



## Intake & Data Collection Worksheet

**Pre-Purchase**

Counselor: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Client #1 Name: \_\_\_\_\_

Client #2 Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Home Phone: \_\_\_\_-\_\_\_\_-\_\_\_\_ Work Phone: \_\_\_\_-\_\_\_\_-\_\_\_\_

Cellular: \_\_\_\_-\_\_\_\_-\_\_\_\_ E-mail Address: \_\_\_\_\_

Annual Household Income: \$\_\_\_\_\_ Marital Status: M / S / Divorced / Separated

Education Level: High School/GED    College    None    Primary    Vocational

Total # in Household: \_\_\_\_\_ Race: \_\_\_\_\_

Client #1 SSN \_\_\_\_-\_\_\_\_-\_\_\_\_ Client #2 SSN \_\_\_\_-\_\_\_\_-\_\_\_\_

Client #1 Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_ Client #2 Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_

Client #1 Ethnicity \_\_\_\_\_ Client #2 Ethnicity \_\_\_\_\_

Client #1 Employer \_\_\_\_\_ Title \_\_\_\_\_ How Long \_\_\_\_\_

Client #2 Employer \_\_\_\_\_ Title \_\_\_\_\_ How Long \_\_\_\_\_

Client #1 (Gross) Monthly Income \$\_\_\_\_\_ Take Home Pay (Net) \$\_\_\_\_\_

Client #2 (Gross) Monthly Income \$\_\_\_\_\_ Take Home Pay (Net) \$\_\_\_\_\_

How did you hear about this program? \_\_\_\_\_