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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| **Exact Amount to be Withdrawn** | $ |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 Vendor  Document reason for exception and documentation of purchase |