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| **Request For MISA Withdrawal** |  |

**I, CMS#** request approval to withdraw funds from MISA Account # for the following purchase outlined in the participant Savings Plan Agreement:

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| **QUALIFYING ASSET OR INVESTMENT:** | **COST** |
| * Postsecondary education and training OR
* Repayment of existing student loan debt accrued for participant’s education
 | $ |
| * Homeownership
* Rental Move-in expenses (may include first and last month’s rent plus deposit)
* Repayment toward an existing home mortgage held by the participant
 | $ |
| * Starting a business including start-up cost, equipment, etc.
* Scaling a business
 | $ |
| * Automobile purchase
* Repayment of existing automobile loan for the primary vehicle of participant’s household
 | $ |
| * Computer purchase
 | $ |
| * Home addition and expansions
 | $ |
| * Assistive technologies
 | $ |
| * Broadband access in rural housing and connectivity costs
 | $ |
| **Exact Amount to be Withdrawn** | $ |
| Other Requirements Met (if applicable)* If qualifying asset has already been purchased, attach documentation
* Personal and Financial Education & Coaching Requirements must be completed (Attached)
 |
| **Justification of Need:*** Copy of Savings Plan Agreement

**Reason for Exceptions or Special Cases (if needed):** |

Vendor\*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Purchase: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone # or email address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**The asset or investment purchase detailed above is approved for funding and/or reimbursement.**

Trainer Approval Executive Approval

**\*(If more than one vendor, complete another form)**

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| **PARTICIPANT FILE CHECKLIST – DOCUMENTATION NEEDED**Vendor Documentation & Location Verification Attached  |
| Payment issued to Vendor:Transfer Documentation attached with transfer date, destination, and amount |
| Payment Issued to Participant:Copy of check to participant, details of fund transfer, deposit receipt showing deposit to participant’s account |
| Exceptions & Special Cases – Small Business or Individuals as Institution or VendorDocument reason for exception and documentation of purchase |