

Housing Counselor Referral to Community Legal Services

*Please complete and email to your CLS liaison. (You can skip this first page if you print out and attach the intake sheet from your agency that includes all this data.) *Please get your client's permission to discuss their case with us**

Counselor: _____

Agency Name: _____

Phone: _____

Email: _____

Client Information:

Primary Client's Full Name: _____

Date of Birth: ____/____/____

Social Security Number: ____ - ____ - ____

Street Address: _____

Contact phone: _____

Alternate phone: _____

Email: _____

Household Size: Age 18+ _____ Under 18: _____

Total Household income: \$ _____

Income breakdown (optional)

| Source | Person receiving | Monthly Amount |
|--------|------------------|----------------|
|--------|------------------|----------------|

Current Mortgage Servicer: _____

Foreclosure or Tax Docket#: _____

Tangled Title: Relationship to the person on the deed: _____

****Have you submitted an RMA/ workout/ financial application/OOPA?**

If so, please attach the most recent full packet that you sent.

If they got a TPP or denial letter, etc., PLEASE attach a copy if you have it. See Page 3 for additional documents to send that would be very helpful for us to see.

- Summary of circumstances/ why you think CLS should look into this case:

- What outcome does the client want?

Referring Homeowners to Community Legal Services

Community Legal Services (CLS) welcomes referrals from housing counselors of homeowners who need legal representation. Making a complete referral to us using this process will save homeowners hours of waiting in our waiting room during CLS intake times. If you would like CLS to consider representing a homeowner, please talk with us as soon as you see an issue develop. Currently, we consider homeowners for representation biweekly. It is very difficult for us to consider a homeowner for representation on short notice, BUT please call your liaison even if there is a short deadline to discuss options to help save that home.

Unfortunately, the attorneys and paralegals at CLS are not able to represent every homeowner who needs legal representation, but we review every case that comes to us.

If CLS does not accept the case for representation, CLS will provide the counselor with other alternatives about how to resolve the case.

A referral to CLS is never considered a resolution to the case unless CLS communicates in writing to the counselor that the case is being accepted by the unit and counselor services are not required. Typically it is more beneficial to have a partnership with your CLS liaison in the case, if possible.

REMEMBER:

The client must live in the house and have some kind of an ownership interest in the house,
and

Priority is given to low-income households (who can still afford to retain their home.) However, we can review any case you might have questions about even if we don't agree to represent.

Please attach any documents you have that are relevant to the case, including but not limited to:

| <u>Mortgage Cases</u> | <u>Tax Cases</u> | <u>Tangled Title Cases</u> |
|---------------------------------------|--------------------------------------|---------------------------------------|
| <u>Statement</u> | <u>OOPA application</u> | <u>Proof of relationship to owner</u> |
| <u>Act 91/Intent</u> | <u>Old OOPA agreement</u> | <u>Will of owner</u> |
| <u>RMA (submitted or in progress)</u> | <u>Photo ID</u> | <u>Client's birth certificate</u> |
| <u>Denial letters</u> | <u>Utility bill</u> | <u>Owner's death certificate</u> |
| <u>TPP or Mod offer</u> | <u>Denial letters for tax relief</u> | <u>Photo ID</u> |
| | | <u>Any probate documents</u> |