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| **Documents*** **Income Eligibility**

**√ EITC/TANF Eligibility** **√ Copy of Eligibility (AFI)****√ Proof of Earned Income*** **Net Worth $10,000<**
* **Earned Income**
* **Verification of**

**√ Citizenship****√ Age****√ NM Resident*** **Best Practice**

 **√ Current ID** **√ SS Card** | **Forms*** **Application**
* **Participation Agreement**
* **Account Open Letter**
* **Self-Advocacy Portfolio**
* **Financial Education**

**√ Completion Certificate*** **Asset Plan**
* **Withdrawal Request**
 | **Action*** **Contact Log**
* **Copy of First Deposit**
* **Quarterly Savings Statements and Match Account Report (14)**
* **Referral to Financial Education**
* **Coaching Documents**
* **Proof of Asset Purchase**
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