

**An Education Plan
For**

Name

To be submitted to:
The *Tangible Assets*
Individual Development Account Project

Name _____

Street _____

City _____ State _____ Zip _____

Phone () _____

Date _____

Statement of Purpose

Write a short statement describing what your educational goals are.

Part One: Education Plan

- 1. Description of Your Education Plan
- 2. Description of Career Options
- 3. Description of Earning Potential
- 4. Description of the School
- 5. Description of the Courses of Study
- 6. Application and Expected Effect of Savings
- 7. Summary

Part Two: Financial Data

- 1. Description of Sources and Uses of Funding

Part Three: Supporting Documents

Part One: Education Plan

1. Description of Your Education Plan

Give a brief description of why you chose this educational path. Describe where you hope your education will take you in the next three to five years

2. Description of Career Options

Describe the general career options that will be open to you when you complete your education.
List the ways you might be able to use your education.

What are your interests? What do you already know about your career?
Describe your work or volunteer experience in your chosen field.

3. Description of Earning Potential

List specific jobs your education will qualify you to do.		
Organization/Business Name	Job Description	Salary Range

From your research, how will the demand for workers in your field change over the next 3-5 years? Department of Employment and Training or college or high school career centers will have this info.

What else will this job give you besides income? Why do you think this type of career will work for your life style?

4. Description of the School

Name of Institution	
Address	
Phone	
Major	
Type of School	2-year 4-year training graduate vocational technical
Type of Degree	
Years to complete	

5. Description of the Course of Study

Please describe your major area of study and how it fits into your career plan.

6. Application and Expected Effect of Tangible Assets Savings

I will use my IDA savings as follows:

Amount of savings and match \$ _____

I will pay my tuition
(Description) _____ \$ _____

I will pay my fees
(Description) _____ \$ _____

I will purchase books
(Description) _____ \$ _____

I will purchase supplies
(Description) _____ \$ _____

I will purchase equipment
(Description) _____ \$ _____

Describe how this equipment or these supplies will be used in your courses of study

7, Summary

Please summarize your education plan and your career goals.

Part Two: Financial Data

Year One Sources and Uses of Funds

Name	School	Term/Year
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This section shows how much money it will take to get your education going or growing and where that money will come from.

Source:

- | | |
|----------------------------|----------|
| 1. IDA Savings and Match ☺ | \$ _____ |
| 2. Other Savings ☺ | \$ _____ |
| 3. Student loans ☹ | \$ _____ |
| 4. Other loans ☹ | \$ _____ |
| 5. Scholarships ☺ | \$ _____ |
| 6. Grants ☺ | \$ _____ |
| 7. Gifts ☺ | \$ _____ |
| 8. Fellowship ☺ | \$ _____ |

Total \$ _____

Use:

- | | |
|--------------------|----------|
| 1. Tuition | \$ _____ |
| 2. Fees | \$ _____ |
| 3. Books | \$ _____ |
| 4. Supplies | \$ _____ |
| 5. Living expenses | \$ _____ |
| 6. Equipment | \$ _____ |
| 7. Travel | \$ _____ |
| 8. Child care | \$ _____ |

Total \$ _____

Year Two Sources and Uses of Funds

Name _____

School _____

Term/Year _____

This section shows how much money it will take to get your education going or growing and where that money will come from.

Source:

- | | |
|----------------------------|----------|
| 1. IDA Savings and Match ☺ | \$ _____ |
| 2. Other Savings ☺ | \$ _____ |
| 3. Student loans ☹ | \$ _____ |
| 4. Other loans ☹ | \$ _____ |
| 5. Scholarships ☺ | \$ _____ |
| 6. Grants ☺ | \$ _____ |
| 7. Gifts ☺ | \$ _____ |
| 8. Fellowship ☺ | \$ _____ |
| Total | \$ _____ |

Use:

- | | |
|--------------------|----------|
| 1. Tuition | \$ _____ |
| 2. Fees | \$ _____ |
| 3. Books | \$ _____ |
| 4. Supplies | \$ _____ |
| 5. Living expenses | \$ _____ |
| 6. Equipment | \$ _____ |
| 7. Travel | \$ _____ |
| 8. Child care | \$ _____ |
| Total | \$ _____ |

Year Three Sources and Uses of Funds

Name _____

School _____

Term/Year _____

This section shows how much money it will take to get your education going or growing and where that money will come from.

Source:

- | | |
|----------------------------|----------|
| 1. IDA Savings and Match ☺ | \$ _____ |
| 2. Other Savings ☺ | \$ _____ |
| 3. Student loans ☹ | \$ _____ |
| 4. Other loans ☹ | \$ _____ |
| 5. Scholarships ☺ | \$ _____ |
| 6. Grants ☺ | \$ _____ |
| 7. Gifts ☺ | \$ _____ |
| 8. Fellowship ☺ | \$ _____ |
| Total | \$ _____ |

Use:

- | | |
|--------------------|----------|
| 1. Tuition | \$ _____ |
| 2. Fees | \$ _____ |
| 3. Books | \$ _____ |
| 4. Supplies | \$ _____ |
| 5. Living expenses | \$ _____ |
| 6. Equipment | \$ _____ |
| 7. Travel | \$ _____ |
| 8. Child care | \$ _____ |
| Total | \$ _____ |

Year Four Sources and Uses of Funds

Name _____

School _____

Term/Year _____

This section shows how much money it will take to get your education going or growing and where that money will come from.

Source:

- | | |
|----------------------------|----------|
| 1, IDA Savings and Match ☺ | \$ _____ |
| 2. Other Savings ☺ | \$ _____ |
| 3. Student loans ☹ | \$ _____ |
| 4. Other loans ☹ | \$ _____ |
| 5. Scholarships ☺ | \$ _____ |
| 6. Grants ☺ | \$ _____ |
| 7. Gifts ☺ | \$ _____ |
| 8. Fellowship ☺ | \$ _____ |

Total \$ _____

Use:

- | | |
|--------------------|----------|
| 1. Tuition | \$ _____ |
| 2. Fees | \$ _____ |
| 3. Books | \$ _____ |
| 4. Supplies | \$ _____ |
| 5. Living expenses | \$ _____ |
| 6. Equipment | \$ _____ |
| 7. Travel | \$ _____ |
| 8. Child care | \$ _____ |

Total \$ _____

Part Three: Supporting Documents

Attach your letter of acceptance, your school catalogue, course descriptions, and any other documents that you think are important to your plan.