



## Choctaw Asset Building

### 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 IDA Coach 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.**

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

**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

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

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

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