

APPENDIX

H-10: HOMEOWNER QUESTIONNAIRE

FORM 60H-10
(8-14-60)

U. S. DEPARTMENT OF COMMERCE
BUREAU OF THE CENSUS
WASHINGTON 25, D. C.



FORM 60H-10
(8-14-60)
U. S. DEPARTMENT OF COMMERCE
BUREAU OF THE CENSUS
Budget Bureau No. 41-3953.1; Approval Expires December 31, 1960

RESIDENTIAL FINANCING
HOMEOWNER QUESTIONNAIRE - H-10
CENSUS OF HOUSING - 1960

The questions on this form are about the property at the following address:

a. Property address (Location)

b. Segment

c. Unit

d. Mortgage

e. PSU

f. Telephone No.

1. Who is the owner of this property? (If you are buying this property, consider yourself the owner)

Name _____

Address if different from above _____

2. Does the owner live on this property? 1 Yes 2 No

Thank you for your cooperation in providing the information given the Census taker who recently visited your home. In the 1960 Census of Housing we are also collecting information about the financing of owner-occupied properties. This questionnaire is being used to obtain the information needed for a cross section of properties throughout the country.

We would appreciate your cooperation in filling out this questionnaire as completely and accurately as you can. If you do not have exact figures for some questions, estimates will be satisfactory.

This questionnaire should be filled out and mailed within 3 days in the enclosed envelope, which requires no postage.

Sincerely yours,

Robert W. Burgess

Robert W. Burgess
Director
Bureau of the Census

CONFIDENTIAL - The Census is authorized by law (13 U.S.C. 5, 9; 161, 193, 231-4). The law requires that the inquiries be answered completely and accurately, and guarantees that the information furnished will be accorded confidential treatment. The Census report cannot be used for purposes of taxation, investigation, or regulation.

For each type checked "Yes" in column (1) answer the following questions:

(1) Do you have any of the following types of debt relating to this property? (Check "yes" or "no" for each type)	(2) What type of loan is it?	(3) When did you make or assume the loan?	(4) What was the amount of the loan when you made or assumed it?	(5) What are your regular payments on this loan? (Enter dollar and cents)	(6) What does this payment include? (Check one or more boxes)	(7) To whom do you make payments on this loan?
a. First mortgage? <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> FHA mortgage <input type="checkbox"/> VA mortgage (GI loan) <input type="checkbox"/> Other	(Year)	\$	<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Other (Specify)	<input type="checkbox"/> Principal <input type="checkbox"/> Interest <input type="checkbox"/> Real estate taxes <input type="checkbox"/> Property insurance <input type="checkbox"/> Other (Specify)	Name and address
b. Second mortgage? (or second trust?) <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> VA 2nd mortgage <input type="checkbox"/> Other	(Year)	\$	<input type="checkbox"/> None required <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Other (Specify)	<input type="checkbox"/> Principal <input type="checkbox"/> Interest <input type="checkbox"/> Other (Specify)	Name and address
c. Other loans? (Any other mortgage or loan secured to this property such as property improvement loan, personal loan for down payment, etc.) <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Third mortgage <input type="checkbox"/> Property improvement loan <input type="checkbox"/> Other	(Year)	\$	<input type="checkbox"/> None required <input type="checkbox"/> Monthly <input type="checkbox"/> Other (Specify)	<input type="checkbox"/> Principal <input type="checkbox"/> Interest <input type="checkbox"/> Other (Specify)	Name and address

H-10: HOMEOWNER QUESTIONNAIRE

ALL HOME OWNERS ANSWER THE FOLLOWING QUESTIONS

4a. How many dwelling units (family living quarters) are there in this property?.....

Number of dwelling units

b. If this property includes more than one building, list the address of each building and show the number of dwelling units in each building (if property is mortgaged, list all buildings covered by the mortgage)

FOR CENSUS USE

Number of dwelling units	FOR CENSUS USE
	B
	U

1. Street address for each building

2.

3.

4.

5. How much of the floor space on this property is used for business purposes, such as a store, commercial establishment, or rented office?

1 None 2 Less than half 3 Half or more

6. About when was this building originally built?

1 1959 5 1940 - 1949

2 1958 6 1930 - 1939

3 1955 - 1957 7 1929 or earlier

4 1950 - 1954

7. When did you buy, build, or otherwise acquire this building?

Year

8. Was this a new building when you acquired it, or had it been occupied previously?

1 New building 2 Occupied previously

9. When you acquired this building, did you place or assume a mortgage on the property?

1 Placed a new mortgage on the property

2 Assumed a mortgage from former owner

Former owner's name: _____

3 Acquired it free of mortgage

10. If you acquired this building free of mortgage, how was it acquired?

1 All cash - no borrowing

2 By inheritance or gift

3 Borrowed all or part of funds needed

4 In another manner (Describe below)

11. What was the purchase price of this property when you acquired it? (If building was built by you, what were total land and construction costs?) .. \$

12. About how much do you think this property would sell for on today's market?

13. Did the owner (or his wife or husband) ever serve in the Army, Navy, or other Armed Forces of the United States?

Yes No

Was it during:

a. Korean War (June 1950 to Jan. 1955)

b. World War II (Sept. 1940 to July 1947)

c. World War I (April 1917 to Nov. 1918)

d. Any other time, including present service

Space for any notes about entries:

(Check one box on each line)

Yes No

ALL HOMEOWNERS ANSWER THE FOLLOWING QUESTIONS

14. What were your expenses on this property during the PAST 12 MONTHS for the following purposes?

Enter amount or check "None" for each item

Do NOT include any amounts covered by your mortgage payments

Report approximate cost if exact amounts not known

a. Real estate taxes (Include special assessments for street improvements, etc.)

b. Property insurance (Fire, windstorm, etc.) If paid every 3, 6, or 9 years, enter average cost per year.

c. Electricity

d. Gas

e. Oil, coal, wood, or kerosene

f. Water, sewer, trash, etc. (If included in tax bill, check "None")

15. What was the total income of members of this family during the past 12 MONTHS? (If exact figures are not known, give best estimates)

Owner \$ or None

Owner's wife (or husband) \$ or None

(List all owner's relatives 14 years old or older who live here, as son, daughter, etc.)

Also include: Social Security Pensions Veterans payments Rent (minus expenses) Interest Dividends Unemployment insurance Welfare payments

INSTRUCTIONS

Be sure to include for each person listed, all income for the past 12 months from the following:

1. Wages, salary, commissions, or tips (before deductions for taxes, bonds, dues, etc.)

2. Business, professional practice, partnership, or farm income (after deduction of business expenses.)

16. If it is necessary for the Census taker to get in touch with you, what is usually the best time? (Check one or more boxes.)

8 to 12 A.M. 12 to 2 P.M. 5 to 7 P.M. 7 to 9 P.M.

Name of person who filled this form _____ Date _____ Telephone No. _____

f. g. h. i. j. k. l. m.

FOR CENSUS USE

H-12: LENDER QUESTIONNAIRE, LETTER

Form 504-12 (8-22-59)

U. S. DEPARTMENT OF COMMERCE
BUREAU OF THE CENSUS
WASHINGTON 25, D. C.

FOR CENSUS USE		
a. PSU	b. Segment	c. Unit
d. This questionnaire refers to the following property:		
e. Lender's Account No.		
f. Name of current owner (or purchaser)		
g. Name of former owner		

In the 1960 Census of Housing we are collecting information about the financing of residential properties. This questionnaire is being used to obtain the information needed for a cross section of residential properties throughout the country. The property at the address shown above is one of those for which information is required.

The owner of the property informs us that you hold or service a mortgage or similar indebtedness on this property. If you hold or service a first mortgage please fill out the **FIRST MORTGAGE QUESTIONNAIRE** which is attached. If you hold or service a second mortgage (or other junior lien) please complete the **JUNIOR MORTGAGE QUESTIONNAIRE**.

To assist you in identifying this mortgaged property in your records, the name of the current owner is entered above and, when reported, the lender's account number. If the current owner reported that he assumed mortgage payments from a former owner, the former owner's name is also shown.

If your records indicate that you do not currently hold or service any mortgage on this property, please supply the information called for on the reverse side of this letter. This will help us determine the current mortgage status of this property.

Please mail the completed form within 5 days in the enclosed envelope, which requires no postage.

Sincerely yours,

Robert W. Burgess

Robert W. Burgess
Director
Bureau of the Census

P. S. If you have any questions about the form, or if additional blank forms are needed, please write or telephone the Census office at:

Budget Bureau No. 41-5849-1; Approval Expires December 31, 1960

CONFIDENTIAL - The Census is authorized by law (13 U.S.C. 5, 9, 141, 193, 271-4). The law requires that the inquiries be answered completely and truthfully and that the information obtained will be accorded confidential treatment. The Census report cannot be used for purposes of taxation, investigation, or regulation.

INSTRUCTIONS TO LENDER:
Enter information for mortgages held or serviced on attached **QUESTIONNAIRE**. If you do NOT currently hold or service any mortgage on this property, complete the following:

TO: BUREAU OF THE CENSUS:

Concerning the property at the address shown on the reverse, our records indicate:
(Check applicable boxes)

1 We do not have any record of holding or servicing an outstanding mortgage, deed of trust, land contract, contract for deed, or other debt for which the above property is pledged as security.

2 We currently hold or service other indebtedness, **NOT SECURED** by a mortgage on this property, as follows:

Date of loan	Type and purpose of loan (e.g. FHA Title I loan, property improvement loan, collateral loan to finance construction, etc.)
Original amount	
\$	
Balance due	
\$	

3 We formerly held or serviced a mortgage (or similar debt) on this property:
(Check one box):

a For further information on current mortgage status, we suggest you check with:

Name
Address

b Mortgage terminated on _____ with no record of refinancing.
(Date)

Remarks

Signature

Title

Date

H-12a: LENDER QUESTIONNAIRE, FIRST MORTGAGE

Budget Bureau No. 41-5949-1; Approval Expires December 31, 1960

CONFIDENTIAL - The Census is authorized by law (13 U.S.C. 5, 9, 141, 193, 221-4). The law requires that the information be answered completely and accurately, and guarantees that the information furnished will be accorded confidential treatment. The Census report cannot be used for purposes of taxation, investigation, or regulation.

FORM 40H-12a
U.S. DEPARTMENT OF COMMERCE
BUREAU OF THE CENSUS

**RESIDENTIAL FINANCING
FIRST MORTGAGE QUESTIONNAIRE - H-12a
CENSUS OF HOUSING - 1960**

a. PSU _____ b. Segment _____ c. Unit _____

d. This questionnaire refers to the following property: _____

e. Lender's Account No. _____

f. Name of current owner (or purchaser) _____

g. Name of former owner _____

FILL OUT THIS SHEET IF YOU HOLD OR SERVICE A FIRST MORTGAGE ON THE PROPERTY AT THE ABOVE ADDRESS.
The word "Mortgage" as used in this questionnaire includes all forms of debt for which this property or building is pledged as security, such as mortgages, deeds of trust, land contracts, contracts for deed, etc.

Section A - INFORMATION ABOUT FIRST MORTGAGE HELD OR SERVICED

1. Do you
(1) Hold a mortgage?
(2) Service a mortgage for the holder?
a. If you are servicing this mortgage, who is the holder?
Name _____ City _____ State _____ Phone No. (if available) _____

2. Is this mortgage
Check one:
(1) FHA insured?
(2) VA guaranteed or insured?
(3) Conventional? (Not VA guaranteed, not FHA insured)
Month/Year _____

3. When was this mortgage made? (Closed and disbursed) _____
4. What is the term of this mortgage? _____ Years
5. What is the face amount of the mortgage? _____ Dollars
(Mortgage amount when made) _____ Dollars
6. What is the current unpaid balance? _____ Dollars
7. What is the interest rate? _____ % per year

8. What are the REGULAR payments required in connection with this mortgage?
(1) For principal and interest (if paid at same time)
If principal and interest are NOT paid at same time show separately: a. For principal... b. For interest...
(2) For real estate taxes
(3) For property insurance (Fire, windstorm, etc.)
(4) For FHA mortgage insurance premium, if applicable
(5) Other (Specify)
(6) Total payment
Amount (Dollars and cents) _____ Frequency of payment: Monthly _____ Other (Specify) _____

9. What is the present status of the mortgage payments?
(1) Current (or ahead of schedule)
(2) Delinquent
a. If delinquent, how many payments are past due? Payments

INSTRUCTIONS
The questions on this sheet refer only to the FIRST MORTGAGE

If payable "on demand," so state

Do NOT include FHA Mortgage Insurance Premium

Enter amount currently required for each item.

If no payment is required for a "None" in amount column.

If taxes and insurance are combined in one account, enter separate estimate for each.

Check "current," if less than 30 days past due

Continue on Reverse Side

Section A - INFORMATION ABOUT FIRST MORTGAGE HELD OR SERVICED - Continued

10. Indicate type of holder of this mortgage (Check one box)

(1a) Commercial bank or trust company - held for OWN account
(1b) Commercial bank or trust company - held for TRUST account
(2) Mutual savings bank
(3) Savings and loan association (Bldg. and loan, cooperative bank, or homestead association)
(4) Life insurance company
(5) Mortgage company
(6) Real estate or construction company } Check one of these boxes for all firms in mortgage, real estate, or construction business, whether operated by corporation, partnership, or individual
(7) Federal or State agency (FNMA, FHA, VA, State veterans mortgage program, etc.)
(8a) Public and private employee retirement systems (including State and municipal funds), labor unions and union welfare funds
(8b) Philanthropic and educational endowments, foundations and trusts (include any fraternal or nonprofit organizations not listed in item 8a above)
(9) Individual or individual's estate
(10) Other (Specify type) _____

Section B - IF THIS MORTGAGE WAS MADE DURING THE YEARS 1958 OR 1959, ANSWER THE FOLLOWING:
(If this mortgage was made before January 1, 1958, skip to Section C)

11. How did the present holder acquire this mortgage? (Check one box)

(1) ORIGINATED or made directly by present holder
If you check box 1 or 2 do in Section C
(2) ORIGINATED in name of present holder through loan correspondent or agent
(3) PURCHASED by present holder from his loan correspondent
(4) PURCHASED by present holder from any other seller
(5) Other (Describe) _____
Month/Year _____

12. When did the present holder acquire this mortgage?
13. From whom did the present holder acquire this mortgage? (Check one box)
(1) Commercial bank or trust company
(2) Mutual savings bank
(3) Savings and loan association
(4) Life insurance company
(5) Mortgage company
(7) Federal or State agency (Specify name) _____
(10) Other (Specify type) _____
Percent of par _____
14. At what price was this mortgage acquired by the present holder?
(PAR represents the face amount of the mortgage at the time of maturity, OR the outstanding balance if acquired after origination.)
If NO discount or premium involved, check here 100 percent of par

Section C - IDENTIFICATION OF OTHER MORTGAGES HELD OR SERVICED

15. Do you hold or service a second mortgage (or other junior lien) on this property? (Check one box)
1 Yes - (Fill in our attached JUNIOR MORTGAGE QUESTIONNAIRE) 2 No
Space for any notes about other entries

Report prepared by (Sign and initial) _____
Report approved by (Name and title) _____
Date _____

H-12b: LENDER QUESTIONNAIRE, JUNIOR MORTGAGE

Budget Bureau No. 41-5949-1; Approval Expires December 31, 1960

CONFIDENTIAL - The Census is authorized by law (13 U.S.C. 5, 9, 141, 193, 221-4). The law requires that the inquiries be answered completely and accurately, and guarantees that the information reported will be used solely for the purposes of the Census. This information cannot be used for purposes of taxation, investigation, or regulation.

FORM 698-12b
U.S. DEPARTMENT OF COMMERCE
BUREAU OF THE CENSUS
(4-22-59)

JUNIOR MORTGAGE QUESTIONNAIRE - H-12b
CENSUS OF HOUSING - 1960

FOR CENSUS USE

a. PSU _____ b. Segment _____ c. Unit _____

d. This questionnaire refers to the following property: _____

e. Lender's Account No. _____

f. Name of current owner (or purchaser) _____

g. Name of former owner _____

FILL OUT THIS SHEET IF YOU HOLD OR SERVICE A SECOND MORTGAGE (OR OTHER JUNIOR MORTGAGE) ON THE PROPERTY AT THE ABOVE ADDRESS.
The word "Mortgage" as used in this questionnaire includes all forms of debt for which this property or building is pledged as security, such as mortgages, deeds of trust, land contracts, contracts for deed, etc.

Section A - INFORMATION ABOUT JUNIOR MORTGAGE HELD OR SERVICED

INSTRUCTIONS
The questions on this sheet refer only to the JUNIOR MORTGAGE (second mortgage, third mortgage, etc.) which you hold or service.

If payable "on demand," so state

Enter amount currently required for each item.
If no payment is required for a given item write "None" in amount column

Check "current," if less than 30 days past due.

Check one:
1 Hold
2 Service only

Name _____ Phone No. _____ (if available)
City _____ State _____

Check one:
1 VA
2 Conventional

Month/year _____

1. Do you
(1) Hold a mortgage? _____
(2) Service a mortgage for the holder? _____
a. If you are servicing this mortgage, who is the holder?
Name _____
City _____ State _____

2. Is this mortgage
a. VA guaranteed or insured? _____
b. Conventional? (Not VA guaranteed) _____

3. When was this mortgage made? (Closed and disbursed)
Month/year _____

4. What is the term of this mortgage?
(Years from date made to maturity) _____ Years

5. What is the face amount of the mortgage?
(Mortgage amount when made) \$ _____

6. What is the current unpaid balance?
\$ _____

7. What is the interest rate?
% per year _____

8. What are the REGULAR payments required in connection with this mortgage?

Amount (Dollars and cents)	Frequency of payment	
	Monthly	Other (Specify)
\$ _____	<input type="checkbox"/>	_____
\$ _____	<input type="checkbox"/>	_____
\$ _____	<input type="checkbox"/>	_____
\$ _____	<input type="checkbox"/>	_____
\$ _____	<input type="checkbox"/>	_____
\$ _____	<input type="checkbox"/>	_____
\$ _____	<input type="checkbox"/>	_____
\$ _____	<input type="checkbox"/>	_____
\$ _____	<input type="checkbox"/>	_____

(1) For principal and interest (if paid at same time) _____
If principal and interest are NOT paid at same time show separately:
a. For principal _____
b. For interest _____

(2) For other items (Specify):
(a) _____
(b) _____

(6) Total payment _____

9. What is the present status of the mortgage payments?
(1) Current (or ahead of schedule) _____
(2) Delinquent _____
a. If delinquent, how many payments are past due? _____

Check one:
1 Current
2 Delinquent

Payments _____

Section A - INFORMATION ABOUT JUNIOR MORTGAGE HELD OR SERVICED - Continued

10. Indicate type of holder of this mortgage. (Check one box)

(1) Commercial bank or trust company	Check one of these boxes for all items in mortgage, real estate, or construction business whether operated by corporation, partnership, or individual
(2) Mutual savings bank	
(3) Savings and loan association (Bldg. and Loan, cooperative bank, or homestead association)	
(4) Life insurance company	
(5a) Mortgage company - principal business in FIRST mortgages	
(5b) Mortgage company - principal business in JUNIOR mortgages	
(6) Real estate or construction company	
(7) Federal or State agency	
(8) Nonprofit organization	
(9) Individual or individual's estate	
(10) Other (Specify type) _____	

Section B - IF THIS MORTGAGE WAS MADE DURING THE YEARS 1958 OR 1959, ANSWER THE FOLLOWING:
(If this mortgage was made before January 1, 1958, skip to Section C)

11. How did the present holder acquire this mortgage?
(If box 1 in Question 11 is checked, answer the following):

(1) ORIGINATED or made directly by present holder	If you check box 1, skip to Question 14
(2) PURCHASED by present holder	
(3) Other (Describe) _____	

12. When did the present holder acquire this mortgage? _____
Month/year _____

13. At what price was this mortgage acquired by the present holder? ...
(PAR represents the face amount of the mortgage at the time of origination, OR the outstanding balance if acquired after origination.)
If NO discount or premium involved, check here: _____ 100 percent of par

14. Did the present holder of this mortgage formerly own this property?
 Yes No (If "No," skip to Section C)

15. If "Yes," did he take back this mortgage at the time of sale of this property?
 Yes No (If "No," skip to Section C)

16. If "Yes," was he:
(1) The BUILDER who sold this property?
(2) The former owner who OCCUPIED this property as his home?
(3) Neither of the above

Section C - IDENTIFICATION OF OTHER MORTGAGES HELD OR SERVICED

17. Do you hold or service more than one mortgage on this property? (Check one box)
1 Yes - (Fill out separate MORTGAGE QUESTIONNAIRE for each) 2 No

Space for any notes about entries

Report prepared by (Sign or Initial) _____ Report approved by (Name and title) _____ Date _____

FORM 698-12b (4-22-59) PAGE 2 - JUNIOR MORTGAGE QUESTIONNAIRE USC-HM-OC 10010-230