

**New Mexico Assets Consortium  
Education Purchase Plan  
IDA Savings Partner**

**Name:** \_\_\_\_\_  
**Date:** \_\_\_\_/\_\_\_\_/\_\_\_\_

**Required information**

**Step One – complete the following information**

1. **Name of School:** \_\_\_\_\_

*(Note: the educational institution needs to be one that falls under the Carl Perkins educational act. See your IDACoach if you have a question about the qualification of your desired school)*

2. **Type of School (Check One):**

- |        |                         |
|--------|-------------------------|
| 2 Year | Graduate                |
| 4 Year | Vocational or Technical |

3. **Type of Degree (Check One):**

- |             |           |
|-------------|-----------|
| Associate   | Bachelors |
| Certificate | Graduate  |

4. **Major or Focus:** \_\_\_\_\_

5. **Future career path:** \_\_\_\_\_

6. **Estimated annual salary:** \_\_\_\_\_

7. **Number Of Credits Required to Graduate:** \_\_\_\_\_

8. **Number Of Credits Completed to Date:** \_\_\_\_\_

9. **Estimated Graduation Date:** \_\_\_\_\_

**Step Two -- Write a purchase plan summary**

- Describe how you will use your IDA money to fund your education.
- Are there other funds that you will use to help you pay for your education (ie: grants, loans, scholarships, or saving)?
- Describe how getting your degree will impact the economic stability of your household.

**Step Three – Research your educational path. Each IDA Savings Partner will need to choose how much research is necessary for their individual success. New students will need more research than current students. Below are some common questions that students have. The information below is recommended to help you succeed at college.**

Questions for new students	Recommended attachments to your asset plan	Completed?
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<ul style="list-style-type: none"> <li>• What are the necessary steps to enrollment (transcripts and references, etc.)?</li> </ul>	Admissions form/packet	
<ul style="list-style-type: none"> <li>• How much does it cost to attend classes?</li> </ul>	Cost of attendance worksheet	
<ul style="list-style-type: none"> <li>• How will I pay for my education?</li> </ul>	Budget developed by IDA Savings Partner	
<ul style="list-style-type: none"> <li>• How will I use my IDA funds to support my education?</li> </ul>	Budget developed by IDA Savings Partner	
<ul style="list-style-type: none"> <li>• What financial aid is available to me?</li> </ul>	Financial aid brochure	
<ul style="list-style-type: none"> <li>• What scholarships are available to me?</li> </ul>	Scholarship applications	
<ul style="list-style-type: none"> <li>• When do classes start? How long do they last? What is the first day that I can register for classes?</li> </ul>	Academic calendar	
<ul style="list-style-type: none"> <li>• What classes do I need to complete to achieve my educational goals?</li> </ul>	Academic plan	
<ul style="list-style-type: none"> <li>• What major is the right major for me?</li> </ul>	Career assessment results	
<b>Questions for current students</b>	<b>Recommended attachments to your asset plan</b>	
<ul style="list-style-type: none"> <li>• How will I use my IDA funds to support my education?</li> </ul>	Budget developed by IDA Savings Partner	
<ul style="list-style-type: none"> <li>• What classes do I need to complete to achieve my educational goals?</li> </ul>	Academic plan	

**Online resources**

Federal Financial Aid Application – [www.fafsa.ed.gov](http://www.fafsa.ed.gov)

Scholarship search engine -- [www.fastweb.com](http://www.fastweb.com)

Occupational Outlook Handbook – to get information about your career and future annual salary  
<http://www.bls.gov/oco/>

**On-campus resources**

Career and vocation planning office

Counseling or advising office

Financial aid and scholarship office

Students with disabilities office

Guided tours

**The attached IDA Purchase Plan is accepted as complete.**

IDA Savings Partner Name: \_\_\_\_\_

IDA Savings Partner signature: \_\_\_\_\_ Date: \_\_\_/\_\_\_/\_\_\_

IDA Coach signature: \_\_\_\_\_ Date: \_\_\_/\_\_\_/\_\_\_

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IDA Savings Partner Name: \_\_\_\_\_