:	•	oarated  Divorced Prefer not to say	

Gender Identity/preferred pronouns:	Gender Identity/preferred pronouns:					
U.S. Citizen: 🗋 Yes 🗋 No 🛛 Permanent Res. Alien: 🗋 Yes 🗖 No	U.S. Citizen: 🗌 Yes 🗌 No 🛛 Permanent Res. Alien: 🔲 Yes 🔲 No					
Military Status: 🗖 Active Duty 🗖 Veteran	Military Status: 🗖 Active Duty 🗖 Veteran					
Primary Language Spoken in Household:	Primary Language Spoken in Household:					
Highest Education Level: High School Some College Degree	e Highest Education Level: 🔲 High School 🗖 Some College 🗖 Degree					
EMPLOYMENT	CO-APPLICANT EMPLOYMENT					
Are you self-employed? 🗖 Yes 🗖 No	Are you self-employed? 🗖 Yes 🗖 No					
Employer:	Employer:					
City: State: Zip Code:	City: State: Zip Code:					
Years at Current Employer:	Years at Current Employer:					
Do you have two continuous years in the same line of work? $\Box$ Yes	$\Box$ No Do you have two continuous years in the same line of work? $\Box$ Yes $\Box$ No					
Current Gross Monthly Income \$ (Income BEFOR Do you receive any of the following: Bonuses, commission, child supp	E Taxes) Current Gross Monthly Income \$ (Income BEFORE Taxes) port, SS/SSDI, unemployment, etc.?					
Overtime \$	Overtime \$					
TOTAL \$	TOTAL \$					
In addition to the applicants, will there be additional household men	nbers receiving income? 🗖 Yes 🗖 No					
HOUSEHOLD ASSETS (combination of applicant, co-app	licant, and other household members)					
Checking \$	Stocks/Mutual Funds \$					
Savings \$	Gifts \$					
401 (k), IRA, Pension \$	Other \$					
I/We authorize Community Partners for Affordable Housing (CPAH) programs. I/We certify that all information contained in this applica	to obtain and/or review my/our credit report(s) to determine our eligibility for CPAH ation is true and correct, to the best of my knowledge.					
I/We agree to allow CPAH to obtain and/or review my/our credit report I/We do not agree to allow CPAH to obtain and/or review my/our credit report						

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Applicant Signature

Date

Co-Applicant Signature

Date

Expense Category         Expense Description         Monthly Amount         Owed           Housing         Rental Insurance	MONTHLY EXPENSES AND DEBTS							
Expense Category         Expense Description         Monthly Amount         Owed           Housing         Rental Insurance	Name:	Date:	Household Size:					
Rental Insurance         Maintenance/Supplies         Improvements         Utilities         Phone (Land Line)         Cell Phone         Gas         Electric         Cable         Water/Garbage/Sewer         Transportation         Gasoline         Vater/Garbage/Sewer         Transportation         Gasoline         Repairs & Maintenance         IPASS / Tolls / Parking         Public Transportation         Household Expenses         Groceries         Non-Food Supplies         Personal Care         Clothing         Education         Insurance         Life         Dental         Destallity         Medical         Dental         Other         Child Care         Sports         Cash / Entertainment         Spending Money         Streaming services (Netflix, Disney+, etc.)         Vacation         Gifts         Dues         Miscellaneous / Other         Cash / Entertainment         Spending Money         Streaming se	Expense Category	Expense Description	Monthly Amount	Total Amount Owed				
Maintenance/Supplies     Improvements       Utilities     Phone (Land Line)       Cell Phone     Gas       Electric     Cable       Cable     Mater/Garbage/Sewer       Transportation     Gasoline       Car Insurance     Public Transportation       Repairs & Maintenance     Public Transportation       Household Expenses     Groceries       Non-Food Supplies     Personal Care       Clothing     Education       Education     Education       Insurance     Life       Dental     Dental       Disability     Medication       Child Care     Child Care       Child Care     Child Care       Streaming services (Netflix, Disney+, etc.)     Streaming services (Netflix, Disney+, etc.)       Dues     Other       Child Care     Child Care       Miscellaneous / Other     Child Care       Dues     Maxing services (Netflix, Disney+, etc.)       Miscellaneous / Other     Satron       Child Care     Maxing services (Netflix, Disney+, etc.)       Maxing services (Netflix, Disney+, etc.)     Uses       Miscellaneous / Other     Satron       Cash / Entertainment     Spenting Services (Netflix, Disney+, etc.)       Dues     Miscellaneous / Other       Savings	Housing	Rent/Mortgage/Other						
Improvements       Improvements         Utilities       Phone (Land Line)         Call Phone       Call Phone         Gas       Electric         Cable       Improvements         Vater/Garbage/Sewer       Improvements         Transportation       Gasoline         Car Insurance       Improvements         Repairs & Maintenance       Improvements         Public Transportation       Improvements         Household Expenses       Groceries         Non-Food Supplies       Improvements         Clothing       Education         Education       Education         Insurance       Life         Dental       Improvements         Octor Visits       Improvements         Medication       Improvements         Child Care       Child Care         Child Care       Child Care         Child Care       Streaming services (Netflix, Disney+, etc.)         Cash / Entertainment       Spending Money         Streaming services (Netflix, Disney+, etc.)       Improvements         Dues / Donations       Church / Charity         Dues / Donations       Church / Charity         Dues       Metical Ling         Muscellaneous / O		Rental Insurance						
Utilities       Phone (Land Line)         Cell Phone		Maintenance/Supplies						
Cell Phone         Gas         Electric         Cable         Water/Carbage/Sewer         Transportation         Gasoline         Car Insurance         Repairs & Maintenance         IPASS / Tolls / Parking         Public Transportation         Household Expenses         Graceries         Non-Food Supplies         Personal Care         Clothing         Education         Insurance         Life         Medical         Dental         Medical         Other         Child Care         Child Care         Child Care         Child Care         Child Care         Cabing Money         Streaming services (Netflix, Disney+, etc.)         Vacation         Gifts         Dues         Miscellaneous / Other         Surges         Church / Charity         Loans / Credit         Car Loan 1         Loans / Credit         Car Loan 1		Improvements						
Gas       Electric         Cable       Water/Garbage/Sewer         Transportation       Gasoline         Car Insurance       Image: Carling and the carling a	Utilities	Phone (Land Line)						
Electric         Cable         Water/Garbage/Sewer         Transportation         Gasoline         Car Insurance         Repairs & Maintenance         IPASS / Tolls / Parking         Public Transportation         Household Expenses         Groceries         Non-Food Supplies         Personal Care         Clothing         Education         Insurance         Life         Medical         Dental         Disability         Medication         Other         Child Care         Child Care         Child Care         Sports         Cash / Entertainment         Sports         Question         Gifts         Dues / Donations         Church / Charity         Question		Cell Phone						
Cable       Water/Garbage/Sewer         Transportation       Gasoline         Car Insurance       Repairs & Maintenance         IPASS / Tolls / Parking       Public Transportation         Household Expenses       Groceries         Non-Food Supplies       Personal Care         Clothing       Education         Insurance       Life         Dental       Dental         Dental       Doctor Visits         Medical       Other         Child Care       Child Care         Sports       Streaming services (Netflix, Disney+, etc.)         Vacation       Gifts         Dues       Gifts         Dues       Medical and		Gas						
Water/Garbage/Sewer         Transportation         Gasoline         Car Insurance         Repairs & Maintenance         IPASS / Tolls / Parking         Public Transportation         Household Expenses         Groceries         Non-Food Supplies         Clothing         Education         Insurance         Life         Dental         Disability         Medical         Other         Child Care         Child Care         Sports         Cash / Entertainment         Spending Money         Streaming services (Netflix, Disney+, etc.)         Vacation         Gifts         Dues         Miscellaneous / Other         Current         Child Care         Streaming services (Netflix, Disney+, etc.)         Vacation         Gifts         Dues         Miscellaneous / Other         Savings         Miscellaneous / Other         Car Loan 1         Car Loan 2         Installment Loan 1		Electric						
Transportation       Gasoline         Car Insurance       Repairs & Maintenance         IPASS / Tolls / Parking       Public Transportation         Household Expenses       Groceries         Non-Food Supplies       Personal Care         Clothing       Education         Insurance       Life         Medical       Dental         Disability       Medicat         Medication       Other         Child Care       Other         Child Care       Child Care         Sports       Sports         Cash / Entertainment       Spending Money         Streaming services (Netflix, Disney+, etc.)       Streaming services (Netflix, Disney+, etc.)         Uses       Dues         Miscellaneous / Other       Church / Charity         Dues       Dues         Miscellaneous / Other       Church / Charity         Loans / Credit       Car Loan 1         Loans / Credit       Car Loan 1         Installment Loan 1       Installment Loan 1								
Car Insurance       Repairs & Maintenance         IPASS / Tolls / Parking       IPASS / Tolls / Parking         Public Transportation       Public Transportation         Household Expenses       Groceries         Non-Food Supplies       Image: Streaming and the st								
Repairs & Maintenance       IPASS / Tolls / Parking         Public Transportation       Public Transportation         Household Expenses       Groceries         Non-Food Supplies       Image: Constraint of the system of t	Transportation							
IPASS / Tolls / Parking         Public Transportation         Household Expenses         Groceries         Non-Food Supplies         Personal Care         Clothing         Education         Insurance         Life         Dental         Disability         Medical         Disability         Medication         Child Care         Child Care         Child Care         Sports         Cash / Entertainment         Spending Money         Streaming services (Netflix, Disney+, etc.)         Vacation         Gifts         Dues         Miscellaneous / Other         Church / Charity         Dues         Miscellaneous / Other         Loans / Credit       Car Loan 1         Installment Loan 1								
Public Transportation       Image: Second Seco								
Household Expenses       Groceries         Non-Food Supplies       Personal Care         Clothing       Education         Education       Education         Insurance       Life         Medical       Insurance         Dental       Dental         Medical       Insurance         Dental       Insurance         Dental       Insurance         Desability       Insurance         Medication       Insurance         Other       Child Care         Child Care       Insurance         Sports       Insurance         Cash / Entertainment       Spending Money         Streaming services (Netflix, Disney+, etc.)       Insurance         Uses       Insurance         Dues / Donations       Church / Charity         Dues       Insurance       Insurance         Miscellaneous / Other       Savings       Insurance         Installment Loan 1       Installment Loan 1       Installment Loan 1								
Non-Food Supplies         Personal Care         Clothing         Education         Education         Insurance         Life         Medical         Dental         Disability         Medical         Other         Child Care         Sports         Cash / Entertainment         Spending Money         Streaming services (Netflix, Disney+, etc.)         Vacation         Gifts         Dues         Miscellaneous / Other         Car Loan 1         Car Loan 2         Installment Loan 1								
Personal Care       Image: Clothing         Education       Education         Insurance       Life         Medical       Image: Clothing         Dental       Image: Clothing         Dental       Image: Clothing         Medical       Image: Clothing         Clother       Image: Clothing         Clother       Image: Clothing         Image: Clothing       Image: Clothing         Image: Clothing       Image: Clothing         Image: Clothing       Image: Clothing         Image: Clothing <t< td=""><td>Household Expenses</td><td></td><td></td><td></td></t<>	Household Expenses							
Clothing								
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Insurance       Life         Medical       Image: Constraint of the second		-						
Medical       Dental         Disability       Disability         Medical       Doctor Visits         Medication       Medication         Other       Other         Child Care       Medication         Sports       Streaming services (Netflix, Disney+, etc.)         Vacation       Vacation         Gifts       Dues         Miscellaneous / Other       Savings         Other       Car Loan 1         Car Loan 1       Installment Loan 1								
DentalDentalDisabilityDisabilityMedicalDoctor VisitsMedicationMedicationOtherOtherChild CareSportsCash / EntertainmentSpending MoneyStreaming services (Netflix, Disney+, etc.)Streaming services (Netflix, Disney+, etc.)VacationImage: Comparison of the service of the s	Insurance							
Disability       Disability         Medical       Doctor Visits         Medication       Medication         Other       Other         Child Care       Sports         Cash / Entertainment       Spending Money         Streaming services (Netflix, Disney+, etc.)       Streaming services (Netflix, Disney+, etc.)         Vacation       Streaming services (Netflix, Disney+, etc.)         Dues       Dues         Miscellaneous / Other       Savings         Other       Car Loan 1         Car Loan 2       Installment Loan 1								
Medical       Doctor Visits         Medication          Other          Child Care          Sports          Cash / Entertainment       Spending Money         Streaming services (Netflix, Disney+, etc.)          Vacation          Gifts          Dues / Donations       Church / Charity         Dues          Miscellaneous / Other       Savings         Other          Loans / Credit       Car Loan 1         Installment Loan 1								
Medication       Medication         Other       Other         Child Care       Sports         Sports       Image: Cash / Entertainment         Spending Money       Streaming services (Netflix, Disney+, etc.)         Vacation       Image: Cash / Charity         Uses / Donations       Church / Charity         Dues / Donations       Church / Charity         Miscellaneous / Other       Savings         Other       Car Loan 1         Loans / Credit       Car Loan 2         Installment Loan 1       Image: Cash 2								
OtherOtherChild CareSportsSportsStreaming MoneyCash / EntertainmentSpending MoneyStreaming services (Netflix, Disney+, etc.)Streaming services (Netflix, Disney+, etc.)VacationGiftsUes / DonationsChurch / CharityDuesDuesMiscellaneous / OtherSavingsOtherCar Loan 1Loans / CreditCar Loan 1Installment Loan 1Installment Loan 1	Medical							
Child Care       Child Care         Sports       Sports         Cash / Entertainment       Spending Money         Streaming services (Netflix, Disney+, etc.)       Vacation         Vacation       Gifts         Dues / Donations       Church / Charity         Dues       Dues         Miscellaneous / Other       Savings         Other       Car Loan 1         Installment Loan 1       Installment Loan 1								
Sports       Sports         Cash / Entertainment       Spending Money         Streaming services (Netflix, Disney+, etc.)       Streaming services (Netflix, Disney+, etc.)         Vacation       Vacation         Gifts       Streaming services (Netflix, Disney+, etc.)         Dues / Donations       Church / Charity         Dues       Dues         Miscellaneous / Other       Savings         Other       Other         Loans / Credit       Car Loan 1         Installment Loan 1       Installment Loan 1								
Cash / Entertainment       Spending Money         Streaming services (Netflix, Disney+, etc.)       Vacation         Vacation       Gifts         Dues / Donations       Church / Charity         Dues       Dues         Miscellaneous / Other       Savings         Other       Car Loan 1         Loans / Credit       Car Loan 2         Installment Loan 1       Installment Loan 1	Child Care							
Streaming services (Netflix, Disney+, etc.)         Vacation         Gifts         Dues / Donations         Church / Charity         Dues         Miscellaneous / Other         Savings         Other         Loans / Credit         Car Loan 1         Installment Loan 1	Oach / Entertainment							
Vacation       Image: Constraint of the second	Cash / Entertainment	Streaming services (Netflix, Disney+,						
Gifts       Gifts         Dues / Donations       Church / Charity         Dues       Dues         Miscellaneous / Other       Savings         Other       Other         Loans / Credit       Car Loan 1         Car Loan 2       Installment Loan 1		,						
Dues     Dues       Miscellaneous / Other     Savings       Other     Other       Loans / Credit     Car Loan 1       Car Loan 2     Installment Loan 1								
Dues     Dues       Miscellaneous / Other     Savings       Other     Other       Loans / Credit     Car Loan 1       Car Loan 2     Installment Loan 1	Dues / Donations	Church / Charity						
Miscellaneous / Other     Savings       Other     Other       Loans / Credit     Car Loan 1       Car Loan 2     Installment Loan 1								
Other     Other       Loans / Credit     Car Loan 1       Car Loan 2     Installment Loan 1	Miscellaneous / Other	Savings						
Car Loan 2       Installment Loan 1								
Installment Loan 1	Loans / Credit	Car Loan 1						
		Car Loan 2						
		Installment Loan 1						
Installment Loan 2		Installment Loan 2						
Credit Card 1		Credit Card 1						
Credit Card 2		Credit Card 2						
Student Loan 1		Student Loan 1						
Student Loan 2								
Other		Other						
Total Expenses   \$ -   \$ -	Total Expenses		\$ -	\$ -				
Total Income \$ -	Total Income		\$ -					
Difference + (-) \$ -	Difference + (-)		\$ -					