

Customer Intake



Applicant Information

Name: _____
Last Name First Name M.I.

Address: _____
Street Address Apartment/Unit #

City State Zip Code

Phone: _____ Email: _____

Date of Birth: ____ / ____ / _____ Gender: _____

Preferred Contact Type: _____

Have you owned a home in the last 3 years?

First-Generation Homebuyer?

Are you Head of Household?

Are you foreign born?

Are you a Veteran?

Are you active military?

Are you disabled?

Is your dependent disabled?

Do you live in a rural area?

Are you Hispanic?

Race (check all that apply)

- American Indian/Alaskan Native
- Asian
- Black/African American
- Native Hawaiian/Pacific Islander
- Other/Multi-racial
- White
- Prefer not to answer

Preferred Language: _____

Marital Status: _____

Highest Level of Education: _____

How did you hear about NeighborWorks® Sacramento?

Please Upload a copy of your valid photo-identification:

Customer Intake



Applicant Information: Income

Please upload a document or documents showing your income for each income type that applies to you. If you are reporting employment income, we need both your paystubs AND W-2's.

Income Type	Types of Documents we Accept	Document 1	Document 2	Document 3
Employment Income: Paystubs	Paystub from employer from the last 3 months			
Employment Income: W-2s	W-2's from the last 3 years			
Self-Employment	Form 1099 from the last 2 years; Profit & Loss Statement for the last 2 years			
Unemployment	Unemployment Letter			
Disability	Disability Letter			
Alimony/Child Support	Alimony or Child Support Letter			
SSI	SSI Benefits Letter			
AFDC/Public Assistance	Public Assistance Letter			
Pension Income	Pension Letter or Statement			
Seasonal Employment	Documentation that shows the amount of income and evidence that this income is reliable every year. May include: paystubs, 1099, letter from employer, etc.			
VA	Summary of Benefits Letter			

Customer Intake



Applicant Information: Assets

Please upload a document or documents to verify your assets. Your bank statements and tax returns are required. Only upload documentation for the other Asset types if they apply to you. If you are applying with a co-applicant, and you hold assets jointly, you only need to upload documentation of that asset once.

Asset Documentation	Document 1	Document 2	Document 3
Savings Account Bank Statements for the last 3 months			
Checking Account Bank Statements for the last 3 months			
Tax Returns for the last 3 years			
Statement from 401k, pension, or retirement account			
CD Account Statements			
Redeemable Life Insurance Account(s)			
Keogh Account(s)			
Money Market or Stock Funds			
Assets or Investments owned in partnership with others			
Other Asset			
Seasonal Employment			

Customer Intake



Household Information

Household Type:

List every member of your household. A household member is anyone currently living with you who will keep living with you if you move into a new home (usually family members). If any household member is age 18 or older, we need their income documentation even if they are not a co-applicant.

Name	Relationship	Age	If they are 18 or older, do they earn an income?

Customer Intake



Income documentation for non-applicants who are members of the household AND age 18 or older.

Income Type	Types of Documents we Accept	Document 1	Document 2	Document 3
Employment Income: Paystubs	Paystub from employer from the last 3 months			
Employment Income: W-2s	W-2's from the last 3 years			
Self-Employment	Form 1099 from the last 2 years; Profit & Loss Statement for the last 2 years			
Unemployment	Unemployment Letter			
Disability	Disability Letter			
Alimony/Child Support	Alimony or Child Support Letter			
SSI	SSI Benefits Letter			
AFDC/Public Assistance	Public Assistance Letter			
Pension Income	Pension Letter or Statement			
Seasonal Employment	Documentation that shows the amount of income and evidence that this income is reliable every year. May include: paystubs, 1099, letter from employer, etc.			
VA	Summary of Benefits Letter			

Customer Intake



Asset documentation for non-applicants who are members of the household AND age 18 or older.

Asset Documentation	Document 1	Document 2	Document 3
Savings Account Bank Statements for the last 3 months			
Checking Account Bank Statements for the last 3 months			
Tax Returns for the last 3 years			
Statement from 401k, pension, or retirement account			
CD Account Statements			
Redeemable Life Insurance Account(s)			
Keogh Account(s)			
Money Market or Stock Funds			
Assets or Investments owned in partnership with others			
Other Asset			
Seasonal Employment			

Customer Intake



Disclosures

NeighborWorks® Sacramento Region values your privacy. We collect the following information: information we receive from your application and other forms, information about your transactions with us, our affiliates or others, and information we receive from a consumer reporting agency. Our agency takes every precaution to keep your information confidential and secure per industry standards. NeighborWorks® Sacramento Region may not use or disclose the information provided by you without written consent except under the following circumstances: as necessary to provide the services you request, as required by law or in response to a subpoena or search warrant, or to outside auditors such as HUD or NeighborWorks® America who have agreed to keep the information confidential.

Applicant Signature

Date

Co-Applicant Signature

Date