

**DO NOT SEND ORIGINAL DOCUMENTATION - COPIES ONLY.**  
**ALL REQUIRED DOCUMENTS MUST BE TURNED IN WITH COMPLETED FORM TO BE PROCESSED.**

### Required Documents

1. Copy of valid identification, use **one** of the following:

- ☐ Driver's license with photo
- ☐ PA state photo identification
- ☐ Passport with photo
- ☐ Alien I.D. Card with photo
- ☐ Armed Forces I.D. with photo

2. Income Verification, include income for all household members ages 18 and older:\*

- ☐ W-2 Income: Most current paycheck stubs for 30-day period
- ☐ Self-Employment/1099 Income: Most current two years of 1040 Tax Returns with all Schedules
- ☐ (SSI): Supplemental Security Income Award Letter
- ☐ (SSDI): Social Security Disability Insurance
- ☐ Official court order for child support income

\*Reveal alimony, child support, separate maintenance or other income ONLY IF you want it considered as income for the Dollar Bank Homeownership Program.

3. Most current bank statements for two months

☐ Check or Money Order payable to Dollar Bank to cover the cost of your credit report:

- ☐ \$20.00 for each individual person
- ☐ \$37.00 for married couples
- ☐ \$40.00 for unmarried couples

☐ **Mail all of the above to:**

Dollar Bank, FSB  
Community Development  
20 Stanwix Street  
1<sup>st</sup> Floor  
Pittsburgh, PA 15222

**AFTER WE RECEIVE ALL NECESSARY INFORMATION, WE WILL CONTACT YOU TO DISCUSS NEXT STEPS.**

### Questions?

Contact Community Development at:  
community\_development\_pa@dollarbank.com  
or 412-261-8109.



## Homeownership Program Intake Form

How did you hear about the Dollar Bank Homeownership Program? \_\_\_\_\_

### Applicant's Personal Data - for purposes of pulling your credit report

Married

Unmarried

Separated

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Number of Dependents \_\_\_\_\_ Ages \_\_\_\_\_

Home / Cell \_\_\_\_\_ Email Address \_\_\_\_\_

Social Security Number \_\_\_\_\_

Present Address \_\_\_\_\_

From (Month/Year) \_\_\_\_\_ To (Month/Year) \_\_\_\_\_ Rent Amount \_\_\_\_\_

Is your rent subsidized?    Yes    No

### Applicant's Employment History - Please include two years of employment history.

Current Employer \_\_\_\_\_ Phone # \_\_\_\_\_

Address \_\_\_\_\_

Position \_\_\_\_\_ From (Month/Year) \_\_\_\_\_ To (Month/Year) \_\_\_\_\_

Gross Mth. / Yr. Income \_\_\_\_\_

Current Second Job Employer \_\_\_\_\_ Phone # \_\_\_\_\_

Address \_\_\_\_\_

Position \_\_\_\_\_ From (Month/Year) \_\_\_\_\_ To (Month/Year) \_\_\_\_\_

Gross Mth. / Yr. Income \_\_\_\_\_

Former Employer \_\_\_\_\_ Phone # \_\_\_\_\_

Address \_\_\_\_\_

Position \_\_\_\_\_ From (Month/Year) \_\_\_\_\_ To (Month/Year) \_\_\_\_\_

Gross Mth. / Yr. Income \_\_\_\_\_

Former Employer \_\_\_\_\_ Phone # \_\_\_\_\_

Address \_\_\_\_\_

Position \_\_\_\_\_ From (Month/Year) \_\_\_\_\_ To (Month/Year) \_\_\_\_\_

Gross Mth. / Yr. Income \_\_\_\_\_

### Applicant's Additional Income - Include all income for household members aged 18 years and older. Examples of additional income:

SSI, SSD, child support, etc. (Reveal child support only if you want it considered as income for the Homeownership Program.)

Amount of additional income \_\_\_\_\_

Explain \_\_\_\_\_

Amount of current savings accounts \_\_\_\_\_

### Co-Applicant's Personal Data - for purposes of pulling your credit report

Married

Unmarried

Separated

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Number of Dependents \_\_\_\_\_ Ages \_\_\_\_\_

Home / Cell \_\_\_\_\_ Email Address \_\_\_\_\_

Social Security Number \_\_\_\_\_

Present Address \_\_\_\_\_

From (Month/Year) \_\_\_\_\_ To (Month/Year) \_\_\_\_\_ Rent Amount \_\_\_\_\_

Is your rent subsidized?    Yes    No

### Co-Applicant's Employment History - Please include two years of employment history.

Current Employer \_\_\_\_\_ Phone # \_\_\_\_\_

Address \_\_\_\_\_

Position \_\_\_\_\_ From (Month/Year) \_\_\_\_\_ To (Month/Year) \_\_\_\_\_

Gross Mth. / Yr. Income \_\_\_\_\_

Current Second Job Employer \_\_\_\_\_ Phone # \_\_\_\_\_

Address \_\_\_\_\_

Position \_\_\_\_\_ From (Month/Year) \_\_\_\_\_ To (Month/Year) \_\_\_\_\_

Gross Mth. / Yr. Income \_\_\_\_\_

Former Employer \_\_\_\_\_ Phone # \_\_\_\_\_

Address \_\_\_\_\_

Position \_\_\_\_\_ From (Month/Year) \_\_\_\_\_ To (Month/Year) \_\_\_\_\_

Gross Mth. / Yr. Income \_\_\_\_\_

Former Employer \_\_\_\_\_ Phone # \_\_\_\_\_

Address \_\_\_\_\_

Position \_\_\_\_\_ From (Month/Year) \_\_\_\_\_ To (Month/Year) \_\_\_\_\_

Gross Mth. / Yr. Income \_\_\_\_\_

### Co-Applicant's Additional Income - Include all income for household members aged 18 years and older. Examples of additional income: SSI, SSD, child support, etc. (Reveal child support only if you want it considered as income for the Homeownership Program.)

Amount of additional income \_\_\_\_\_

Explain \_\_\_\_\_

Amount of current savings accounts \_\_\_\_\_

1. **How long will the program take?** Each situation is different and the time it takes to correct your credit issues depends upon your credit history, the financial resources you can commit to eliminating negative debt and saving for certain down payment costs.
2. **How much does it cost to enroll in the Homeownership Program?** The program is free. You are responsible for the cost of your credit report. The cost is \$20 for a single credit report, \$37 for a married couple or \$40 for an unmarried couple.
3. **Is there a minimum income I need to enter the program?** We require a minimum income of \$26,000 a year.
4. **Is there a maximum income limit for the Homeownership Program?** Yes - it's the current median family income from The Department of Housing and Urban Development (HUD).
5. **What is considered income?** Qualified income includes salary and wages, social security, supplemental security income, court mandated child support payments and pensions. Department of Public Assistance payments are not eligible.
6. **May I bring a credit report received from another source?** No, we use an up-to-date Tri Merge credit report that provides the most complete picture of potential credit issues including public records, payment history and contact information for creditors.
7. **Do you offer classes and appointments on weekends?** Individual appointments are available Monday through Friday, 9:30 AM to 4:00 PM, with limited availability outside of those hours. Group classes and workshops take place in the evenings.
8. **I have really bad credit; may I still enroll in the Homeownership Program?** Yes. There are many variables that contribute to acceptance into the program, and many of the participants require credit counseling. We encourage you to apply.
9. **What is discussed at the first appointment?** We will discuss your credit report and financial situation with you, while creating an action plan for next steps.
10. **How long are the appointments?** Between 45 minutes and one hour.
11. **Where are the appointments held?** They are held virtually or in-person at the Dollar Bank corporate offices located in downtown Pittsburgh at 20 Stanwix Street.
12. **I do not have a job right now; may I still enroll in the Homeownership Program?** A source of income is required to participate. We suggest you delay enrolling in the program until you secure permanent employment.
13. **Can we buy a house in a place outside the Pittsburgh area?** The Homeownership Program is designated for loans for homebuyers in the Greater Pittsburgh Area (Allegheny and surrounding counties).
14. **What am I responsible for doing in between meetings?** You are responsible for contacting (through letters and phone calls) your creditors and for maintaining contact with your Dollar Bank credit counselor.
15. **What should I bring to each counseling session?** Always bring a pen and notebook to take notes. A calendar will help you keep track of important dates and appointments. We suggest that you begin organizing your financial papers and bring copies of any specific documents when they are requested.
16. **Am I eligible for the program for down payment and closing cost assistance without enrolling in the Homeownership Program?** No, these funds are only available to qualified families that have enrolled in the Homeownership Program and successfully fulfilled its requirements.

### Initials of ALL Participant(s)

- |       |    |  |
|-------|----|--|
| _____ | 1. | (I) (We) fully understand that the Dollar Bank Homeownership Program provides information that will assist in resolving credit problems that could be an issue in qualifying for a home purchase mortgage. |
| _____ | 2. | (I) (We) fully understand that the credit counseling process offered by Dollar Bank provides detailed information on mortgage requirements and assists me/us in understanding mortgage credit analysis.    |
| _____ | 3. | (I) (We) fully understand that the program does not guarantee me/us an approval of a residential mortgage application with Dollar Bank or any other financial institution.                                 |
| _____ | 4. | (I) (We) fully understand that Dollar Bank shall not be responsible for any credit decision or action, taken based on information provided by the Homeownership Program of Dollar Bank.                    |
| _____ | 5. | (I) (We) authorize Dollar Bank to obtain a consumer credit report(s) to assist in the evaluation of my/our credit.   |
| _____ | 6. | (I) (We) authorize Dollar Bank to correspond by electronic means (email, text message, etc.) in regard to class notifications, special event reminders, etc. (This authorization is optional.)             |

### ALL APPLICANTS MUST SIGN, PRINT AND DATE BELOW:

By:

\_\_\_\_\_  
(Participant's Signature)

\_\_\_\_\_  
(Printed Name)

Date:

By:

\_\_\_\_\_  
(Participant's Signature)

\_\_\_\_\_  
(Printed Name)

Date: