



Neighborhood Housing Services of Green Bay, Inc. d/b/a NeighborWorks® Green Bay
Program Intake Form

Return Completed Form to:

www.nwgreenbay.org

NeighborWorks® Green Bay

437 S. Jackson St.

Green Bay, WI 54301

Ph: 920-448-3075

Fax: 920-448-3078

Today's Date: _____

(info@nwgreenbay.org)

Part 1: Household Information

_____ Name	M / F	_____ Social Security Number	_____ Date of Birth
_____ Co-Applicant	M / F	_____ Social Security Number	_____ Date of Birth
_____ Current Address		_____ City/State	_____ Zip Code
(_____) _____ Home Telephone	(_____) _____ Mobile Phone	(_____) _____ Other Telephone	
_____ Email			

Part 2: Tracking Services

How did you hear about NeighborWorks® Green Bay?

Are you or anyone in your household disabled?

Have you owned a home in the last three years?

Do you currently reside in Brown County?

If other than Brown County, what county do you reside in:

Are you currently getting rental assistance (Section 8)?

Have you been pre-approved?

Do you currently rent or own?

If rent, how much is your current rent?

If own, how much is your current mortgage payment?

Yes No

Yes No

Yes No

Yes No

Yes No

Rent Own Not Renting

Monthly Rent: _____

Monthly Payment: _____

Part 3: Loan Information

Do you currently have an offer on a property? Yes No

If Yes, what is the Property Address: _____ Closing Date: _____

Lender (Company): _____ Lender (Name): _____ Phone or Email: _____

Realtor (Company): _____ Realtor (Name): _____ Phone or Email: _____

Information for government monitoring purposes:

Applicant:

Race (Circle One):

White Black Asian/Pacific Islander American Indian/Alaska Native
Other

Ethnicity (Circle One): Hispanic Not Hispanic

Foreign Born (Circle One): Yes No

Veteran (Circle One): Yes No

Marital Status (Circle One):

Divorced Married Separated Single Other Widowed

Education (Circle One):

Unknown Below HS Diploma HS or Equal 2 years College Bachelor
Master Above Masters

Co-Applicant:

Race (Circle One):

White Black Asian/Pacific Islander American Indian/Alaska Native
Other

Ethnicity (Circle One): Hispanic Not Hispanic

Foreign Born (Circle One): Yes No

Veteran (Circle One): Yes No

Marital Status (Circle One):

Divorced Married Separated Single Other Widowed

Education (Circle One):

Unknown Below HS Diploma HS or Equal 2 years College Bachelor
Master Above Masters

Part 4: Other Household Member Information

List information for all other household members residing at the same residence:

<u>Last Name</u>	<u>First Name</u>	<u>Date of Birth</u>	<u>Disabled</u>	<u>Relationship</u>
_____	_____	_____	Yes / No	_____
_____	_____	_____	Yes / No	_____
_____	_____	_____	Yes / No	_____
_____	_____	_____	Yes / No	_____
_____	_____	_____	Yes / No	_____
_____	_____	_____	Yes / No	_____
_____	_____	_____	Yes / No	_____
_____	_____	_____	Yes / No	_____

Total Number People Household (applicants plus other household member) = _____

Part 5: Household Income

Applicant's Annual Income:	\$ _____	Employer/Source _____	Date of Hire: _____
Co-Applicant's Annual Income:	\$ _____	Employer/Source: _____	Date of Hire: _____
Other Household Member Income:	\$ _____	Employer/Source: _____	Date of Hire: _____
Other Income:	\$ _____	Employer/Source: _____	
Total Income:	\$ _____		

Part 6: Counselor Notes



Part 7: Authorization for NeighborWorks® Green Bay To Verify Information

I/We verify that the information on this application is true and complete to the best of my knowledge and belief. I consent to the release of such information in order to qualify for NeighborWorks® Green Bay Program(s). I understand that providing false information or providing false statements may be grounds for denial of my application. I agree to provide verification of all income and assets as required by NeighborWorks® Green Bay. I further authorize disclosure of all information that will verify my income and assets. Furthermore, I agree to complete the assigned budget worksheet.

I/We authorize the release of information requested by NeighborWorks® Green Bay in order to verify our eligibility for assistance and/or any other services offered by NeighborWorks® Green Bay. This information may include inquiries about credit history, rental history, employment, income, pensions, assets, federal, state or local benefits, family composition, social security, residence history, etc.

I/We further grant permission to NeighborWorks® Green Bay to contact social services, financial institutions, landlords, employers, credit bureaus, courts, realtors, and other sources of information in order to facilitate our participation in services or programs available through NeighborWorks® Green Bay.

I/We further authorize the sharing of information, including but not limited to such documents as the Offer to Purchase, Loan Application, Third-Party Home Inspection and Appraisal, Verification of Human Services, Verification of Disability, with social service agencies, financial institutions, real estate professionals, courts and attorneys and other agencies as listed in this application.

I/We am/are aware that a home inspection completed by a certified home inspector is required and will be reviewed by NeighborWorks® Green Bay to receive funds for Down Payment & Closing Cost Assistance. Defective and/or non-compliant code areas noted in the inspection must be addressed.

We understand that NeighborWorks® Green Bay may charge fees for its programs as follows:

- Down Payment & Closing Cost Loans: NRC \$600.00, HOME \$N/C, FHLB \$600.00
- Counseling Only for Down Payment Plus (DPP): \$600.00 (Homebuyer Education Certificate provided to lender)
\$650.00 when using E-Home (net closing invoice of \$551.00)
- Counseling Only for Movin' Out: \$150 (Homebuyer Education Certificate provided to Movin' Out only)
- Counseling Only for Other: \$100.00 (Homebuyer Education Certificate provided to lender)
- Employer Assisted Homeownership (EAH): \$250.00
- E-Home Online Homebuyer Education: \$99 Registration fee

NeighborWorks® Green Bay is committed to assuring the privacy of individuals and/or families who have contacted us for assistance. We assure you that all information shared both orally and in writing will be managed within legal and ethical considerations. We may use aggregated case file information for the purpose of evaluating our services, gathering valuable research information and designing future programs.

I/We agree that photocopies of this authorization may be used for the purposes stated above.

Applicant's Signature

Co-Applicant's Signature

Date

Date



CLIENT'S AUTHORIZATION FORM

I/We hereby authorize NeighborWorks® Green Bay, to discuss pertinent information relating to credit history, past and present employment earning records, bank accounts, stock holdings, social security disability and benefits, and any other related assets that are needed to receive homeownership counseling. I/We further authorize NeighborWorks® Green Bay to receive and/or know any documents and/or actions relating to our file. In addition, NeighborWorks® Green Bay may, at it's sole discretion, obtain a Credit Bureau Report to verify information submitted to help ascertain eligibility to receive Down Payment & Closing Cost Assistance. It is understood that a photocopy of this form will also serve as authorization.

The information the agency obtains is only to be used in the homeownership program.

Client

Date

Client

Date

NEIGHBORWORKS GREEN BAY CLIENT CONTACT PERMISSION FORM

NeighborWorks® Green Bay welcomes the opportunity to have helped you learn about the process of purchasing a home through its homebuyer education program. We would like to stay in contact with you to continue sharing information about homeownership, community events, NeighborWorks® Green Bay news, etc. Please indicate that you would be willing to be on our email distribution list by completing the following information. If you would rather not be on our distribution list, just check the box to the right.

Opt Out:

☐

I hereby give NeighborWorks® Green Bay permission to send me the NeighborWorks® Green Bay and upcoming event notices via email.

Print Name

Email Address



Pre-Purchase Agency Disclosure Form

NOTE: *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 talk to your housing counselor about arranging alternative accommodations.*

NeighborWorks® Green Bay is a nonprofit, HUD-approved comprehensive housing counseling agency. We provide free education workshops and a full spectrum of housing counseling including pre-purchase homebuyer education, pre-purchase counseling, down payment and closing costs loans, foreclosure prevention, and post-purchase counseling. We serve all clients regardless of income, race, color, religion/creed, sex, national origin, age, family status, disability, or sexual orientation/gender identity. We administer our programs in conformity with local, state, and federal anti-discrimination laws, including the Federal Fair Housing Act (42 USC 3600, et seq.). As a housing counseling program participant, please affirm your roles and responsibilities along with the following disclosures and initial, sign, and date the form on the following page.

Counselor's Roles and Responsibilities:

1. Reviewing your housing goal and your finances; which include your income, debts, assets and credit history.
2. Preparing a Client Action Plan that lists the steps that you and your counselor will take in order to achieve your housing goal.
3. Review a household budget that will help you manage your debts, expenses and savings.
4. Your counselor is not responsible for achieving your housing goal, but will provide guidance and education in support of your goal.
5. Neither your counselor nor NeighborWorks® Green Bay employees, agents, or directors may provide legal advice.

Client's Roles and Responsibilities:

1. Completing the steps assigned to you in your Client Action Plan.
2. Providing accurate information about your income, debts, expenses, credit and employment.
3. Attending meetings, returning calls, providing requested paperwork in a timely manner.
4. Notifying NeighborWorks® Green Bay or your counselor when changing a housing goal.
5. Attending Class 1 and Class 2 of Homebuyer Education.
6. Retain an attorney if seeking legal advice and/or representation in matters such as foreclosure or bankruptcy protection.
7. I/We, the client(s), understand that failure to work cooperatively with my housing counselor and/or NeighborWorks® Green Bay will result in the discontinuation of counseling services. This includes, but not limited to, missing phone or in person appointments.

As a housing counseling program participant, you are not obligated to receive, purchase or utilize any other products and services of NeighborWorks® Green Bay, including but not limited to renting property or purchasing real estate owned by NeighborWorks® Green Bay, or our industry partners in order to receive housing counseling services.

Alternative Services, Programs, and Products & Client Freedom of Choice: You are entitled to choose whatever real estate professionals, lenders, and lending products that best meet your needs.

Referrals and Community Resources: A community resource list is available online via the UW Extension – Brown County Community Resource Guide. Additional resources can be found through Brown County United Way 2-1-1 program.

Privacy Policy: NeighborWorks® Green Bay is committed to assuring the privacy of individuals and/or families who have contacted us for assistance. We realize that the concerns you bring to us are highly personal in nature. We assure you that all information shared both orally and in writing will be managed within legal and ethical considerations. Your “nonpublic personal information,” such as your total debt information, income, living expenses and personal information concerning your financial circumstances, will be provided to creditors, program monitors, and others only with your authorization and signature on the Program Intake Form. We may also use anonymous aggregated case file information for the purpose of evaluating our services, gathering valuable research information and designing future programs.

Types of information that we gather about you:

- Information we receive from you orally, on applications or other forms, such as your name, address, social security number, assets, and income;
- Information about your transactions with us, your creditors, or others, such as your account balance, payment history, parties to transactions and credit card usage; and
- Information we receive from a credit reporting agency, such as your credit history.

Release of your information to third parties:

- We may also disclose any nonpublic personal information about you or former customers to anyone as permitted by law (e.g., if we are compelled by legal process).
- Within the organization, we restrict access to nonpublic personal information about you only to those employees who need to know that information to provide services to you.

Errors and Omissions and Disclaimer of Liability: I/We agree NeighborWorks® Green Bay, its employees, agents, and directors are not liable for any claims and causes of action arising from errors or omissions by such parties, or related to my participation in NeighborWorks® Green Bay counseling; and I/we hereby release and waive all claims of action against NeighborWorks® Green Bay. I/We have read this document, understand that I/we have given up substantial rights by signing it, and have signed it freely and without any inducement or assurance of any nature and intend it to be a complete and unconditional release of all liability to the greatest extent allowed by law. If any provision of this document is unenforceable, it shall be modified to the extent necessary to make the provision valid and binding, and the remainder of this document shall remain enforceable to the full extent allowed by law.

Quality Assurance: In order to assess client satisfaction and in compliance with grant funding requirements, NeighborWorks® Green Bay, or one of its partners, may contact you during or after the completion of your housing counseling service. You may be requested to complete a survey asking you to evaluate your client experience. Your survey data may be confidentially shared with NeighborWorks® Green Bay grantors such as HUD or NeighborWorks America.

I/We acknowledge that I/we received, reviewed, and agree to NeighborWorks® Green Bay Pre-Purchase Agency Disclosures.

Client

Date

Client

Date

CAUTION

U.S. Department of Housing
and Urban Development
Federal Housing Administration (FHA)



OMB Approved No: 2502-0538
(exp. 07/01/2009)

For Your Protection: Get a Home Inspection

CAUTION

Why a Buyer Needs a Home Inspection

A home inspection gives the buyer more detailed information about the overall condition of the home prior to purchase. In a home inspection, a qualified inspector takes an in-depth, unbiased look at your potential new home to:

- ✓ Evaluate the physical condition: structure, construction, and mechanical systems;
- ✓ Identify items that need to be repaired or replaced; and
- ✓ Estimate the remaining useful life of the major systems, equipment, structure, and finishes.

Appraisals are Different from Home Inspections

An appraisal is different from a home inspection. Appraisals are for lenders; home inspections are for buyers. An appraisal is required to:

- ✓ Estimate the market value of a house;
- ✓ Make sure that the house meets FHA minimum property standards/requirements; and
- ✓ Make sure that the property is marketable.

FHA Does Not Guarantee the Value or Condition of your Potential New Home

If you find problems with your new home after closing, FHA can not give or lend you money for repairs, and FHA can not buy the home back from you. That is why it is so important for you, the buyer, to get an independent home inspection. Ask a qualified home inspector to inspect your potential new home and give you the information you need to make a wise decision.

Radon Gas Testing

The United States Environmental Protection Agency and the Surgeon General of the United States have recommended that all houses should be tested for radon. For more information on radon testing, call the toll-free National Radon Information Line at 1-800-SOS-Radon or 1-800-767-7236. As with a home inspection, if you decide to test for radon, you may do so before signing your contract, or you may do so after signing the contract as long as your contract states the sale of the home depends on your satisfaction with the results of the radon test.

Be an Informed Buyer

It is your responsibility to be an informed buyer. Be sure that what you buy is satisfactory in every respect. You have the right to carefully examine your potential new home with a qualified home inspector. You may arrange to do so before signing your contract, or may do so after signing the contract as long as your contract states that the sale of the home depends on the inspection.

CAUTION





HUD-92564-CN (5/06)



CAUTION

CLIENT RECEIPT

I/We understand the importance of getting an independent home inspection. I/We have considered this before signing a contract with a seller for a home. Furthermore, I/we have carefully read this notice and fully understand that FHA will not perform a home inspection nor guarantee the price or condition of the property.

Client

Date

Client

Date

PLEASE REMOVE THIS PAGE FROM THE PROGRAM INTAKE
PACKET and KEEP

CAUTION

U.S. Department of Housing
and Urban Development
Federal Housing Administration (FHA)



OMB Approval No: 2502-0538
(exp. 07/21/2009)

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CAUTION