

Date _____
Case# _____
(Trainer completes)

Trainer _____
Organization _____
County _____
(Trainer completes)

## THDA Homebuyer Education Initiative Customer Intake Form

**Please provide information about yourself for customer tracking purposes. Thank you.**

First Name: \_\_\_\_\_ MI: \_\_\_\_\_ Last Name: \_\_\_\_\_  
(Primary Applicant)

First Name: \_\_\_\_\_ MI: \_\_\_\_\_ Last Name: \_\_\_\_\_  
(Co-Applicant)

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

County: \_\_\_\_\_ Home Phone \_\_\_\_\_

**Applicant**

**Co-Applicant**

Work Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Birth Date: \_\_\_\_\_

SS Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

**Ethnicity**

- a. Hispanic
- b. Non-Hispanic

**Applicant**

**Co-Applicant**

\_\_\_\_\_  
\_\_\_\_\_

**Race**

**Single Race**

- a. American Indian/Alaskan native
- b. Asian
- c. Black or African American
- d. Native Hawaiian or Other Pacific Islander
- e. White

**Multi-Race**

- f. American Indian or Alaskan Native and White
- g. Asian and White
- h. Black or African American and White
- i. American Indian or Alaskan Native and Black or African American
- j. Other multiple race

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

**Gender of Applicant(s)**

k. Male

l. Female

\_\_\_\_\_  
\_\_\_\_\_

**Marital Status of Applicant(s)**

Single

Married

Divorced

Separated

Widowed

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Female head of household

First time home buyer

Disabled

Senior (age 62 or older)

Owned home within past three years?

Veteran

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Family Size** \_\_\_\_\_

**Annual gross income (before taxes)**

**Monthly gross income**

Applicant \_\_\_\_\_

Co-applicant \_\_\_\_\_

Total \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Current Rent or Mortgage payment** \_\_\_\_\_

**How did you hear about our homebuyer counseling or homebuyer education classes?**

- Newspaper
- Bank
- Government
- Walk-in
- Staff member
- Homebuyer fair

- Previous customer
- Friend/relative
- Realtor
- Flyer
- TV/radio
- Other

**THDA LOAN APPLICANT**

Approved: Great Choice Plus (Down Payment Assistance) Loan

Approved: Great Choice

Closing Scheduled: \_\_\_\_\_ (Date)

Not Yet Approved

Lender: \_\_\_\_\_

Loan Officer: \_\_\_\_\_ Phone: \_\_\_\_\_

**CUSTOMER SIGNATURE** \_\_\_\_\_