

**Agency Name, Program Name**

**PARTICIPANT MATCHED WITHDRAWAL FORM**

This form should be completed whenever a participant requests approval for a withdrawal.

Date \_\_\_\_\_ Program Officer \_\_\_\_\_

Program Id: \_\_\_\_\_ Site Id: \_\_\_\_\_

Participant Id: \_\_\_\_\_

Participant first name: \_\_\_\_\_

Participant last name: \_\_\_\_\_

Required document checklist:

- A Homeownership Plan.** A written plan that describes the sources and uses of money for the total cost of the home, projected homeownership costs, evidence of an understanding of the benefits, risks and costs of maintaining a home. This plan should be written with the help of the homeownership technical assistance provider.
- Loan Application**
- Competitive, fixed interest rate at 30-year amortization, with no balloon payments.**
- Mortgage Approval**
- Estimated buyer's closing statement**
- Blueprints, materials list, and two (2) professional estimates for home building (if applicable).**
- Relevant bills (home inspection, appraisal, survey, termite, radon, etc.)**
- After closing: Settlement charges**

Intended use of withdrawal: \_\_\_\_\_

Vendor name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: ( \_\_\_\_\_ ) \_\_\_\_\_

Withdrawal date: \_\_\_\_\_

Participant check amount: \$ \_\_\_\_\_

Agency Check Amount: \$ \_\_\_\_\_

Agency Check Number: \_\_\_\_\_

Loan/Mortgage Company: \_\_\_\_\_

Loan Amount: \$ \_\_\_\_\_

Total Participant savings used: \$ \_\_\_\_\_

Total Match funds used: \$ \_\_\_\_\_

Total Value of the Asset Purchased: \$ \_\_\_\_\_

Date Participant received Match Funds Check for Vendor \$: \_\_\_\_\_

Date Participant closed IDA \$: \_\_\_\_\_

Date Program Officer enters successful withdrawal status into MIS: \_\_\_\_\_