

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.
- 30 days of proof of income
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 rszakya@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 Phone: _____	Cell Phone: _____ Other Phone: _____
Email: _____	Email: _____
Social Security # _____ D.O.B: _____	Social Security # _____ D.O.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: _____

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 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: Yes No If yes, please explain:

Do you currently: Rent Own Has anyone in the household owned a house in the last 3 years? Yes No

Desired Monthly Payment: \$_____ How were you referred to CPAH: _____

Have you taken a Homebuyer Education class? Yes No If yes, please list date & which agency: _____

Have you attended a CLT Info Session? Yes No If yes, please indicate date: _____

DEMOGRAPHIC INFORMATION

Ethnicity: Hispanic/Latino Not Hispanic/Latino

Race: American Indian/Alaskan Native Asian
 Black or African American Native Hawaiian or Other Pacific Islander
 White Multiple Races Choose not to Respond

Head of Household: Single Married Separated Divorced
 Widowed Other: _____ Prefer not to say

CO-APPLICANT DEMOGRAPHIC INFORMATION

Ethnicity: Hispanic/Latino Not Hispanic/Latino

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 Married Separated Divorced
 Widowed Other: _____ Prefer not to say

Gender Identity/preferred pronouns: _____

Gender Identity/preferred pronouns: _____

U.S. Citizen: Yes No Permanent Res. Alien: Yes No

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Military Status: Active Duty Veteran

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Primary Language Spoken in Household: _____

Primary Language Spoken in Household: _____

Highest Education Level: High School Some College Degree
 Prefer not to say

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 Prefer not to say

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? Yes No

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Current Gross Monthly Income \$ _____ (Income BEFORE Taxes)

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Do you receive any of the following: Bonuses, commission, child support, SS/SSDI, unemployment, etc.? _____

Overtime \$ _____

Overtime \$ _____

TOTAL \$ _____

TOTAL \$ _____

In addition to the applicants, will there be additional household members receiving income? Yes No

HOUSEHOLD ASSETS (combination of applicant, co-applicant, and other household members)

Checking \$ _____

Stocks/Mutual Funds \$ _____

Savings \$ _____

Gifts \$ _____

401 (k), IRA, Pension \$ _____

Other \$ _____

I/We authorize Community Partners for Affordable Housing (CPAH) to obtain and/or review my/our credit report(s) to determine our eligibility for CPAH programs. I/We certify that all information contained in this application 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

Applicant Signature

Date

Co-Applicant Signature

Date

MONTHLY EXPENSES AND DEBTS

Name: _____ **Date:** _____ **Household Size:** _____

Expense Category	Expense Description	Monthly Amount	Total Amount Owed	
Housing	Rent/Mortgage/Other			
	Rental Insurance			
	Maintenance/Supplies			
	Improvements			
Utilities	Phone (Land Line)			
	Cell Phone			
	Gas			
	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	Education			
Insurance	Life			
	Medical			
	Dental			
	Disability			
Medical	Doctor Visits			
	Medication			
	Other			
Child Care	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			
	Car Loan 2			
	Installment Loan 1			
	Installment Loan 2			
	Credit Card 1			
	Credit Card 2			
	Student Loan 1			
	Student Loan 2			
	Other			
	Total Expenses		\$ -	\$ -
Total Income		\$ -		
Difference + (-)		\$ -		