

# Program Disclosure Form

*Note: If you have an impairment, disability, language barrier, or otherwise require an alternative means of completing this form or accessing information about housing counseling, please talk to your housing counselor about arranging alternative accommodations.*

**About Us and Program Purpose:** SouthFair Community Development Corporation (SouthFair) is a nonprofit, comprehensive housing counseling agency. We provide free education workshops and housing counseling that currently includes pre- purchase, non- delinquency post- purchase, and rental counseling. We serve all clients regardless of income, race, color, religion/ creed, sex, national origin, age, family status, disability, or sexual orientation/ gender identity. We administer our programs in conformity with local, state, and federal anti-discrimination laws/ including, the federal Fair Housing Act (42 USC 3600, et seq.). **As a Housing Counseling program participant, please affirm your roles and responsibilities along with the following disclosures and initial, sign, and date the form on the following page.**

Client and Counselor Roles and Responsibilities:

Counselor’s Roles and Responsibilities	Client’s Roles and Responsibilities
<ul style="list-style-type: none"> <li>• Reviewing your housing goal and your finances; which include your income, debts, assets, and credit history.</li> <li>• Preparing a Client Action Plan that lists the steps that you and your counselor will take in order to achieve your housing goal</li> <li>• Preparing household budget that will help you manage your debt, expenses, and savings.</li> <li>• Your counselor is not responsible for achieving your housing goal, but will provide guidance and education in support of your goal.</li> <li>• Neither your counselors nor SouthFair’s employees, agents, or directors may provide legal advice.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Completing the steps assigned to you in your Client Action Plan.</b></li> <li>• <b>Providing accurate information about your income, debts, expenses, credit, and employment.</b></li> <li>• <b>Attending meetings, returning calls, providing requested paper work in a timely matter.</b></li> <li>• <b>Notifying SouthFair or your counselor when changing housing goal.</b></li> <li>• <b>Attending educational workshop(s) (i.e. pre or post purchase counseling workshop) as recommended.</b></li> <li>• <b>Retaining an attorney if seeking legal advice and /or representation in matters such as foreclosure or bankruptcy protection.</b></li> </ul>
<p><b>Termination of Services: Failure to work cooperatively with your housing counselor and/or SouthFair will result in the discontinuation of counseling services. This includes, but is not limited to, missing three consecutive appointments. ___/___ Initials</b></p>	

Agency Conduct: No SouthFair employee, officer, director, contractor, volunteer, or agent shall undertake any action that may result in, or create the appearance of, administering counseling operations for personal or private gain, provide preferential treatment for any person or organization, or engage in conduct that will compromise our agency’s compliance with federal regulations and our commitment to serving the best interest of our clients.

Agency Relationships: SouthFair has professional affiliation with HUD, the City of Dallas, and various lenders. As a housing counseling program participant, you are not obligated to use the products and services of SouthFair or our industry partners.

Alternative Services, Programs, and Products & Client Freedom of choice: SouthFair works with various homebuyer programs and lenders. However, you are not obligated to participate in any programs SouthFair is related to while you are receiving housing counseling, you may consider seeking alternative products and services. You are entitled to choose whatever real estate professionals, lenders, and lending products that best meet your needs.

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Referrals and Community Resources: Upon request, you will be provided a community resource list which outlines various local services available to meet a variety of needs, including utilities assistance, emergency shelter, transitional housing, food banks, and legal aid assistance.

Privacy Policy: I/we acknowledge that I/we received a copy of SouthFair's Privacy Policy.      /      Initials

Errors and Omissions and Disclaimer of Liability: I/we agree SouthFair, its employees, agents, and directors are not liable for any claims and causes of action arising from errors or omissions by such parties, or related to my participation in SouthFair counseling; and I hereby release and waive all claims of action against SouthFair and its affiliates. I have read this document, understand that I have given up substantial rights by signing it, and have signed it freely and without any inducement or assurance of any nature and intend it to be a complete and unconditional release of all liability to the greatest extent allowed by law. If any provision of this document is unenforceable, it shall be modified to the extent necessary to make the provision valid and binding, and the remainder of this document shall remain enforceable to the full extent allowed by law.      /      Initials

Quality Assurance: In order to assess client satisfaction and in compliance with grant funding requirements, SouthFair, or one of its partners, may contact you during or after the completion of your housing counseling service. You may be requested to complete a survey asking to evaluate your client experience. Your survey data may be confidentially shared with SouthFair grantors such as HUD.

I/ we acknowledge that I/ we received, reviewed, and agree to SouthFair's program disclosures.

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Client Name

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Signature

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Date

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Counselor Name

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Signature

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Date