

# Clinch-Powell Home Team

## *eHomeAmerica Counseling Intake Form*

Date \_\_\_\_\_

Please provide us with your basic contact information.

Client's Name \_\_\_\_\_

Co-Client's Name \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

How long at this address? \_\_\_\_\_ If less than 2 years list previous add below:

Previous address. \_\_\_\_\_

How long at this address? \_\_\_\_\_

Home Phone ( ) \_\_\_\_\_ Cell Phone ( ) \_\_\_\_\_

Client's work Phone ( ) \_\_\_\_\_ Co-Client Work Phone ( ) \_\_\_\_\_

E-mail address \_\_\_\_\_

The following information is required for Government reporting. All information provided will remain confidential. Privacy policy attached.

Date of Birth (month/day/year) \_\_\_\_\_ Co-Client's Date of Birth \_\_\_\_\_

Social Security Number \_\_\_\_\_ Co-Client's SS# \_\_\_\_\_

How did you hear about us? \_\_\_\_\_

*Please check all that apply: The following information is requested by the Federal Government for certain types of loan and for monitoring purposes. **You are not required to furnish this information, but are encouraged to do so.** The law provides that a lender cannot discriminate based on ethnicity, race, gender or marital status.*

**Race (Check all that Apply)** Black or African-American Asian Native American White Native Hawaiian or Pacific Islander Other

**Ethnicity** Hispanic Non-Hispanic

**Gender** Male Female **Co-Applicant Gender** Male Female

**Marital Status** Married Separated Divorced Widowed Never married

**Family Size (number of related adults and children living with you)** \_\_\_\_\_

Number of Dependents (younger than 18 and living with you) \_\_\_\_\_

Is either client disabled?    Yes            No

Is the Client or Co-Client an immigrant to the U.S?    Yes (Year of immigration \_\_\_\_\_)            No

Income:

Client Employment:

Income: \$ \_\_\_\_\_ per \_\_\_\_\_ (week, month, year)

Co-Client's Employment :

Income: \$ \_\_\_\_\_ per \_\_\_\_\_ (week, month, year)

Other Income

SSI or Disability: \$ \_\_\_\_\_ per month

Social Security: \$ \_\_\_\_\_ per month

Child Support: \$ \_\_\_\_\_ per month

Other: \$ \_\_\_\_\_ per month

Food Stamps \$ \_\_\_\_\_ per month (not counted as income)

---

## ASSETS

Please list a value for each of the following assets.

- a.    **Checking Account** \_\_\_\_\_
- b.    **Savings Account** \_\_\_\_\_
- c.    **Retirement Account** \_\_\_\_\_
- d.    **Cash on hand** \_\_\_\_\_

Are you about to receive additional funds (tax refunds, property sales etc)? (Circle Yes No)

    If yes, how much? \$ \_\_\_\_\_

---

## DEBTS

Have you filed Bankruptcy in the last 7 years?

    If so, When \_\_\_\_\_ Discharge Date \_\_\_\_\_

    Chapter 7 \_\_\_\_\_ or Chapter 13 \_\_\_\_\_

Do you participate in a HUD Section 8 Rental Voucher program? \_\_\_\_\_

Is this your first home?    Yes / No

## Consent to release information

I hereby authorize Clinch-Powell RC&D to, when appropriate, share information with USDA Rural Development, the Tennessee Housing Development agency or a third party lender as necessary to qualify me for a specific program.

## Conflict of Interest Disclosure

Clinch-Powell RC&D Council is a non-profit Community Housing Development Organization that helps low-to-moderate income families purchase affordable homes.

Clinch-Powell RC&D receives funding for its housing programs through grants from several sources, including but not limited to USDA Rural Housing Services, the U.S. Department of Housing and Urban Development and the Tennessee Housing Development Agency. Clinch-Powell RC&D develops affordable single-family homes to sell to low-to-moderate income families and offers low-interest loans and grants for various affordable housing activities. Lastly, Clinch-Powell RC&D serves as both a property owner and property manager for multi-family rental housing.

In providing counseling services, the RC&D housing counselor will present to their clients several options in pursuing housing, including recommendations of some of the above listed services. The RC&D housing counselor will recommend only services that are in the best interest of the client and will inform the client of any interests the organization has in any particular product or service.

As the client, you have the right to choose the product or service that you feel is right for you, regardless of any recommendation made by the counselor. Your decision to utilize or not utilize certain programs and products will not effect your housing counseling service.

I the undersigned, have been given a copy of this disclosure and understand the RC&D's policy regarding the conflict of interest policy.

---

Signature of Client

---

Date

---

Signature of Co-client

---

Date



# PRIVACY NOTICE

Clinch-Powell RC&D Council

We may collect non-public personal information about you from the following sources:

- Information that you provide to use, such as on applications or other forms;
- Information about your transaction with us or others; and
- Information from others, such as credit bureaus, real estate appraisers, lenders and employers

We do not disclose any non-public personal information about you to anyone, except:

- information provided to your lender as required to gain approval for a loan or protect your current home,
- for reporting purposes to government agencies and grantor, as outlined in the intake form and with the clear understanding that they will meet or exceed Clinch-Powell RC&D's policies in protecting your information,
- as required by law.

To maintain security of customer information, we restrict access to your personal and account information to persons who need to know that information to provide you products and services. We maintain physical, electronic and procedural safeguards that comply with federal standards to guard your non-public personal information.

If you decide to close your accounts or become an inactive customer, we will adhere to the price policies and practices as described in this notice.

If you have any questions, you can contact us at 865-828-5927