





## PROSPERITY WORKS INDIVIDUAL DEVELOPMENT

### ACCOUNT APPLICATION

**Residential Location at Time of Enrollment:** (Determined by population)

- Minor Urban Area – Albuquerque (metropolitan statistical area with population between 50,000-1,000,000.)  
 Rural Area (less than 50,000)      Remote Area (less than 2,500)

**Household Information:**

For the purposes of the application, a household is defined as a unit financially dependent on each other. If you are financially independent, or living under the same roof as others but keep your finances separate and are filing separate tax forms, you are considered your own household. If this applies to you, you do not need to include the financial information of others that live with you. ***If the number of household members is different on your application vs. your tax form, please attach an explanation.***

List all the people in your household, their age, and relation to you. Indicate if they have monthly income, and if so, please bring their tax information:

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Were you Head of Household on your last tax form?	Yes	No
Number of adults living with you:	_____	
Number of children under 18 years old living with you:	_____	
Total number of household members:	_____	
<b>Anticipated Asset to be Saved For:</b>	<input type="checkbox"/> Home <input type="checkbox"/> Education <input type="checkbox"/> Business <input type="checkbox"/> Unknown	

**Income:**

Enter Your Monthly Earned Income:     I have Earned Income:     Yes     No

	Your monthly gross income before taxes
	Monthly self-employment income ( <i>selling things you make, sewing, child care, etc.</i> )
	Monthly investment income
	Monthly gross income of <b>other</b> members in your household who are currently employed
	Other monthly earned income. This does not include alimony, child support, SSI/SDI, or food stamps.
	<b>Total monthly earned income</b>
	<b>Total Annual Earned Income (monthly amount multiplied by 12)</b>
	<b>What is your adjusted gross income from your last year's tax form?</b>

If you do not currently have Earned Income, by what date are you expecting to have it: \_\_\_\_\_



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Other Income: The following income types are collected for data purposes, but are not used when determining eligibility:

Alimony Payment:      Child Support:      SSI/SSD:      Food Stamps:  
 \$ \_\_\_\_\_      \$ \_\_\_\_\_      \$ \_\_\_\_\_      \$ \_\_\_\_\_

	<b><u>Currently Eligible?</u></b>	<b><u>Currently Receiving?</u></b>	<b><u>Ever Received?</u></b>
<b>TANF:</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>State EITC:</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Federal EITC:</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

**Assets:** Please collect supporting documentation to complete this sheet.

Assets: Do you own the following?	What is the value?	Liabilities?	What is the loan amount that you owe?
Home (that you own)		Mortgage 1 balance	
Second home		Mortgage 2 balance	
<b>All household vehicles must be listed, w/ Kelly Blue Book support docs. (Vehicle 1 assets-value will not be calculated.)</b>			
Vehicle 1		Vehicle 1	
Vehicle 2		Vehicle 2	
Vehicle 3		Vehicle 3	
Residential rental property, or unimproved land		Residential rental property or land debt	
Retirement funds		Past due household bills	
Business Value		Business deb t	
Stocks & bonds, or other Investments		Credit card debt	
Savings account -- not an IDA (if amount different than on statement, please explain)		Student loans	
Checking account (if amount different than on statement, please explain)		Medical bills	
<b>Total Assets</b>		<b>Total Liabilities</b>	



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**THIS SECTION TO BE COMPLETED BY AGENCY STAFF ONLY**

<b>Total Assets</b>	<b>+ \$</b>
<b>Total Liabilities</b>	<b>- \$</b>
<b>Net Worth (Cannot be over \$10,000.00)</b>	<b>= \$</b>

#### **ACKNOWLEDGEMENT, PERMISSION, AND SIGNATURES:**

##### **Personal Data, and Consent for Communication**

I understand that all information I have provided will be treated as confidential. I consent to allow this information to be shared with the IDA administrating organization (Prosperity Works), as necessary, for data collection and reporting, as well as determining eligibility.

**Credit Report/Score:** I agree to allow Prosperity Works to pull my credit report and score at the time I am authorized to open an IDA account -- as well as when I am ready to purchase an asset -- in order to establish a beginning and ending score.

Initials: \_\_\_\_\_

**Custodial Savings Account:** I agree to let Prosperity Works open a custodial savings account in my name.

**Verification of Information:** By signing below, I verify that the information that I have provided is true to the best of my knowledge. I have fully disclosed the financial situation of my household, as well as provided full information on all of my financial accounts. *If I have intentionally provided any incorrect information or am found to be out of compliance with the standards of the initiative, I may be asked to withdraw my participation.*

By signing this, I agree to the above statements.

\_\_\_\_\_  
Participant Printed Name

\_\_\_\_\_  
Participant Signature

Date \_\_\_\_\_



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### PHOTO RELEASE FORM

I hereby grant permission and the right to use my image, likeness, and story without payment, or any other consideration, to Prosperity Works and members of the New Mexico Asset Consortium. I understand that my image and story may be edited, copied, exhibited, published, or distributed, and waive the right to inspect or approve the finished product wherein my likeness appears. Additionally, I waive any right to royalties or other compensation arising from, or related to, the use of my image and story. I also understand that this material may be used in diverse educational settings within an unrestricted geographic area.

Photographs and written materials may be used for the following purposes:

- conference presentations
- educational presentations or courses
- informational presentations
- on-line educational materials

By signing this release I understand this permission signifies that photographs of me may be electronically displayed via the internet or in the public educational setting. I will be consulted about the use of the photographs for any purpose other than those listed above.

There is no time limit on the validity of this release, nor is there any geographic limitation on where these materials may be distributed.

By signing this form, I acknowledge that I have completely read and fully understand the above release and agree to be bound thereby. I hereby release any and all claims against any person or organization utilizing this material for educational purposes.

Full Name \_\_\_\_\_

Street Address/P.O. Box \_\_\_\_\_

City \_\_\_\_\_

State/Zip Code \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

Email Address \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

*If this release is obtained from an individual under the age of 19, the signature of that individual's parent or legal guardian is also required.*

Parent \_\_\_\_\_ Date \_\_\_\_\_