

Appendix A. Lender Intake Form

HUD's Pre-Purchase Homeownership Counseling Demonstration and Impact Evaluation

Lender Intake Form

Information about Lender

1. Lender's Name
2. MSA

Data Transfer Date

Information about Client

1. Client's First Name
2. Client's Last Name
3. Address, City, State, Zip
4. Preferred Phone Number
5. Alternative Phone Number
6. Email
7. Date of Birth
8. Date customer gave consent for contact information to be sent to the study team
9. Date customer first contacted lender about home loan
10. Unique CustomerIdentifier
11. First-time homebuyer status
12. Presence of a coborrower
13. Name and first-time homebuyer status of coborrower(s)
14. Language preference: English or Spanish