

Mortgage Loan/Account number _____



BCL of Texas
Business & Community Lenders

HOME RETENTION SOLUTIONS INTAKE PACKET

Counselor: _____

BCL of Texas
Entrepreneurship Center
2212 S. Congress Ave.
Austin, TX 78704
1-888-241-2215
512-383-0025
512-610-2568 fax
askus@bcloftexas.org

BCL of Texas
Homeownership Center
1322 Record Crossing
Dallas, TX 75235
1-877-688-7457
Local: 214-688-7456
214-688-7465 fax
housing@bcloftexas.org

www.bclhomeownershipcenter.org

Borrower's Signature

Date

Co-Borrower's Signature

Date

Mortgage Loan/Account number

BCL Intake Packet Information

Customer Information

HomeOwners Name: _____
First Middle Last

Co Borrowers Name: _____
First Middle Last

Property Address: _____

City State Zip Code

Home: (____) _____ - _____ Cell: (____) _____ - _____

Email: _____ Birthdate: ____/____/____

Ethnicity (please mark): White Hispanic American Indian/Alaskan
 Asian/Pacific Islander Black or African American Other _____

Foreign Born: Yes No

Marital Status (please mark): Single Married Divorced Separated
 Widow

Gender (please mark): Man Women

Disabled (please mark): Yes No

Veteran (please mark): Yes No

Household Type (please select the most accurate)? Single adult
 Two or more unrelated adults Female headed single parent household
 Male headed single parent household Married without children
 Married with children Other _____

Household Size: _____

Annual Income: \$ _____

Referred to BCL of Texas by (please mark all that apply):
 TDHCA Hope Hotline Lender Realtor Realtor
 Walk-In Brochure/Flyer Internet Radio Newspaper

If you were referred by a bank, which one? _____

If referred by another source not listed above, which one? _____

Borrower's Signature Date

Co-Borrower's Signature Date

Mortgage Loan/Account number

Home Information

Mortgage Servicer: _____

Mortgage Servicer's Contact #: _____

Type of Loan: 30 yr Conv. ARM FHA VA Equity
 Other _____

Mortgage Date Closed: _____

Borrower on Deed or Trust: Yes No

Primary Residence: Yes No

Please check all that apply: I live in this house House is vacant
 House is rental property Estranged/ex spouse lives in the house
 Other family member lives in the house Other _____

Monthly Payments: \$ _____ Interest Rate: _____%

Taxes and Insurance: \$ _____

Current Principle Balance: \$ _____

of months behind: _____ Amount past due: _____

Lender notified of circumstances: Yes No

Employment Information

Primary HomeOwners Employment Status (please mark): Full Time (35hours +)
 Part Time (35hours or less) Self Employed Unemployed Retired

Current Employer: _____ Yrs _____ Mths _____

Previous Employer: _____ Yrs _____ Mths _____

If unemployed, source(s) of income: _____

2nd HomeOwners Employment Status (please mark): Full Time (35hours +)
 Part Time (35hours or less) Self Employed Unemployed Retired

Current Employer: _____ Yrs _____ Mths _____

Previous Employer: _____ Yrs _____ Mths _____

If unemployed, source(s) of income: _____

Borrower's Signature Date

Co-Borrower's Signature Date

Mortgage Loan/Account number _____

Home Budget Information

Household Income:

Monthly Income	Primary HomeOwner			2nd HomeOwner		
	Gross	Net	Verification	Gross	Net	Verification
Monthly Wages	\$	\$		\$	\$	
Other Employment	\$	\$		\$	\$	
Child/Spousal Support	\$	\$		\$	\$	
Social Security	\$	\$		\$	\$	
Unemployment	\$	\$		\$	\$	
Disability	\$	\$		\$	\$	
Veteran Benefits	\$	\$		\$	\$	
Retirement Income	\$	\$		\$	\$	
Other Income	\$	\$		\$	\$	
(1) Total Income	\$	\$		\$	\$	

Household Expenses:

Monthly Expenses	Monthly Payment		
Mortgage Payment	\$	Credit Card	\$
Taxes/Insurance/HOA Dues	\$	Groceries & Personal Items	\$
Car Payment	\$	Childcare	\$
2nd Car Payment	\$	Medical	\$
Auto Insurance	\$	Clothing	\$
Gas	\$	Pocket Money	\$
Transportation	\$	Alimony/Child Support	\$
Telephone (cell) & Internet	\$	Charity	\$
Electricity & Gas	\$	Gym/Club Membership	\$
Cable	\$	Personal Loan	\$
Water	\$	Other Loan	\$
Credit Card	\$	Other	\$
		Other	\$
		(2) Total Expenses	\$

(1) Total Monthly Income: \$ _____

(2) Total Monthly Expenses: - \$ _____

Deficit/Surplus: = \$ _____

All of the information that I/We have provided in this worksheet is correct and factual. No information has been withheld. We understand the necessity for accurate and complete information and we will provide any needed information to complete this worksheet. We understand that deliberately providing inaccurate information or an unwillingness to provide the counselor with the necessary information or documents in a timely manner will result in a closing of our file and no further assistance from the counselor will be provided.

Borrower's Signature _____

Date _____

Co-Borrower's Signature _____

Date _____

