

Beech Interplex, Inc.
1510 Cecil B. Moore Avenue, Suite 300, Philadelphia, PA
INTAKE FORM

DATE _____

NAME _____

_____ # of Years

ADDRESS _____
Present Address street, city, zip code (if residing at present address less than two years please complete former address)

Former Address or Subject Property

HOME # _____ WORK# _____ EMAIL _____

CELL # _____ SOCIAL SECURITY # _____

DATE OF BIRTH _____ AGE _____

HOUSEHOLD SIZE _____ ADULTS _____ CHILDREN _____ AGE _____

MARITAL STATUS _____ UNMARRIED _____ MARRIED _____ SEPARATED _____

RACE / ETHNICITY _____ HIGHEST LEVEL OF SCHOOL COMPLETED _____

HOMEOWNER _____ YES _____ NO _____ # OF YEARS ON JOB _____

EMPLOYED _____ YES _____ NO _____ # OF YEARS ON PRE. JOB _____

CURRENT EMPLOYER NAME ADDRESS _____

PREVIOUS EMPLOYER NAME & ADDRESS _____

POSITION _____

SOUCE OF INCOME IF NOT EMPLOYED _____

ANNUAL INCOME _____

CURRENT MONTHLY RENT OR MORTGAGE _____

BANK ACCOUNT _____ YES _____ NO _____ CHECKING _____ SAVINGS _____

BALANCE IN ACCOUNT _____

CREDIT CARDS & LOANS

Account name, monthly payment and balance Account name, monthly payment and balance

Account name, monthly payment and balance Account name, monthly payment and balance

OTHER INVESTMENTS

Account name, monthly payment and balance Account name, monthly payment and balance



Beech Interplex, Inc.
Beech Business Bank
Beech Community Services
Alston-Beech Foundation

KENNETH SCOTT
PRESIDENT/CEO

Authorization for Financial Disclosure

I, _____, Acknowledge receipt of financial and or other valuable Housing Services provided by Beech Interplex, Inc.

Desiring further assistance and /or services, I hereby Authorize Beech Interplex, Inc. to request and receive from any individual, company and or agency, personal and financial information, as necessary, regarding my financial profile, past and current.

By signing below, I acknowledge that I read and understand this disclosure statement.

Client Signature

Date

Client Signature

Date



Beech Interplex, Inc.
Beech Business Bank
Beech Community Services
Alston-Beech Foundation

**KENNETH SCOTT
PRESIDENT/CEO**

CLIENT AUTHORIZATION

I would like to participate with Beech Interplex, Inc. (hereafter "Beech") Loan Programs. I understand that Beech Office Manager will be discussing information which pertains to my credit history, employment and also financial and family situations.

Further, I understand that it may be necessary for Beech staff to discuss my credit history, financial situation, employment and family situations with representatives of private companies and government agencies. Accordingly, I hereby authorize Beech staff to discuss the above-mentioned personal information with representatives of private companies and governmental agencies in assisting me with a home loan.

Further, I understand that the personal information which I will provide to the staff of Beech and all discussions, which said staff might have, regarding my case will be related in a confidential manner. I also understand that information about my family and myself will be treated in a confidential manner. I also understand that no information about my family and myself will be made accessible to any unauthorized parties.

I hereby authorize Beech staff to release credit, financial, employment and other information to authorized parties solely for the purpose of applying for a home repair/improvement loan.

Client Signature

Date

Client Signature

Date