

Connect to Own[®] Program

Homebuyer Education Provider Assessment Form

Instructions

Please complete this form in its entirety and return completed Assessment with all required documents to:
homebuyereducation@bofa.com

Checklist for a completed package:

- Completed Assessment Form
- 501(c)(3) document
- HUD Action Plan (only required when Online Education is provided)
- Agency 3rd Party Client Authorization
- IRS W-9 form (latest version)
- Sample copy of homebuyer education certificate(s)

Homebuyer Education (HBE) Provider Name (Agency/Organization Name):		
Physical Address—Main (number, street, and suite no.):	City, State, and ZIP code:	
Physical Address—Location 2 (if applicable):	City, State, and ZIP code:	
Provide all office locations where you offer homebuyer education (please use an additional sheet if necessary)		
Mailing Address:	Same as Physical Address	City, State, and ZIP code:
Website:		

Executive Director Name:		
Address:	Same as Physical Address—Main	City, State, and ZIP code:
Phone:	Email Address:	

Homebuyer Education Contact Name:		
Address:	Same as Physical Address—Main	City, State, and ZIP code:
Phone:	Email Address:	

Home Preservation Contact Name:		
Address:	Same as Physical Address—Main	City, State, and ZIP code:
Phone:	Email Address:	

Contact Name of Bank of America Loan Officer (if currently working with one):		
Phone:	Email Address:	

Are you an approved affiliate of a national organization? Check all that apply.		
CCCS	NCRC	UnidosUS
HomeFree-USA	NFCC	Urban League
HPN	New York Mortgage Coalition	None
MMI	NHS of New York	Other:
NeighborWorks America	NID-HCA	

Please answer ALL questions by selecting YES/NO or making the appropriate selections.

1. Is your agency a nonprofit organization? Must function as a private or public nonprofit organization. The agency must submit evidence of nonprofit status as demonstrated by Section 501c of the Internal Revenue Code. Yes No (Required) Tax ID Number:				
2. If no, is your agency a governmental or quasi-governmental organization? Yes No Comments (If no, please explain):				
3. Is your agency or an entity within your organization, originating mortgage loans or licensed as a wholesale mortgage broker? Yes No Comments (If no, please explain):				
4. Is your agency HUD certified? Yes No If yes, how long? HUD number:				
5. Is your agency a HUD intermediary? Yes No If yes, how long?				
6. Has your agency adopted the National Industry Standards for Homeownership Education and Counseling? http://www.homeownershipstandards.org/ Yes No If no, why not?				
7. Do you offer loss mitigation/foreclosure prevention counseling for homeowners whose mortgages become delinquent? Yes No If no, why not?				
8. What percentage of your clients are low or moderate income? Less than 50% 50% to 75% More than 75% 100% How do you capture this information?				
9. Do you provide classroom training and counseling in-language for pre-purchase education/counseling, home preservation counseling or landlord education?				
	<u>Pre-purchase Education & Counseling</u>	<u>Home Preservation</u>	<u>Landlord Education</u>	List other language(s), if applicable:
English				
Spanish				
Cantonese				
Mandarin				
Vietnamese				
Other				
10. Please check all that apply Instructor-led HBE Self-guided HBE Night classes Weekend classes Name of self-guided HBE program, if applicable:				
11. Is your pre-purchase homebuyer education and counseling program a minimum of 4 hours? Yes No If no, why not?				
12. Does your organization charge a fee for participation in the homebuyer education program? Yes No If yes, what is the charge?				
13. Does your homebuyer education certificate of completion disclose HUD ID#, company name or logo? Yes No Comments (If no, please explain):				

<p>14. How many homebuyer education classes are held each month?</p> <p style="text-align: center;">1 to 2 classes per month 3 to 5 classes per month 6 or more classes per month</p> <p>Comments:</p>
<p>15. What is your classroom capacity?</p> <p style="text-align: center;">Less than 5 participants 11 to 25 participants 50 or more participants</p> <p style="text-align: center;">6 to 10 participants 26 to 49 participants</p> <p>Comments:</p>
<p>16. Who are the top 3 lenders your clients work with?</p> <p>1.</p> <p>2.</p> <p>3.</p>
<p>17. What are the top 3 products your clients utilize?</p> <p style="text-align: center;">FHA/VA Conventional Special Purpose Credit Program (SPCP) Other</p> <p>List others, if applicable:</p>
<p>18. Does your organization offer a Down Payment Assistance Program? Yes No</p> <p>If yes, please provide name:</p>
<p>19. Please provide instructions on how our customers can register for your services:</p>

Assessment completed by _____

Regional manager name: _____

Date: _____

HBE point of contact name (printed): _____

Once you have completed this form please save and email the PDF with all required documents to:
homebuyereducation@bofa.com