

PUTNAM COUNTY HOUSING CORPORATION  
 11 SEMINARY HILL ROAD  
 CARMEL, NEW YORK – 10512

HOMEBUYER INTAKE FORM

**Applicant**

Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 \_\_\_\_\_ Zip \_\_\_\_\_  
 Home Phone: \_\_\_\_\_  
 Work Phone: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_  
 Date of Birth: \_\_\_\_\_  
 Soc. Security #: \_\_\_\_\_  
 E-Mail: \_\_\_\_\_  
 Marital Status: \_\_\_\_\_  
 Currently You: *Own Rent*  
 If Rent, How long \_\_\_\_\_  
 Housing Payment: \$ \_\_\_\_\_  
 Are you receiving Sect. 8: *Yes No*  
 Self-Employed: *Yes No*  
 Employer: \_\_\_\_\_  
 Employer Address: \_\_\_\_\_  
 \_\_\_\_\_  
 Position: \_\_\_\_\_  
 Years Employed: \_\_\_\_\_ Hire date \_\_\_\_\_  
 Annual Gross Income: \$ \_\_\_\_\_  
 Source(s): \_\_\_\_\_

**Co-Applicant**

Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 \_\_\_\_\_ Zip \_\_\_\_\_  
 Home Phone: \_\_\_\_\_  
 Work Phone: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_  
 Date of Birth: \_\_\_\_\_  
 Soc. Security #: \_\_\_\_\_  
 E-Mail: \_\_\_\_\_  
 Currently You: *Own Rent*  
 If Rent, How long \_\_\_\_\_  
 Housing Payment: \$ \_\_\_\_\_  
 Are you receiving Sect. 8: *Yes No*  
 Self-Employed: *Yes No*  
 Employer: \_\_\_\_\_  
 Employer Address: \_\_\_\_\_  
 \_\_\_\_\_  
 Position: \_\_\_\_\_  
 Years Employed: \_\_\_\_\_ Hire date \_\_\_\_\_  
 Annual Gross Income: \$ \_\_\_\_\_  
 Source(s): \_\_\_\_\_

1. Total number of family members in household: \_\_\_\_\_
- 1a. Total additional income from household members over the age of 18 \$ \_\_\_\_\_ (Required)
2. Total number of family members in household under the age of 18 \_\_\_\_\_ (# of persons)
3. What amount do you currently have for down payment: \$ \_\_\_\_\_ (Estimate)
4. Have you or your Co-Applicant/Spouse owned a home within the last three (3) years of the date of this application?  YES  NO
- 4a. If "YES", explain the circumstances under which you no longer own a home: \_\_\_\_\_

---

5. Are you currently on the note and mortgage of deed of a property with someone else?  
 YES  NO

\*Please be advised this is NOT an application to apply for financing or grant assistance. This is used for registration and demographics purposes only.



PUTNAM COUNTY HOUSING CORPORATION  
Privacy Policy

Putnam County Housing Corporation 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 "non-public 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. We may also use anonymous aggregated case file information for the purpose of evaluation our services, gathering valuable research information and designing future programs.

Types of information that we may gather about you:

1. Information we receive from you orally, on applications or other forms, such as your name, address, social security number, assets and income;
2. 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
3. Information we receive from a credit reporting agency, such as your credit history.

You may Opt-out of certain disclosures:

1. You have the opportunity to "opt-out" of disclosures of your nonpublic personal information to third parties.
2. If you choose to "opt-out," we will not be able to answer questions from your creditors. If at any time you wish to change your decision with regard to your "opt-out," you may contact us.

Release of your information to third parties:

1. So long as you have not opted-out, we may disclose some or all of the information that we collect, as described above, to your creditors or third parties where we have determined that it would be helpful to you, would aid us in counseling you, or is a requirement of grant awards which make our services possible.
2. We may also disclose any nonpublic personal information about you or former customers to anyone as permitted by law.
3. Within the organization, we restrict access to nonpublic personal information about you to those employees who need to know that information to provide services to you. We maintain physical, electronic and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.

*I understand that my name and telephone number will not be shared with other parties, but that other information gathered may be used for research, program or policy development, or other legitimate purposes by the New York State Office of the Attorney General and parties with which it contracts (such as the Center for New York City Neighborhoods and Empire Justice Center), or other relevant funders.*

CLIENT'S NAME (Print) \_\_\_\_\_ CLIENT'S NAME (Print) \_\_\_\_\_

SIGNATURE \_\_\_\_\_ SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_ DATE \_\_\_\_\_

PUTNAM COUNTY HOUSING CORPORATION  
**OPT-OUT ELECTION FORM**  
HOUSING COUNSELING PRIVACY DISCLOSURE

1. I understand that Putnam County Housing Corporation (PCHC) provides Housing Counseling with funding from U.S. Department of Housing and Urban Development (HUD) and other state and federal agencies.
  
2. I understand as a part of funding requirements, some of my personal information will be shared with program administrators or their evaluators.
  
3. I acknowledge that I have received a copy of Putnam County Housing Corporation's Privacy Policy. I have elected to **OPT-OUT** of disclosures of my nonpublic personal information to third parties.

Client Name \_\_\_\_\_ Client Name \_\_\_\_\_

Signature \_\_\_\_\_ Signature \_\_\_\_\_

Date \_\_\_\_\_ Date \_\_\_\_\_

\*\*\*\*\*Sign this page only if you are Opting out\*\*\*\*\*

**Putnam County Housing Corporation  
Comprehensive Housing Counseling Program Disclosure**

I/We understand that the purpose of the housing counseling program is to provide one-on-one counseling to assist me/us with our counseling needs. The counselor will analyze my/our financial situation, identify those barriers preventing me/us from resolving our current situation, and develop a plan to remove those barriers. I/We further understand that it will not be the responsibility of the counselor to fix the problem for me/us but rather to provide guidance and education to empower me/us in fixing those issues.

Funders include U.S. Department of Housing and Urban Development, New York State Attorney General's Office, the New York State Division of Housing and Community Renewal and the State of New York Mortgage Agency.

Putnam County Housing Corporation offers the following services and has financial relationships with following industry partners:

- HUD Housing Choice Voucher Program (Section 8)
- HUD Comprehensive Housing Counseling Program
- NYS Attorney General's Home Ownership Protection Program (HOPP)
- NYS Mortgage Assistance Program (NYS-MAP)
- Project Reinvest: Financial Capability Program
- SONYMA/NCC Restart Program
- Family Self-Sufficiency Program (FSS)
- USDA Rural 502 Direct Loan Packager
- Federal Home Loan Bank (FHLB) First Home Club with local partners: Tompkins Mahopac Bank; M & T Bank; PCSB Bank; and Hudson Valley Federal Credit Union.
- Senior Housing at Lakeview Senior Apartments
- Senior Housing at Gleneida Court Senior Apartments
- Senior Housing at Gleneida Senior Apartments
- Senior Housing at Mahopac Hills

I/We understand that Putnam County Housing Corporation provides information and education on alternative services, programs and products. I/We further understand that we are not obligated to receive any other services offered by the organization or its exclusive partners.

Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

Borrower: AUTHORIZATION TO RELEASE INFORMATION

Dear Sir or Madam:

I/We are working with the Putnam County Housing Corporation in Carmel, New York (a HUD certified counseling agency) (PCHC). I/We hereby authorize you to release any and all information concerning our account to the PCHC at their request. I/We further authorize you to discuss our case with Margherita Diaz or Suzanne Brought..

You may release additional information to the PCHC in the future without further authorization.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print

\_\_\_\_\_  
Print

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date



## Buying Owning and a Home MONTHLY BUDGET WORKSHEET

Find this and other resources at <http://www.freddiemac.com/calculators>

Budget for the month of:

- 
- Complete all fields that apply.
- Track your monthly expenses for at least two months with this worksheet to see where you are spending your money.
- Fields with an \* are not monthly bills but expenses likely to occur throughout the year. Budget and save a set amount for each that might apply to you so you have the extra money to pay these bills.
- If your budget is tight, skimp on entertainment, eating out vacation, etc. Do not skimp on your personal savings account, except as a last resort.
- If you are having trouble, consider making an appointment with a credit counselor. Bring this worksheet so the counselor can see where your money is going.

Category	Monthly Budget	Monthly Actual	Difference	Notes
<b>Income</b>				
Monthly Pay (after taxes)				
Alimony or child support received				
Other Income				
<b>Total Monthly Income</b>				
<b>Expenses: Housing</b>				
Mortgage or Rent				
Real Estate Property Tax				
Personal Property Tax				
Homeowner's Or Renter's Insurance				
Homeowner's Association Condo Fees				
<b>Total Housing Expenses</b>				
<b>Expenses: Utilities</b>				
Electric				
Gas/Heating Oil				
Water/Sewage				
Telephone				
Trash Collection				
Cable TV				
Internet Provider				
Cell Phone				



# Buying Owning and a Home MONTHLY BUDGET WORKSHEET

Find this and other resources at <http://www.freddiemac.com/calculators>

Category	Monthly Budget	Monthly Actual	Difference	Notes
<b>Expenses: Health/Medical</b>				
*Expenses that you can budget for, so you have money saved to pay for unplanned or annual bills.				
Medical Insurance				
Dentist/Dental Insurance				
Doctor/Lab*/ Therapist*				
Orthodontist*				
Eyeglasses/Ophthalmologist*				
Hospital/Emergency*				
Medicines*				
Other				
<b>Total Health/Medical Expenses</b>				
<b>Expenses: Transportation</b>				
*Expenses you can budget for, so you have money saved to pay for unplanned or annual bills.				
Car Payments				
Car Insurance				
Car Maintenance/Repair*				
Mass Transit Costs				
Gas				
Parking/Tolls				
Tags/Inspection*				
<b>Total Transportation Expenses</b>				
<b>Expenses: Credit Cards, Loans, Other Expenses</b>				
*Expenses you can budget for, so you have money saved to pay for unplanned or annual bills.				
Credit Card: Balance:				
Credit Card: Balance:				
Credit Card: Balance:				
Student Loans				
Legal Fees				
Alimony or Child Support Paid				
<b>Total Credit Card/Loan/Other Exp.</b>				





## Buying Owning and a Home MONTHLY BUDGET WORKSHEET

Find this and other resources at <http://www.freddiemac.com/calculators>

Category	Monthly Budget	Monthly Actual	Difference	Notes
<b>Expenses: Food and Entertainment</b>				
Groceries/Meals Out				
Entertainment (movies, etc.)				
<b>Total Food and Entertainment</b>				
<b>Expenses: Children</b>				
Child Care				
School Tuition/Supplies				
Lunch Money				
Lessons/Sports				
New Clothing/Personal Grooming				
Other				
<b>Total Children Expenses</b>				
<b>Expenses: Personal</b>				
Dry Cleaning/Laundry				
Personal Grooming				
New Clothing				
<b>Total Personal Expenses</b>				
<b>Expenses: Savings/Large Expenses</b>				
*Expenses you can budget for, so you have money saved to pay for unplanned or annual bills.				
Personal Savings amt going into an acct each month?				
Gifts (holiday, birthday)*				
House Maintenance/Repairs*				
Furniture*				
Church/Charity*				
Vacation*				
<b>Total Savings/Large Expenses</b>				
<b>Total Monthly Income</b>				
<b>Total Monthly Expenses</b>				
<b>Difference</b>				