



HDF REFERRAL

Complete Information requested;

Have Customer sign

Email to FTHB@HDFconnects.org

HDF: Please accept this referral for Pre-Purchase Counseling Services from:

Loan Officer Name:

Bank:

Email:

Phone:

Customer Name(s):

Email:

Phone:

Customer Authorization for Release of Information:

I/We agree that HDF can share readiness and eligibility information with the above named bank representative.

Applicant _____

Co-applicant _____

Date _____

Customer: Please contact HDF at 203-969-1830 ext. 1003 or email FTHB@hdfconnects.org or begin intake process at www.hdfconnects.org.



Housing
Development
Fund

Bank Referrals to HDF for Pre-purchase Counseling

Process

Loan officer determines customer is not quite mortgage ready; refers to HDF for counseling by completing the attached form, obtaining customer's signature and emailing it to:

FTHB@hdfconnects.org

Form is received by HDF Leads Manager:

Sends client an email with "How to Apply" Instructions and packet requiring completion.

When the customer completes the application intake process:

They are assigned to a counselor and the

Loan Officer will receive an email from the Leads Manager giving them the name & contact information for the counselor.

Loan officer can then follow up with the counselor directly.

Customer does not begin the application process:

2 Weeks: Loan Officer will receive an email from Leads Manager

6 weeks: Loan Officer will receive an email from Leads Manager

HDF will close the file.