



# DELAWARE OPPORTUNITIES INC.

35430 STATE HIGHWAY 10, HAMDEN, NY 13782

PHONE (607) 746-1600 • FAX (607) 746-1605

email: [info@delop.org](mailto:info@delop.org)

website: [www.delawareopportunities.org](http://www.delawareopportunities.org)

SERVING  
DELAWARE COUNTY

HEAD START  
DEVELOPMENTAL DISABILITIES

BIG BUDDY

PARENT EDUCATION

DAY CARE

RESOURCE/REFERRAL

(Registration)

(Subsidies)

(USDA Sponsor)

(Inspections)

HEALTHY FAMILIES

SENIOR DINING

SAFE AGAINST VIOLENCE

(Domestic Violence)

(Rape Crisis)

(Office of Victim Services)

JOBS WORK CREW

WORK IN PROGRESS

EMPLOYMENT AND TRAINING

COMMUNITY FOOD AND NUTRITION

WEATHERIZATION

(Serving both Delaware and

Sullivan Counties)

HOUSING ASSISTANCE AND  
COMMUNITY DEVELOPMENT

(Housing Development)

(Homeownership/Tenant Counseling)

(Rental Assistance)

(Housing Rehabilitation)

HEAP

FAMILY DEVELOPMENT

FAMILY RESIDENCES

INDEPENDENT LIVING SKILLS

WIC

(Women, Infants and Children)

(Car Seat Safety)

FOOD BANK SERVICES AND  
CLOTHING/HOUSEHOLD GOODS

EMERGENCY FOOD  
AND SHELTER

HOMELESS ASSISTANCE

TRANSPORTATION

Please return this First time Homeowners

Application and all documents to:

Delaware Opportunities Inc.

Housing Office

35430 State Hwy 10

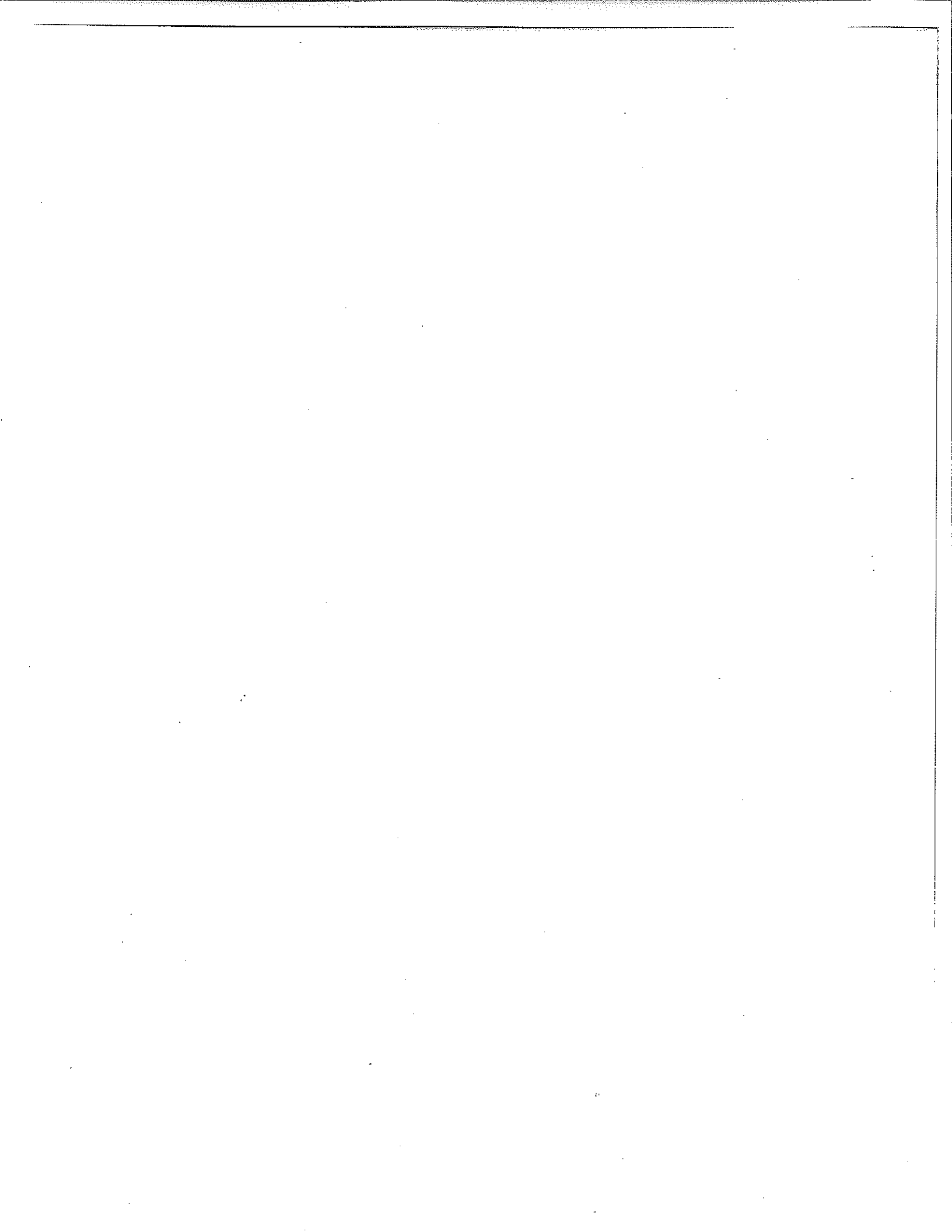
Hamden, NY 13782

607-746-1650

607-746-1648 fax

- Social security cards for all household members.
- Verification of income for the past month.
- Copies of the past two years federal income tax returns.
- Copy of your credit report. Obtain free once a year at [www.annualcreditreport.com](http://www.annualcreditreport.com).

*"Helping people become self-sufficient and attain a better quality of life." since 1965*



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## Personal Information Client Intake 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.*

How did you hear about our housing counseling agency?

- |  |  |   |  |
|--|--|---|--|
| <input type="checkbox"/> Member of our staff | <input type="checkbox"/> Print/radio ad            | <input type="checkbox"/> Religious or social organization | <input type="checkbox"/> Friend/family         |
| <input type="checkbox"/> HUD                 | <input type="checkbox"/> Bank or mortgage servicer | <input type="checkbox"/> Internet search                  | <input type="checkbox"/> Other (specify) _____ |

### Part One. Your Biographic and Demographic Information

|   |  |                         |                       |  |
|---|--|-------------------------|-----------------------|--|
| <b>Name 1:</b>  | <b>Date:</b>   |                         |                       |  |
| <table border="0" style="width: 100%; font-size: small;"> <tr> <td style="width: 33%; text-align: center;"><i>Last Name</i></td> <td style="width: 33%; text-align: center;"><i>First Name</i></td> <td style="width: 33%; text-align: center;"><i>Middle Initial</i></td> </tr> </table>   | <i>Last Name</i>   | <i>First Name</i>       | <i>Middle Initial</i> |  |
| <i>Last Name</i>  | <i>First Name</i>  | <i>Middle Initial</i>   |                       |  |
| <b>Address:</b>   | <b>Home Phone:</b>   |                         |                       |  |
| <table border="0" style="width: 100%; font-size: small;"> <tr> <td style="width: 40%; text-align: center;"><i>Address and Apartment No</i></td> <td style="width: 30%; text-align: center;"><i>City &amp; State</i></td> <td style="width: 30%; text-align: center;"><i>Zip</i></td> </tr> </table>   | <i>Address and Apartment No</i>  | <i>City &amp; State</i> | <i>Zip</i>            |  |
| <i>Address and Apartment No</i>   | <i>City &amp; State</i>  | <i>Zip</i>              |                       |  |
| <b>Email Address:</b>   | <b>Cell Phone:</b> (    ) -  |                         |                       |  |
| <input type="checkbox"/> Work Email <input type="checkbox"/> Personal Email   | <b>Gender:</b> <input type="checkbox"/> Male <input type="checkbox"/> Female |                         |                       |  |
| <b>Preferred Contact Method:</b>  | <b>Best time to be reached:</b>  |                         |                       |  |
| <input type="checkbox"/> Cell Phone <input type="checkbox"/> Work Phone <input type="checkbox"/> Home Phone <input type="checkbox"/> Email  |  |                         |                       |  |
| <b>Social Security #</b>  | <b>Date of Birth:</b>  |                         |                       |  |
|   |  |                         |                       |  |
| <b>Race:</b>  | <b>Ethnicity:</b>  |                         |                       |  |
| <input type="checkbox"/> American Indian/Alaskan Native <input type="checkbox"/> Asian <input type="checkbox"/> African-American<br><input type="checkbox"/> Native Hawaiian/Pacific Islander <input type="checkbox"/> White <input type="checkbox"/> Biracial or Multiracial<br><input type="checkbox"/> Other (Specify) _____    Decline to Answer <input type="checkbox"/> | <input type="checkbox"/> Hispanic <input type="checkbox"/> Non-Hispanic      |                         |                       |  |
| <b>Marital Status:</b>  | <b>Are you a Veteran?</b>  |                         |                       |  |
| <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Widow  | <input type="checkbox"/> Yes <input type="checkbox"/> No                     |                         |                       |  |
|   | <b>Are you Disabled?</b>   |                         |                       |  |
|   | <input type="checkbox"/> Yes <input type="checkbox"/> No                     |                         |                       |  |

|   |  |                         |                       |  |
|---|--|-------------------------|-----------------------|--|
| <b>Name 2:</b>  | <b>Date:</b>   |                         |                       |  |
| <table border="0" style="width: 100%; font-size: small;"> <tr> <td style="width: 33%; text-align: center;"><i>Last Name</i></td> <td style="width: 33%; text-align: center;"><i>First Name</i></td> <td style="width: 33%; text-align: center;"><i>Middle Initial</i></td> </tr> </table>           | <i>Last Name</i>   | <i>First Name</i>       | <i>Middle Initial</i> |  |
| <i>Last Name</i>  | <i>First Name</i>  | <i>Middle Initial</i>   |                       |  |
| <b>Address:</b>   | <b>Home Phone:</b>   |                         |                       |  |
| <table border="0" style="width: 100%; font-size: small;"> <tr> <td style="width: 40%; text-align: center;"><i>Address and Apartment No</i></td> <td style="width: 30%; text-align: center;"><i>City &amp; State</i></td> <td style="width: 30%; text-align: center;"><i>Zip</i></td> </tr> </table> | <i>Address and Apartment No</i>  | <i>City &amp; State</i> | <i>Zip</i>            |  |
| <i>Address and Apartment No</i>   | <i>City &amp; State</i>  | <i>Zip</i>              |                       |  |
| <b>Email Address:</b>   | <b>Cell Phone:</b> (    ) -  |                         |                       |  |
| <input type="checkbox"/> Work Email <input type="checkbox"/> Personal Email   | <b>Gender:</b> <input type="checkbox"/> Male <input type="checkbox"/> Female |                         |                       |  |
| <b>Relationship to Co-Applicant:</b>  | <b>Best time to be reached:</b>  |                         |                       |  |
| <input type="checkbox"/> Spouse <input type="checkbox"/> Significant Other <input type="checkbox"/> Relative (specify): _____    Other: _____   |  |                         |                       |  |
| <b>Preferred Contact Method:</b>  | <b>Date of Birth:</b>  |                         |                       |  |
| <input type="checkbox"/> Cell Phone <input type="checkbox"/> Work Phone <input type="checkbox"/> Home Phone <input type="checkbox"/> Email  |  |                         |                       |  |
| <b>Social Security #</b>  | <b>Ethnicity:</b>  |                         |                       |  |
|   | <input type="checkbox"/> Hispanic <input type="checkbox"/> Non-Hispanic      |                         |                       |  |
| <b>Marital Status:</b>  | <b>Are you a Veteran?</b>  |                         |                       |  |
| <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Widow  | <input type="checkbox"/> Yes <input type="checkbox"/> No                     |                         |                       |  |
|   | <b>Are you Disabled?</b>   |                         |                       |  |
|   | <input type="checkbox"/> Yes <input type="checkbox"/> No                     |                         |                       |  |

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**My household type is....**

- Single Adult
  - Married
  - Cohabiting
  - Single female-headed household with dependents
  - Single male-headed household with dependents
  - Roommates/ unrelated adults
  - Living with non-spousal family members (parents, siblings, etc)
  - Other: (specify) \_\_\_\_\_
- Family household size: \_\_\_\_\_ Languages Spoken (specify): \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

**Part Two. Your Employment Status**

**Name 1's Employment Status**

- Employed Full-time
- Employed Part-Time
- Employed Seasonally
- Unemployed, receiving benefits
- Unemployed, receiving no benefits
- Self-Employed
- Disabled, receiving benefits
- Retired
- Other (specify): \_\_\_\_\_

**Name 1**  
**Employer:** \_\_\_\_\_  
**Address:** \_\_\_\_\_  
*Address City & State Zip*

**Dates**  
**of Employment:** \_\_\_\_\_ to \_\_\_\_\_  
**Work Phone:** \_\_\_\_\_

**Previous**  
**Employer:** \_\_\_\_\_  
**Address:** \_\_\_\_\_  
*Address City & State Zip*

**Dates**  
**of Employment:** \_\_\_\_\_ to \_\_\_\_\_  
**Work Phone:** \_\_\_\_\_

**Name 2's Employment Status**

- Employed Full-time
- Employed Part-Time
- Employed Seasonally
- Unemployed, receiving benefits
- Unemployed, receiving no benefits
- Self-employed
- Disabled, receiving benefits
- Retired
- Other (specify): \_\_\_\_\_

**Name 2**  
**Employer:** \_\_\_\_\_  
**Address:** \_\_\_\_\_  
*Address City & State Zip*

**Dates**  
**of Employment:** \_\_\_\_\_ to \_\_\_\_\_  
**Work Phone:** \_\_\_\_\_

**Previous**  
**Employer:** \_\_\_\_\_  
**Address:** \_\_\_\_\_  
*Address City & State Zip*

**Dates**  
**of Employment:** \_\_\_\_\_ to \_\_\_\_\_  
**Work Phone:** \_\_\_\_\_

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**Part Three. Your Housing Status and Housing Goals**

**My current housing status is:**

- Renting/leasing       Homeowner with mortgage(s)       Homeowner (no mortgage debt)  
 Homeless       Boarder (renting)       Living with family (renting/not renting)  
 Other: \_\_\_\_\_ Do you currently receive rental assistance subsidies?  Yes  No If yes, please specify: \_\_\_\_\_

**My housing goal is to...check all that apply:**

- Buy a home (pre-purchase counseling)       Prevent foreclosure       Obtaining rental housing  
 Transition from homelessness       Obtain a reverse mortgage       Get credit and budget counseling  
 Discuss a fair housing rights violation       [Other Service Provided by HCA]       [Other Service Provided by HCA]

**Part Four. Your Rental and Mortgage Information**

If you are currently renting, how long have you been renting?      Years      Months. Check all that apply:

|   |  |   |
|---|--|---|
| <input type="checkbox"/> I pay market rent  | <input type="checkbox"/> I receive a rent subsidy and/or public housing resident | <input type="checkbox"/> I am a Section 8 recipient                         |
| <input type="checkbox"/> I am facing eviction   | <input type="checkbox"/> I am delinquent with my rent and need assistance        | <input type="checkbox"/> I am delinquent with utilities and need assistance |
| <input type="checkbox"/> I am interested in filing a fair housing claim. Specify reason(s): |  |   |

If you own your property, do you have a mortgage?  YES  NO. If YES, please answer the questions below.

| My mortgage data  |   |   |
|---|---|---|
|   | First Mortgage  | Second Mortgage   |
| Is this loan Current or Delinquent?   | <input type="checkbox"/> Current <input type="checkbox"/> Delinquent  | <input type="checkbox"/> Current <input type="checkbox"/> Delinquent                                    |
| Mortgage servicer name  |   |   |
| Loan Number   | <input type="checkbox"/> I don't know   | <input type="checkbox"/> I don't know   |
| Loan Balance  | \$ <input type="checkbox"/> I don't know  | \$ <input type="checkbox"/> I don't know  |
| Interest Rate   | <input type="checkbox"/> I don't know   | <input type="checkbox"/> I don't know   |
| Monthly Principal and Interest Payment (excluding taxes and insurance).                                     |   |   |
| Private Mortgage Insurance (PMI) payment  | \$  | \$  |
| Fixed or Adjusting Interest Rate?   | <input type="checkbox"/> Fixed <input type="checkbox"/> Adjusting <input type="checkbox"/> I don't know   | <input type="checkbox"/> Fixed <input type="checkbox"/> Adjusting <input type="checkbox"/> I don't know |
| Date you made your last payment:  | / /   | / /   |
| Past Due Amount:  | \$  | \$  |
| Have you previously applied for a loan modification or forbearance?   | <input type="checkbox"/> Yes <input type="checkbox"/> No  | <input type="checkbox"/> Yes <input type="checkbox"/> No  |
| If "yes," please provide details on the outcome of your previous foreclosure prevention effort here:      ➡ |   |   |
| Reason for Default:   | <input type="checkbox"/> Divorce <input type="checkbox"/> Disability <input type="checkbox"/> Marital Separation <input type="checkbox"/> Decrease in income <input type="checkbox"/> Increase in expenses <input type="checkbox"/> Medical Hardship <input type="checkbox"/> Other |   |

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Please provide additional remarks about your hardship here:

Has your hardship ended?

Yes  No

Do you have the ability and willingness to resume mortgage payments?  Yes  No

If "No," you seeking an alternative outcome, such as a deed-in lieu of foreclosure or short sale? Explain.

**Questions related to your credit history:**

1. Are there any outstanding judgments against you?  Yes  No

2. Have you declared bankruptcy within the past seven years?  Yes  No  I am currently in a bankruptcy plan.

3. Within the past seven years, have you had a property foreclosed or surrendered through a deed-in-lieu?  Yes  No

**Part Five. Your Income, Debt, and Average Monthly Expenses**

Please provide information regarding your income and household debts and expenses below. Remember, every number should represent a monthly calculation (not quarterly or annual).

| Income Type                  | Name 1                          |                              | Name 2                          |                              |
|------------------------------|---------------------------------|------------------------------|---------------------------------|------------------------------|
|                              | Gross (Before Taxes/Deductions) | Net (After Taxes/Deductions) | Gross (Before Taxes/Deductions) | Net (After Taxes/Deductions) |
| 1. Salary/wage earnings      | \$                              | \$                           | \$                              | \$                           |
| 2. Rental Income             | \$                              | \$                           | \$                              | \$                           |
| 3. Child support/Alimony     | \$                              | \$                           | \$                              | \$                           |
| 4. Social Security           | \$                              | \$                           | \$                              | \$                           |
| 5. Pension Income            | \$                              | \$                           | \$                              | \$                           |
| 6. Dependent SSI income      | \$                              | \$                           | \$                              | \$                           |
| 7. Disability income         | \$                              | \$                           | \$                              | \$                           |
| 8. Unemployment Income       | \$                              | \$                           | \$                              | \$                           |
| 9. Public assistance income  | \$                              | \$                           | \$                              | \$                           |
| 10. Other:                   | \$                              | \$                           | \$                              | \$                           |
| 11. Other:                   | \$                              | \$                           | \$                              | \$                           |
| <b>Total:</b>                | \$                              | \$                           | \$                              | \$                           |
| <b>Total COMBINED Gross:</b> | \$                              |                              |                                 |                              |
| <b>Total COMBINED Net:</b>   | \$                              |                              |                                 |                              |

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| Average Monthly Debts  | Name 1 | Name 2 |
|--|--------|--------|
| 1. Rent  | \$     | \$     |
| 2. Mortgage (Principal and Interest)                                   | \$     | \$     |
| 3. Property Taxes, HOA, Insurance                                      | \$     | \$     |
| 4. Car Payment(s)  | \$     | \$     |
| 5. Car Insurance   | \$     | \$     |
| 6. Credit Cards (Total)  | \$     | \$     |
| 7. Childcare/daycare   | \$     | \$     |
| 8. Alimony/Child Support   | \$     | \$     |
| 9. School Tuition  | \$     | \$     |
| 10. Medical Debt:  | \$     | \$     |
| 11. Gas/Transportation   | \$     | \$     |
| 12. Household Utilities (Water, Electric, Gas, Trash, Landline, Cable) | \$     | \$     |
| 13. Cell Phone(s)  | \$     | \$     |
| 14. Food (groceries + eating out)                                      | \$     | \$     |
| 15. Student Loan Debt  | \$     | \$     |
| 16. Tithing  | \$     | \$     |
| 17. Other:   | \$     | \$     |
| <b>Total:</b>  | \$     | \$     |
| <b>Total COMBINED costs:</b>   | \$     | \$     |

Now, refer to your COMBINED net income on the previous page. Subtract your COMBINED costs as added on the right. This represents your monthly cash flow. Complete the calculation below.

Taking my combined monthly net income of \$\_\_\_\_\_

and subtracting my combined monthly costs of \$\_\_\_\_\_

equals \$\_\_\_\_\_.

I/we have  POSITIVE or  NEGATIVE cash flow.

| Total Value, Liquid Assets: |    | Total Value, Hard Assets:         |    |
|-----------------------------|----|-----------------------------------|----|
| 1. Stocks/Bonds/CDs:        | \$ | 1. Owner Occupied Property Value: | \$ |
| 2. Savings Account:         | \$ | 2. Investment Property value:     | \$ |
| 3. Checking Accounts:       | \$ | 3. Other:                         | \$ |
| 4. Other:                   | \$ | 4. Other:                         | \$ |
| <b>Total Value:</b>         | \$ | <b>Total value:</b>               | \$ |

Name 1 Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name 2 Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## DELAWARE OPPORTUNITIES HOUSING COUNSELING

### Program 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)

About Us and Program Purpose: Delaware Opportunities is a not-for-profit, HUD-approved comprehensive housing counseling agency. We provide free education workshops and a spectrum of housing counseling including pre-purchase, foreclosure prevention, non-delinquency post-purchase, rental, and homeless 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 participant, please affirm your roles and responsibilities along with the following disclosures (your signature at the close of this form will indicate that you agree with these responsibilities).

| Client and Counselor Roles and Responsibilities  |  |
|--|--|
| Counselor's Roles and Responsibilities   | Client's Roles and Responsibilities  |
| <ul style="list-style-type: none"> <li>* Reviewing your housing goal and your finances which includes your income, debts, assets, and credit history</li> <li>* Preparing a Client Action Plan that lists the steps that you and your counselor will take in order to achieve your housing goal</li> <li>* Preparing a household budget that will help you manage your debt, expenses, and savings.</li> <li>* Your counselor is not responsible for achieving your housing goal, but will provide guidance and education in support of your goal.</li> <li>* Neither your counselor nor Delaware Opportunities employees, agents, or directors may provide legal advice.</li> </ul> | <ul style="list-style-type: none"> <li>* Completing the steps assigned to you in your Client Action Plan</li> <li>* Providing accurate information about your income, debts, expenses, credit, and employment.</li> <li>* Attending meetings, returning calls, providing requested paperwork in a timely manner</li> <li>* Notifying Delaware Opportunities or your counselor when changing housing goal(s)</li> <li>* Attending educational workshop(s) (i.e. pre-purchase counseling workshop) as recommended</li> <li>* Retaining an attorney if seeking legal advice and/or representation in matters such as foreclosure or bankruptcy protection.</li> </ul> |
| <p><b>Termination of Services: Failure to work cooperative with your housing counselor and/or Delaware Opportunities will result in the discontinuation of counseling services. This includes, but is not limited to, missing three consecutive appointments.</b></p>  |  |

Agency Conduct. No Delaware Opportunities employee, officer, director, contractor, volunteer, or agent shall undertake any action that might result in, or create, the appearance of, administering counseling operations for personal or private gain, provide preferential treatment for any person or organization, or engage in conducting that will compromise our agency's compliance with federal regulations and our commitment to serving the best interests of our clients.

Agency Relationships. Delaware Opportunities has financial affiliation with the U.S. Department of Housing and Urban Development, the New York State Housing Finance Agency and the New York State Homes and Community Renewal and professional affiliations with HUD, USDA Rural Development, Delaware County, and banks including the Delaware County National Bank, the Delaware National Bank of Delhi, the Sidney Federal Credit Union, the Community Bank NA, and Federal Loan Banks. As a housing counseling participant, you are not obligated to use the products and services of Delaware Opportunities or our industry partners.



Alternative Services, Programs, and Products & Client Freedom of Choice: Delaware Opportunities has a first-time homebuyer program developed in partnership with the above mentioned professional affiliations. However, you are not obligated to participate in this or other Delaware Opportunities programs and services while you are receiving housing counseling from our agency. You may consider seeking alternative products and services from entities including the Federal Housing Authority (FHA) for first time homebuyer loan programs or from the Margaretville-Arkville Revitalization Committee (M-ARK) or Western Catskills Revitalization Committee for other first time homebuyer programs. You are entitled to choose whatever real estate professionals, lenders, and lending products that best meet your needs.

Referrals and Community Resources: You will be provided with a community resource list which outlines services to meet a variety of needs, including utilities assistance, emergency shelter, food banks, etc. Many of these services are provided by Delaware Opportunities including but not limited to rental assistance, home rehabilitation, weatherization, emergency food, Head Start, Medicaid Transportation, WIC, HEAP, Food Stamp Eligibility screening, Day Care, Respite Care, Services Coordination for Developmentally Disabled, Domestic Violence, Rape Crisis, Employment and Training, Family Development, Used Clothing, and Senior Dining.

Errors and Omissions and Disclaimer of Liability: I/we agree that Delaware Opportunities, 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 the Delaware Opportunities counseling services, and I hereby release and waive all claims of action against Delaware Opportunities and its affiliates. I have read this document, understand that I 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, Delaware Opportunities 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 Delaware Opportunities grantors such as HUD.

**I/we acknowledge that I/we received, reviewed, and agree to Delaware Opportunities Program Disclosures**

\_\_\_\_\_  
Name 1 Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Counselor's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name 2 Signature

\_\_\_\_\_  
Date

## Data Release Form & Third Party Authorization

*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.*

You hereby authorize and instruct Delaware Opportunities Inc. (DO) and/or its assigned agents to:

- Obtain and review your credit report, and
- Request verifications of your income and rental history, and any other information deemed necessary for improving your housing situation (for example, verifying your annual property tax obligations and homeowner's insurance fees)

Your credit report will be obtained from a credit reporting agency chosen by DO. You understand and agree that DO intends to use the credit report for the purpose of evaluating your financial readiness to purchase or rent a home and/or to engage in post-purchase counseling activities. You hereby authorize DO to share your credit report and any information that you provided (including any computations and assessments produced) with the entities listed below in order to help DO determine your viable financial options.

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> Lenders                       | <input type="checkbox"/> Banks                   | <input type="checkbox"/> Mortgage Servicers         |
| <input type="checkbox"/> Debt Collectors               | <input type="checkbox"/> Landlords               | <input type="checkbox"/> Public Housing Authorities |
| <input type="checkbox"/> Property Management Companies | <input type="checkbox"/> Social Service Agencies | <input type="checkbox"/> Counseling Agencies        |

Entities such as mortgage lenders and/or counseling agencies may contact your DO counselor to evaluate the options for which you may be eligible. In connection with such evaluation, you authorize the credit reporting and/or financial agencies to release information and cooperate with your DO counselor. No information will be discussed about you with entities not directly involved in your efforts to improve your housing situation.

You hereby authorize the release of your information to program monitoring organizations of DO, including but not limited to, Federal, State, and nonprofit partners for program review, monitoring, auditing, research, and/or oversight purposes. In addition you authorize DO to have your credit report pulled two additional times to conduct program evaluations. You also agree to keep DO informed of any changes in address, telephone number, job status, marital status, or other conditions which may affect your eligibility for a program you have applied for or a counseling service that you are seeking.

**Finally, you understand that you may revoke consent to these disclosures by notifying DO in writing.**

|                                  |                               |                           |                      |
|----------------------------------|-------------------------------|---------------------------|----------------------|
| _____<br><b>Name 1 (Printed)</b> | ____/____/____<br><b>SSN#</b> | _____<br><b>Signature</b> | _____<br><b>Date</b> |
|----------------------------------|-------------------------------|---------------------------|----------------------|

|                                  |                               |                           |                      |
|----------------------------------|-------------------------------|---------------------------|----------------------|
| _____<br><b>Name 2 (Printed)</b> | ____/____/____<br><b>SSN#</b> | _____<br><b>Signature</b> | _____<br><b>Date</b> |
|----------------------------------|-------------------------------|---------------------------|----------------------|





# Delaware Opportunities Inc. Agency Intake Form

**PLEASE PRINT ALL AREAS NEATLY AND LEGIBLY**

Please complete the front and back of this form to the best of your knowledge; all information provided is strictly confidential and may be shared with other programs at Delaware Opportunities Inc. with your signed consent.

Applicant signature: \_\_\_\_\_

Staff signature if unable to obtain a signature and verbal consent was obtained: \_\_\_\_\_

Program: Housing Counseling Date of visit: \_\_\_\_\_ Service site: \_\_\_\_\_

Social security number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

First name: \_\_\_\_\_ MI: \_\_\_\_\_ Last name: \_\_\_\_\_ DOB: \_\_\_\_\_

Mailing address:

House number Apt # Street City State Zip Code Town

Physical address:

House number Apt # Street City State Zip Code Town

County: \_\_\_\_\_

Best way to reach you: (circle one) email mail home phone cell phone message phone/other

home phone number: \_\_\_\_\_ cell phone number: \_\_\_\_\_

email address: \_\_\_\_\_ message phone/other/social media name: \_\_\_\_\_

Household type, check one:

- multigenerational  other  single parent female  single parent male  single person only  two adults only  two parent  unrelated adult  unrelated adults with child  unspecified

Housing situation, check one:

- homeless  other  other permanent housing  own  own mobile home  own multifamily  rent  temp stable  temp unstable

Information regarding gender, education, or disability is collected for statistical information only. This information will not be used to determine eligibility. Some of this information is requested by the Federal Government in order to monitor laws prohibiting discrimination against those seeking services. You are not required to furnish this information, but you are encouraged to do so.

For office use only:

\_\_\_\_\_ Initials of staff that entered data into Captain/central intake \_\_\_\_\_ date

\_\_\_\_\_ Initials of staff that entered data into program intake \_\_\_\_\_ date

\_\_\_\_\_ Initials of staff that returned intake to program \_\_\_\_\_ date

| Marital Status | Relation to Applicant | Race | Education | Insurance  | Gender: | Pregnant: | Marital status: see codes below | Relation to applicant; see codes below | Ethnicity: Hispanic: Y or N | Race: see codes below | Education: see codes below | Health Insurance: see codes below | Veteran: Y or N (if Active; A) | Disabled: Y or N | Work status: See codes below | Farmer: Y or N | Gross monthly income for each HH member | Source of income: see codes below | Disconnected youth: see codes below | Non-cash benefits: see codes below |  |
|----------------|-----------------------|------|-----------|------------|---------|-----------|---------------------------------|--|-----------------------------|-----------------------|----------------------------|-----------------------------------|--------------------------------|------------------|------------------------------|----------------|---|-----------------------------------|-------------------------------------|------------------------------------|--|
| ** EXAMPLE **  | JOHN                  | J    | SMITH     | 01/01/2010 | M       | N         | A                               | A                                      | Y                           | E                     | E                          | H                                 | Y                              | N                | B                            | N              | 1500.00                                 | P                                 | F                                   | D, C                               |  |
|                |                       |      |           |            |         |           |                                 |  |                             |                       |                            |                                   |                                |                  |                              |                |   |                                   |                                     |                                    |  |
|                |                       |      |           |            |         |           |                                 |  |                             |                       |                            |                                   |                                |                  |                              |                |   |                                   |                                     |                                    |  |
|                |                       |      |           |            |         |           |                                 |  |                             |                       |                            |                                   |                                |                  |                              |                |   |                                   |                                     |                                    |  |
|                |                       |      |           |            |         |           |                                 |  |                             |                       |                            |                                   |                                |                  |                              |                |   |                                   |                                     |                                    |  |
|                |                       |      |           |            |         |           |                                 |  |                             |                       |                            |                                   |                                |                  |                              |                |   |                                   |                                     |                                    |  |
|                |                       |      |           |            |         |           |                                 |  |                             |                       |                            |                                   |                                |                  |                              |                |   |                                   |                                     |                                    |  |
|                |                       |      |           |            |         |           |                                 |  |                             |                       |                            |                                   |                                |                  |                              |                |   |                                   |                                     |                                    |  |
|                |                       |      |           |            |         |           |                                 |  |                             |                       |                            |                                   |                                |                  |                              |                |   |                                   |                                     |                                    |  |
|                |                       |      |           |            |         |           |                                 |  |                             |                       |                            |                                   |                                |                  |                              |                |   |                                   |                                     |                                    |  |
|                |                       |      |           |            |         |           |                                 |  |                             |                       |                            |                                   |                                |                  |                              |                |   |                                   |                                     |                                    |  |

**Marital Status**  
A. Single  
B. Married  
C. Widowed  
D. Separated  
E. Divorced  
F. Other  
G. Unspecified

**Relation to Applicant**  
A. Applicant  
B. Mother  
C. Mother figure  
D. Father  
E. Father figure  
F. Child  
G. Sister  
H. Brother  
I. Guardian  
J. Friend  
K. Spouse  
L. Grandparent  
M. Foster parent  
N. Foster child  
O. Grandchild  
P. Other  
Q. Other related  
R. Partner  
Q. Relative  
S. Stepfather  
T. Stepmother

**Race**  
A. Native American  
B. Asian  
C. Caucasian/White  
D. African American/Black  
E. Bi-Racial/Multi Racial  
F. Hawaiian/Pacific Islander  
G. Other  
H. Unknown/not reported

**Education**  
A. 0-8  
B. 9-12 Non-grad  
C. High School grad  
D. GED  
E. 12+ some college  
F. 2 yr. college grad  
G. 4 yr. college grad  
H. Vocational  
U. Unspecified

**Insurance**  
P. Private  
A. Medicare  
H. Medicaid/Fidels  
E. Employment Based  
M. Military  
C. Child Health Plus  
N. None  
U. Unspecified

**Work status**  
A. Full time  
B. Part time  
C. Retired  
D. Unemployed short term 6 months or less  
E. Unemployed long term over 6 months  
F. Unemployed/not in labor force  
G. Unknown/not reported

**Source of Income**  
A. Allimony  
B. Child Support  
C. None  
D. Other  
E. Pension  
F. Private Disability  
G. Public Assistance/TANF  
H. Rental income  
I. Self-employed  
J. Social Security  
K. SSDI  
L. SSI  
M. Unemployment Insurance  
N. Unspecified  
O. Veterans benefits  
P. Wages  
Q. Workman's Compensation  
R. Not reported

**Disconnected Youth**  
A. In School/Not Working  
B. In school/Working  
C. Not in school/Not Working  
D. Over 24  
E. Unknown/Not Reported  
F. Working/Not in school

**Non-Cash Benefits**  
I. Affordable care act/Marketplace  
H. Child care voucher/day care subsidy  
D. Housing choice voucher/Section 8  
C. HEAP  
N. None  
J. Other  
A. SNAP/food stamps  
K. Unknown/not reported  
B. WIC  
U. Unknown/not reported