

**FINANCIAL CAPABILITIES WORKSHOP- PERSONAL INTAKE FORM**  
**TALLER DE CAPACIDADES FINANCIERAS -FORMA DE DATOS PERSONALES**

**Primary Client/Solicitante:**

**Please Print/Letra de molde**

Name/Nombre: \_\_\_\_\_  
First/Nombre Middle Initial/Inicial Last/APELLIDO

Address/Domicilio: \_\_\_\_\_  
Street/Calle

City/Ciudad State/Estado Zip/Código Postal

Phone/Telefono: ( ) Cell: ( )

Email/Correo Electronico: \_\_\_\_\_

Date of Birth/Fecha de Nacimiento: \_\_\_\_\_

# Of Co-applicants / # de Co-Solicitantes: \_\_\_\_\_

Total Household size / Tamaño de Familia: \_\_\_\_\_

**How did you hear about this workshop? /Como escucho sobre este taller?**

- Flier/Volante  Radio/Radio  
 Realtor/Agente de bienes raíces  Friend  
 Bank/Banco  I'm a former client/Soy cliente previo  
 Government Agency/Agencia de Gobierno  Social Media/Medio de comunicación social  
 CEDC Staff or Board member/Empleado o miembro del consejo de CEDC  
 Other/Otro: \_\_\_\_\_

**Annual Household Income/Ingreso anual de familia: \$** \_\_\_\_\_

**Current Housing Arrangement/Arreglo actual de vivienda:**

- Homeowner/Dueño de casa  Rent/Renta  Other/Otro

**Race/Raza (please check all that apply/por favor marque todos lo que apliquen)**

- American Indian/Alaskan Native/ *Nativo Americano de Alaska*
- Asian/*Asiatico*
- African American/*Afroamericano*
- Hispanic/*Hispano*
- Native Hawaiian/*Other Pacific Islander/Nativo de Hawaii o Las Islas del Pacifico*
- White/*Blanco*
- Other/*Otro*
- Choose not to respond/*No deseo responder*

**Marital Status/Estado Matrimonial:**

- Single/Soltero
- Married/Casado(a)
- Divorced/Divorciado
- Seperated/Separado(a)
- Widowed/Viudo(a)
- Choose not to respond/No deseo responder

**Highest Level of Education/Nivel más alto de educación:**

- None/Ninguno
- High School/GED/Preparatoria
- College/Título Universitario
- Primary/Primaria
- Vocational/Vocacional
- Junior High/Secundaria
- Junior College/Colegio Comunitario
- Graduate School/Escuela de
- Other/Otro

**Hispanic Ethnicity/Etnia Hispana:**  Yes/Si  No

**Born outside the US/Nacido fuera de los EE.UU.:**  Yes/Si  No

**Veteran/Veterano:**  Yes/Si  No

**Gender/Género:**  Male/Masculino  Female/Femenina

**Active Military/Militar Activo:**  Yes/Si  No

**Head of Household/Cabeza de su hogar:**  Yes/Si  No

**Disabled/Deshabilitado:**  Yes/Si  No

**Disabled Dependent/Dependiente Deshabilitado:**  Yes/Si  No

**Co-Applicant / Co-Solicitante:**

**Please Print / Letra de molde**

Name/Nombre: \_\_\_\_\_  
First/Nombre    Middle Initial/Inicial    Last/Apellido

Address/Domicilio: \_\_\_\_\_  
Street/Calle

City/Ciudad    State/Estado    Zip/Codigo Postal

Phone/Telefono: (\_\_\_\_) \_\_\_\_\_ Cell: (\_\_\_\_) \_\_\_\_\_

Email/Correo Electronico: \_\_\_\_\_ @ \_\_\_\_\_

Date of Birth/Fecha de Nacimiento: \_\_\_\_\_

Gender/Género:    Male/Masculino     Female/Femenina

**Relationship to Applicant/Relacion al Solicitante**

- Spouce/Esposo(a)     Partner/Compañero(a)     Sibling/Hermano(a)  
 Daughter/Son/Hijo(a)     Mother/Father/Madre/Padre     Other/Otro

**Race/Raza (please check all that apply/por favor marque todos lo que apliquen)**

- American Indian/Alaskan Native/ *Nativo Americano de Alaska*  
 Asian/Asiatico  
 African American/Afroamericano  
 Hispanic/Hispano  
 Native Hawaiian/Other Pacific Islander/Nativo de Hawaii o Las Islas del Pacifico  
 White/Blanco  
 Other/Otro  
 Choose not to respond/No deseo responder



PRIVACY POLICY AND PRACTICES OF

Cabrillo Economic Development Corporation

We at Cabrillo Economic Development Corporation – Branch value your trust and are committed to the responsible management, use and protection of personal information. This notice describes our policy regarding the collection and disclosure of personal information. Personal information, as used in this notice, means information that identifies an individual personally and is not otherwise publicly available information. It includes personal financial information and financial debts. It also includes your social security number and other information that you have provided us on any application or forms that you have completed.

Information We Collect

We collect personal information to support our lending operations, financial fitness counseling and to aid you in shopping for and obtaining a home mortgage from a conventional lender. We collect personal information about you from the following sources:

- Information that we receive from you on application forms or other forms,
- Information about your transactions with us, our affiliates or others,
- Information we receive from a consumer reporting agency, and
- Information that we receive from personal and employment references.

Information We Disclose

We may disclose the following kinds of personal information about you:

- Information we receive from you on applications or other forms, such as your name, address, social security number, employer, occupation, assets, debts and income;
- Information about your transactions with us, our affiliates or others, such as your account balance, payment history and parties to your transactions; and
- Information we receive from a consumer reporting agency, such as your credit bureau reports, your credit history and your creditworthiness.

To Whom We Disclose

We may disclose your personal information to the following types of unaffiliated third parties:

- Financial service providers, such as companies engaged in providing home mortgage or home equity loans,
- Others, such as nonprofit organizations involved in community development, but only for program review, auditing, research and oversight purposes.

We may also disclose personal information about you to third parties as permitted by law.

*Prior to sharing personal information with unaffiliated third parties, except as described in this policy, we will give you an opportunity to direct that such information not be disclosed.*

Confidentiality and Security

We restrict access to personal information about you to those of our employees who need to know that information to provide products and services to you and to help them do their jobs, including underwriting and servicing of loans, making loan decisions, aiding you in obtaining loans from others, and financial counseling. We maintain physical and electronic security procedures to safeguard the confidentiality and integrity of personal information in our possession and guard against unauthorized access. We use locked files, user authentication and detection software to protect your information. Our safeguards comply with federal regulations to guard your personal information.

Client Signature/ Firma de Cliente

Client Signature/ Firma de cliente

702 County Square Drive, Ventura, CA 93003 (805) 659-6868





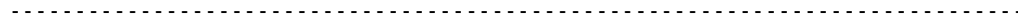
PRIVACY POLICY AND PRACTICES OF

Cabrillo Economic Development Corporation

Directing Us Not to Make Disclosure to Unaffiliated Third Parties

If you prefer that we do not disclose personal information about you to unaffiliated third parties, you may opt out of those disclosures, that is, you may direct us not to make those disclosures (other than disclosures permitted by law).

- If you wish to opt out of disclosures to unaffiliated third parties other than nonprofit organizations involved in community development, you may check Box 1 on the attached Privacy Choices Form.
- If you wish to opt out of disclosures to nonprofit organizations involved in community development that are used only for program review, auditing, research and oversight purposes, you may check Box 2 on the attached Privacy Choices Form.



PRIVACY CHOICES FORM

If you want to opt out, that is, direct us not to make disclosures about your personal information (other than disclosures permitted by law) as described in this notice, check the box or boxes below to indicate your privacy choices. Then send this form to the address listed below.

Box 1 - Limit disclosure of personal information about me to unaffiliated third parties other than non profit organizations involved in community development.

Box 2 - Limit disclosure of personal information about me to nonprofit organizations involved in community development that are used only for program review, auditing, research and oversight purposes.

Name: \_\_\_\_\_

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

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

Phone Number: \_\_\_\_\_

If you have checked any of the boxes above,  
Please mail this form in a stamped envelope to:

Cabrillo Economic Development Corporation  
702 County Square Drive, Ventura, CA 93003

Please allow approximately 30 day from our receipt of your Privacy Choices Form for it to become effective. Your privacy instructions and any previous privacy instructions will remain in effect until you request a change.

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