Hawai'i HomeOwnership Center
NeighborWorks® HomeOwnership Center

All documents sent to Oahu for processing
1259 Aala St., Ste. 201, Honolulu, HI 96817
Phone: (808) 523-9500 Fax (808) 523-9502
Secure Document Submission Available: http://www.hihomeownership.org

INTAKE FORM

Note: In order for us to make a Preliminary Readiness Assessment, which will identify potential barriers in your home buying process and determine how we can best help you become a homeowner, you must complete all sections. **Please print clearly.**

PERSONAL INFO	*Client*	*Co-Client*
First Name, MI		
Last Name		
Mailing Address		
City, State, Zip		
Physical Street Address, Apt. #		
City, State, Zip		
How long at address?		
Home Phone		
Work Phone/Extension		
Cell Phone		
E-mail		
Race	☐ White ☐ Pacific Islander ☐ Asian ☐ African American ☐ Hispanic ☐ American Indian ☐ Other ☐ Alaska Native ☐ Hawaiian: Less than 50% Blood Quantum ☐ Hawaiian: 50% or More Blood Quantum	☐ White ☐ Pacific Islander ☐ Asian ☐ African American ☐ Hispanic ☐ American Indian ☐ Other ☐ Alaska Native ☐Hawaiian: Less than 50% Blood Quantum ☐ Hawaiian: 50% or More Blood Quantum
# Household Members (after home purchase)		
Gender	☐Male ☐Female ☐Other/Non-conforming	☐Male ☐Female ☐Other/Non-conforming
Female-Headed House?	☐Yes ☐No	☐Yes ☐No
Veteran or currently in the armed services?	☐Yes ☐No	☐Yes ☐No
Foreign Born?	☐Yes ☐No	☐Yes ☐No
Date of Birth		
Do you need special accommodations?	☐Yes ☐No If yes, type of accommodation_____	☐Yes ☐No If yes, type of accommodation_____
Education	☐ Below HS Diploma ☐ HS Diploma/Equivalent ☐ 2-Year College ☐ Bachelor Degree ☐ Master's Degree ☐ Above Master's Degree ☐ Unknown	☐ Below HS Diploma ☐ HS Diploma/Equivalent ☐ 2-Year College ☐ Bachelor Degree ☐ Master's Degree ☐ Above Master's Degree ☐ Unknown
Marital Status	☐ Single ☐ Married ☐ Divorced ☐ Separated ☐ Widowed	☐ Single ☐ Married ☐ Divorced ☐ Separated ☐ Widowed
First Time Buyer?	☐Yes ☐No	☐Yes ☐No
First Generation Buyer?	☐Yes ☐No	☐Yes ☐No

Annual Household Income (before taxes & deductions): $_____

Hawai'i HomeOwnership Center
NeighborWorks® HomeOwnership Center

All documents sent to Oahu for processing
1259 Aala St., Ste. 201, Honolulu, HI 96817
Phone: (808) 523-9500 Fax (808) 523-9502
Secure Document Submission Available: http://www.hihomeownership.org

	Client	***Co-Client***
First & Last Name		
CURRENT HOUSING ARRANGEMENT	***Client (please check)***	***Co-Client (please check if NOT living with Client)***
Maximum monthly mortgage payment you are comfortable with: **$**_____	☐Rent ($_____ per month) ☐Section 8 (max. # of bedrooms _____) ☐Homeowner ($_____ per month) ☐Currently don't pay rent or mortgage ☐Other_____	☐Rent ($_____ per month) ☐Section 8 (max. # of bedrooms _____) ☐Homeowner ($_____ per month) ☐Currently don't pay rent or mortgage ☐Other _____

Are you about to receive additional funds (i.e., tax refunds, property sales, gift, etc.)? ☐Yes ☐No

*If yes, how much? $*_____ *From where?* _____

Co-Client Relationship to Client:
☐ Spouse ☐ Sibling ☐ Parent ☐ Step Parent
☐ Legal Guardian ☐ Grandparent ☐ Step Child ☐ Grandchild
☐ No Relationship ☐ Other _____

Do you have a contract on a home at this time?	☐Yes ☐No If Yes, when do you sign?

Referred to HomeOwnership Center by (please check all that apply):
☐Print Advertisement ☐Bank/Lender ☐Government ☐REALTOR ☐Radio ☐TV
☐Staff/Board Member ☐None/Walk-in ☐Friend/Family ☐Newspaper ☐Other _____

Please provide the name of the person and/or business that made the referral: _____

CREDIT REPORT AUTHORIZATION (Not needed if you are already in contract for a home):

____I authorize the Hawai`i HomeOwnership Center to pull my /our credit report(s) or review my / our credit file(s) for housing counseling in connection with my/our pursuit on a loan to purchase real property.

A single credit report costs $37.70 and a joint credit report costs $75.40 (for married couples only).

Social security numbers are required to pull your credit report.
Name/Social Security#:_____
Name/Social Security#:_____

____I will provide a credit report.

____I am in contract and will not need to provide a credit report.

Hawai'i HomeOwnership Center
NeighborWorks® HomeOwnership Center

All documents sent to Oahu for processing
1259 Aala St., Ste. 201, Honolulu, HI 96817
Phone: (808) 523-9500 Fax (808) 523-9502
Secure Document Submission Available: http://www.hihomeownership.org

PAYMENT OPTIONS

- ☐ I am submitting a check. Check #_____ Amount_____
- ☐ Please invoice me so I can pay by credit card.
- ☐ I will pay for my membership online at http://hihomeownership.org/membership.html
- ☐ I need a payment plan for the membership fee – please contact me.
- ☐ My household income is 30% Area Median Income (AMI) or less. Please contact me for payment details.
- ☐ My payment will address:
  - ☐ Live Homebuyer education classes via Zoom - $75.00 lifetime membership fee (no refunds once any services received.

  OR
  - ☐ Self-paced education (includes lifetime membership) – $75.00 lifetime membership fee (no refunds once any services received. We will email you details on registering for the course.

  - ☐ Credit report: # reports _____ (no refunds once the report is pulled even if no services rendered)

Hawai'i HomeOwnership Center
NeighborWorks® HomeOwnership Center

All documents sent to Oahu for processing
1259 Aala St., Ste. 201, Honolulu, HI 96817
Phone: (808) 523-9500 Fax (808) 523-9502
Secure Document Submission Available: http://www.hihomeownership.org

Hawai'i HomeOwnership Center (HHOC) Disclosure Statement
BY SIGNING THIS FORM, I ACKNOWLEDGE THE FOLLOWING:

HHOC Services Offered:

Pre-purchase Coachng: Clients receive comprehensive one-on-one counseling, which covers the entire home buying process from beginning to end. Coaches assist their clients with creating a sustainable budget/spending plan for their current household situation, and a clear action plan is developed to achieve the overall goal of homeownership. Clients also receive important material on home inspection, pre-foreclosure, and any other homeownership topic relevant to successfully maintaining a home.

Non-delinquency Post-purchase Coaching: Clients receive important material on how to properly maintain a home, refinance a home, and select a realtor. Clients are assessed for individual needs and are assisted with the tools and services to successfully maintain a home.

Pre-purchase Homebuyer Education: Attendees will receive information on topics that will prepare the prospective homebuyer to make informed home purchase decisions. Topics include homebuyer readiness, money management, understanding credit, getting a mortgage loan, shopping for a home, keeping your home/managing finances, and maintaining a home.

- I understand that HHOC receives funds (including Congressional funds) through various sources (including the US Department of Housing & Urban Development), so HHOC is required to share some of my personal information with grant administrators or their agents for purposes of program monitoring, compliance and evaluation.
- I understand that HHOC provides information and education on numerous loan products and housing programs and I further understand that the HUD counseling services and guidance I receive from HHOC in no way obligates me to choose any of these particular loan products or housing programs.
- I understand that HHOC provides HUD housing counseling services that may result in an action plan that includes referrals to other agencies or lenders for services or loan products. Receiving services from HHOC in no way obligates me to choose any of the programs or products to which I am referred.
- I understand that HHOC is affiliated with a non-profit, HHOC Housing and Land Trust which may have homes for sale. I understand that I am not obligated to choose this as a vehicle to buy a home and that HHOC is not a licensed real estate broker, nor employs real estate agents with an active license.
- I understand that HHOC is affiliated with a non-profit mortgage brokerage, HHOC Mortgage. I am not obligated to obtain my home mortgage from HHOC Mortgage. I understand that HHOC recommends "shopping" for my loan with at least four (4) lenders. HHOC is not a licensed mortgage broker and none of its staff can originate mortgage products.
- I understand that as a condition of the use of our services, and in alignment to meeting our counseling goals, and in compliance with HUD's Housing Counseling Program requirements, HHOC may provide me with information on alternative service programs and products that are available, if applicable, and known by our staff. I understand I am not obligated to use the services of referral agencies to receive housing counseling services. I can find a list of HHOC donors on the HHOC website (http://www.hihomeownership.org)

Hawai'i HomeOwnership Center
NeighborWorks® HomeOwnership Center

All documents sent to Oahu for processing
1259 Aala St., Ste. 201, Honolulu, HI 96817
Phone: (808) 523-9500 Fax (808) 523-9502
Secure Document Submission Available: http://www.hihomeownership.org

- I understand that the role of the Hawaii HomeOwnership Center and its employees is to provide support, education, and resources to help me reach my homeownership goal. HHOC aims to meet the needs of all clients whenever possible. However, I understand HHOC does not guarantee that I will be able to secure a mortgage, participate in any assistance programs, or purchase a home. This information does not constitute an application for mortgage financing or mortgage insurance.
- I have received the attached Home Inspection informational sheets.

Primary Client Signature	Print Name	Date
Co-Client Signature	Print Name	Date

This disclosure was conveyed verbally via a virtual/telephonic session.

HHOC Staff Signature	Print Name	Date