



# FHCS Foreclosure Intervention Program Client Intake Form

Please complete the information below to the best of your ability. If you do not have the information, please leave the question blank. After reviewing your completed forms, we will assist you in identifying any additional information needed.

## Contact Information

**First Name(1):** \_\_\_\_\_ **Middle Initial(1):** \_\_\_\_\_ **Last Name(1)** \_\_\_\_\_  
(1 = Primary Borrower)

**First Name(2):** \_\_\_\_\_ **Middle Initial(2):** \_\_\_\_\_ **Last Name(2)** \_\_\_\_\_  
(2 = Co-Borrower)

**Borrower Signature** \_\_\_\_\_ **Co-borrower Signature** \_\_\_\_\_

**Street Address:** \_\_\_\_\_ **Apt, P.O. #** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip Code:** \_\_\_\_\_ **County:** \_\_\_\_\_

**Home Phone:** \_\_\_\_\_ **Work Phone:** \_\_\_\_\_ **Cell Phone:** \_\_\_\_\_

**Email Address(es):** \_\_\_\_\_

## Primary Borrower's Personal Demographic Information

<b>Ethnicity/Race</b> (Check all that apply)	<b>Gender</b>	<b>Marital Status</b>
<input type="checkbox"/> American Indian or Alaskan Native	<input type="checkbox"/> Female	<input type="checkbox"/> Single
<input type="checkbox"/> Asian	<input type="checkbox"/> Male	<input type="checkbox"/> Married
<input type="checkbox"/> Black or African-American		<input type="checkbox"/> Divorced
<input type="checkbox"/> Caucasian	<b>Age:</b> _____	<input type="checkbox"/> Widowed
<input type="checkbox"/> Hispanic	<b>Date of Birth:</b> _____	
<input type="checkbox"/> Native Hawaiian or Pacific Islander	<b>Place of Birth:</b> _____	
<input type="checkbox"/> Information not provided	<b>Social Security #:</b> _____	

## Co-Borrower's Personal Demographic Information

<b>Ethnicity/Race</b> (Check all that apply)	<b>Gender</b>	<b>Marital Status</b>
<input type="checkbox"/> American Indian or Alaskan Native	<input type="checkbox"/> Female	<input type="checkbox"/> Single
<input type="checkbox"/> Asian	<input type="checkbox"/> Male	<input type="checkbox"/> Married
<input type="checkbox"/> Black or African-American	<b>Age:</b> _____	<input type="checkbox"/> Divorced
<input type="checkbox"/> Caucasian	<b>Date of Birth:</b> _____	<input type="checkbox"/> Widowed
<input type="checkbox"/> Hispanic	<b>Place of Birth:</b> _____	
<input type="checkbox"/> Native Hawaiian or Pacific Islander	<b>Social Security #:</b> _____	
<input type="checkbox"/> Information not provided	<b>Relationship to homeowner:</b> _____	

## Financial Summary

<b>Household Type</b> (Check all that apply)	<b>Gross and Net Household Family Income</b>
<input type="checkbox"/> Single Adult	<b>Yearly Gross \$</b> _____ <b>Net \$</b> _____
<input type="checkbox"/> Female-headed single parent household	<b>Monthly Gross \$</b> _____ <b>Net \$</b> _____
<input type="checkbox"/> Male-headed single parent household	<b>Family Size</b> _____
<input type="checkbox"/> Married without dependants	<b># Dependants</b> _____
<input type="checkbox"/> Married with dependants	<b>Ages of Dependants:</b> _____
<input type="checkbox"/> Two or more unrelated adults	<b>Any dependants disabled?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> U.S. Veteran	
<input type="checkbox"/> Someone in household is over the age of 62	
<input type="checkbox"/> Other	

**PLEASE SEE REVERSE SIDE FOR ADDITIONAL INFORMATION**

## Employment

### Primary Borrower:

Employer: \_\_\_\_\_ Title: \_\_\_\_\_ Self Employed  Yes  No  
Phone: \_\_\_\_\_ Net Monthly Income: \$ \_\_\_\_\_ Years in profession: \_\_\_\_\_ Hire date: \_\_\_\_/\_\_\_\_/\_\_\_\_

### Co- Borrower:

Employer: \_\_\_\_\_ Title: \_\_\_\_\_ Self Employed  Yes  No  
Phone: \_\_\_\_\_ Net Monthly Income: \$ \_\_\_\_\_ Years in profession: \_\_\_\_\_ Hire date: \_\_\_\_/\_\_\_\_/\_\_\_\_

## Mortgage Information

Name of Original Lender \_\_\_\_\_

Original Loan Number \_\_\_\_\_

Current Total Monthly Payment \_\_\_\_\_

(PITIA: Principal, Interest, Taxes, Insurance, Association Fees)

First Mortgage Total Amount Delinquent \$ \_\_\_\_\_

First Mortgage Balance Remaining \$ \_\_\_\_\_

Name of Current Lender/Service \_\_\_\_\_

Loan # assigned by Current Service \_\_\_\_\_

If current loan is an ARM (Adjustable Rate Mortgage), has the interest rate reset? Y \_\_\_\_\_ N \_\_\_\_\_

Have you received a foreclosure notice?

Yes  No

What is your "best estimate" of your home's present value? \_\_\_\_\_

How long have you owned your house? \_\_\_\_\_ years.

Is your loan owned or securitized by: Fannie Mae?\* yes \_\_\_ no \_\_\_ Freddie Mac?\* yes \_\_\_ no \_\_\_

\*To find out if your loan is owned or securitized by Freddie Mac or Fannie Mae, contact your lender at the customer service number found on your mortgage statement or go to: [www.freddie.com/avoidforeclosure](http://www.freddie.com/avoidforeclosure) or call 1-800-FREDDIE. For Fannie Mae go to [www.fanniemae.com/homeaffordable](http://www.fanniemae.com/homeaffordable) or call 1-800-7FANNIE. **Please check!**

### Type of First Loan Product at Intake

- Fixed less than 8%
- Fixed 8% or more than 8%
- ARM less than 8%
- ARM 8% or more than 8%
- Hybrid ARM (2/28 or 3/27)
- Option ARM
- Other: \_\_\_\_\_
- Unknown

### Current Loan Status

- Current
- 30-60 days late
- 61-90 days late
- 91-120 days late
- 120 + days late
- Unknown

### Primary Reason for Default (Check ONLY one)

- Reduction In Income
- Poor Budget/Management skills
- Loss Of Income
- Medical Issues
- Increase in Expenses
- Divorce/ Separation
- Death of Family Member
- Failed Business Venture

For more information on the President's Refinance/Modification Home Affordability Program go to [www.financialstability.gov](http://www.financialstability.gov). For information about the Ohio Hardest-Hit Fund, visit [www.savethedream.ohio.gov](http://www.savethedream.ohio.gov).