

Identification #: \_\_\_\_\_

Gender: \_\_\_\_\_ Race: \_\_\_\_\_ Age: \_\_\_\_\_ Highest Education Level: \_\_\_\_\_ Family size: \_\_\_\_\_

**CUSTOMER SURVEY**

**PART 1**

Please read the statements below. For each statement, circle True or False based on your perception of the statement. Please circle the one that best represents how you feel.

- |   |      |       |
|---|------|-------|
| 1. I know how to prepare a budget.                    | TRUE | FALSE |
| 2. My credit score affects my mortgage interest rate. | TRUE | FALSE |
| 3. I am on my own when buying a home.                 | TRUE | FALSE |
| 4. All home loans are the same.                       | TRUE | FALSE |
| 5. Buying a home means weighing wants and needs.      | TRUE | FALSE |

Please read each of the statements below. For each statement, please mark whether you Agree, Disagree, or are Not Sure. Please choose whichever one best represents how you feel.

- |   |       |          |          |
|---|-------|----------|----------|
| 1. I am ready to buy a home.                              | AGREE | DISAGREE | NOT SURE |
| 2. I understand the home buying process.                  | AGREE | DISAGREE | NOT SURE |
| 3. I feel confident working with and selecting a Realtor. | AGREE | DISAGREE | NOT SURE |
| 4. I feel confident selecting a mortgage product.         | AGREE | DISAGREE | NOT SURE |
| 5. I understand the home purchase closing process.        | AGREE | DISAGREE | NOT SURE |

How did you hear about this class?

\_\_\_\_\_  
\_\_\_\_\_

What do you hope to learn today?

\_\_\_\_\_  
\_\_\_\_\_

What is the best way to tell others about this agency's programs: radio, email, twitter, newspaper, community events, etc. \_\_\_\_\_

PART 2

Please read the statements below. For each statement, circle TRUE or FALSE based on your perception of the statement. Please circle the one that best represents how you feel.

- |   |      |       |
|---|------|-------|
| 1. I know how to prepare a budget.                    | TRUE | FALSE |
| 2. My credit score affects my mortgage interest rate. | TRUE | FALSE |
| 3. I am on my own when buying a home.                 | TRUE | FALSE |
| 4. All home loans are the same.                       | TRUE | FALSE |
| 5. Buying a home means weighing wants and needs.      | TRUE | FALSE |

Please read each of the statements below. For each statement, please mark whether you Agree, Disagree, or are Not Sure. Please choose whichever one best represents how you feel.

- |   |       |          |          |
|---|-------|----------|----------|
| 1. I am ready to buy a home.                              | AGREE | DISAGREE | NOT SURE |
| 2. I understand the home buying process.                  | AGREE | DISAGREE | NOT SURE |
| 3. I feel confident working with and selecting a Realtor. | AGREE | DISAGREE | NOT SURE |
| 4. I feel confident selecting a mortgage product.         | AGREE | DISAGREE | NOT SURE |
| 5. I understand the home purchase closing process.        | AGREE | DISAGREE | NOT SURE |

What did you like best about this program?

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What did you like least about this program?

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How can the class be improved?

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Would you recommend this class to others? \_\_\_\_ Yes \_\_\_\_\_ No

Please circle A, B, C, or D:

1. When saving for long term goals, you should save \_\_\_\_\_.  
A. At the end of the month, if you have money left.      B. First.  
C. Whenever you can afford it.      D. None of the above.
2. A monthly budget is a spending plan that allows you to \_\_\_\_\_.  
A. Save for home maintenance and emergencies.      B. Identify wasteful spending.  
C. Pay your bills on time.      D. All of the above.
3. Under Federal law, you have the right to receive a free copy of your credit report every \_\_\_\_\_.  
A. 12 months.      B. 6 months.  
C. 18 months.      D. 24 months.
4. A credit score is \_\_\_\_\_.  
A. Credit grade based on your history of borrowing money      B. Amount of debt you have  
C. Grade from the bank based on their thoughts of you      D. Grade based on your family's history with money
5. The \_\_\_\_\_ details every fee you will likely pay as closing cost.  
A. Truth in Lending Statement      B. Good Faith Estimate  
C. Mortgage Note      D. Real Estate Disclosure
6. In foreclosure \_\_\_\_\_.  
A. The lender can take your home      B. The lender does nothing.  
C. The lender forgives your loan.      D. None of the above.
7. In order to avoid foreclosure, your lender might suggest \_\_\_\_\_.  
A. A payment plan.      B. Loan modification.  
C. Forbearance.      D. All of the above.
8. The housing related expense you can write off on your taxes is \_\_\_\_\_.  
A. Mortgage insurance.      B. Mortgage loan interest.  
C. Property taxes.      D. All of the above.

Please read the statements below. For each statement circle TRUE or FALSE.

1. When writing a spending plan, you should plan according to what your income is now.      TRUE      FALSE
2. In order to obtain a mortgage it is important to have a good credit score.      TRUE      FALSE
3. When you get a quote from a lender, the interest rate they give you is the same as everyone else's.      TRUE      FALSE
4. Predatory mortgage loans usually have low interest and low fees.      TRUE      FALSE
5. Refinancing is taking out a new mortgage and using the money to pay off your current one.      TRUE      FALSE
6. If facing a financial hardship, you have options to prevent foreclosure.      TRUE      FALSE
7. Lenders want foreclosure.      TRUE      FALSE