Catholic Charities
of the Diocese of Green Bay

Financial Health Program
Homeownership Counseling Checklist

The following items need to be provided to your housing counselor prior to setting appointment:

- [ ] Intake Form (Financial Information) - Catholic Charities online portal
  https://catholiccharitiesgb.fincocms.org/
- [ ] E-home America Certificate of Completion ($99)
  https://ehomeamerica.org/gbdioc
- [ ] Tax Returns
  (most recent copy - please copies only, no originals)
- [ ] Checkstubs
  (most recent 4 stubs)
- [ ] Income Info
  (proof of any additional household income such as child support, SSI/SSDI award letters, etc…)
- [ ] Bank Statement
  (most recent statement for all open accounts)
- [ ] Credit Report
  (dated in past 90 days. Your financial institution may agree to release their copy to Catholic Charities. You are also entitled to a free copy from www.annualcreditreport.org)
- [ ] Loan Estimate
  (if you have applied for a home loan)(you would have received this document from your lender within 3 business days of applying for a home loan.)

** These items may be returned to your housing counselor in any manner: faxed, secure/encrypted email, drop-off, …. Speak to your counselor about your preferred method of providing docs.*

** There is a $100 fee for service which can be made by debit or credit card.* ***After returning all docs, counselor will provide instructions to set appointment and make payment.***

** If you are unable to complete the intake form online, please ask us for the paper form (mailed, emailed, or pick up)*

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