



ASSETS
for ALL
ALLIANCE

EDUCATION WORKSHEET

FOR MYSELF OR OTHER FAMILY MEMBER*

With an Education IDA, you can withdraw matching funds towards:

- Tuition and fees at an accredited institution (post-secondary)
- Books, supplies and equipment required for courses of instruction at eligible educational institutions.
- Computer and software (up to \$1,500 - \$500 from you and \$1,000 from matching funds).

Remember, you can make a withdrawal after six months of saving in the program. All money must be spent by September 15, 2004.

I. Steps to Post-Secondary Education

- My field of study will be _____.
- The career I am working towards is _____.
- I (or my dependent) will go to school at _____.
- I submitted my application and completed all prerequisites. Yes No
- I have talked to those who will be affected by this education goal (my spouse, children, or other significant person). Yes No

II. Preparing to use my IDA for education

- I attended my goal specific seminar. Yes No
- I have completed the required 4 Investor Clubs each year. Yes No
- I will start my program (Start date)_____.
- I will finish my program (Estimated finish date) _____.
- Tuition and fees plus other related expenses will be _____.
(See the attached worksheet if you have not done this.)
- If IDA funds cannot cover all my costs, the rest of my educational expenses will be covered by _____.

III Discussion:

1. What obstacles have you run into?
2. What concerns do you have?
3. Any questions on the use of this asset?

*Family member must be a refugee and a dependent

EDUCATIONAL EXPENSES WORKSHEET

Name of Institution _____

Dates of Attendance: Begin _____ End _____

Number of Quarters/Semesters: _____

Cost per Quarters/Semesters: _____

Total Tuition Cost:
(Number of semesters x cost per semester) _____

Application fees: _____

Other fees (medical, uniforms, etc.) _____

Estimated cost of books and supplies: _____

Computer _____

Software _____

Other supplies? _____

Other _____

TOTAL _____

Amount from IDA _____

Amount needed to be covered by other sources _____