



# OPPORTUNITY PASSPORT™

## ASSET PURCHASE CHECKLIST

All required documentation must be received by the Opportunity Passport™ Coordinator before any funds can be matched. **Reimbursement costs are not eligible for match unless specifically approved by the coordinator.**

If you have any questions, please contact the Opportunity Passport coordinator at 601-460-4436.

VEHICLE	PURCHASES THAT WILL BE MATCHED		PURCHASES THAT WILL NOT BE MATCHED	
	New or used vehicle		Car loan payment	
	First car insurance payment		Non-running vehicles	
	Title and registration fees		Vehicles without clear title	
	Major repairs (costing more than \$250)		Routine vehicle maintenance	
<b>REQUIRED DOCUMENTATION FOR NEW OR USED VEHICLE PURCHASE</b>				
<ul style="list-style-type: none"> <li><input type="checkbox"/> Written description—such as a purchase agreement—including vehicle make, model, year, and VIN, vehicle cost, and from whom it will be purchased</li> <li><input type="checkbox"/> Contact information for the seller</li> <li><input type="checkbox"/> If the vehicle is used, documentation of the vehicle's value</li> <li><input type="checkbox"/> Insurance quote detailing the estimated cost of insurance</li> <li><input type="checkbox"/> Copy of car title with seller's name if purchasing from an individual</li> <li><input type="checkbox"/> Copy of participant's VALID driver's license</li> <li><input type="checkbox"/> Copy of participant's current bank account statement/summary showing funds available for matching</li> <li><input type="checkbox"/> Completed <a href="#">Asset Match Request Form</a></li> </ul>				
<b>REQUIRED DOCUMENTATION FOR MAJOR REPAIRS</b>				
<ul style="list-style-type: none"> <li><input type="checkbox"/> Description of the repair(s) needed (quote/estimate from mechanic)</li> <li><input type="checkbox"/> Proof that vehicle is owned by the participant (copy of title or registration)</li> <li><input type="checkbox"/> Copy of participant's bank statement dated within past 30 days showing funds available for matching</li> <li><input type="checkbox"/> Completed <a href="#">Asset Purchase Request Form</a></li> </ul>				
HOUSING	PURCHASES THAT WILL BE MATCHED		PURCHASES THAT WILL NOT BE MATCHED	
	First month's rent and deposit		Rent payment other than first month	
	Down payment on a house		Insurance for an existing apartment or house	
	Renters/homeowners insurance with a new lease or mortgage (one-time match only)		Informal/temporary living arrangements	
			Roommate's share of rent/deposit	
<b>REQUIRED DOCUMENTATION</b>				
<ul style="list-style-type: none"> <li><input type="checkbox"/> Copy of completed/signed lease or mortgage agreement showing cost of rent and deposit or down payment</li> <li><input type="checkbox"/> Bill or statement of insurance coverage if matching for insurance</li> <li><input type="checkbox"/> Copy of participant's current bank account statement/summary showing funds available for matching</li> <li><input type="checkbox"/> Completed <a href="#">Asset Match Request Form</a></li> </ul>				

# EDUCATION

## PURCHASES THAT WILL BE MATCHED

Tuition, registration, and required fees  
 Course-required text books, supplies, and materials  
 Computer  
 Driver's education/training

## PURCHASES THAT WILL NOT BE MATCHED

Job search expenses

### REQUIRED DOCUMENTATION

- Evidence of enrollment for educational training (acceptance letter, registration confirmation, bill, etc.)
- Copy of class schedule, course packet, and/or syllabus if matching for course textbooks or supplies
- Copy of participant's current bank account statement/summary showing funds available for matching
- Completed [Asset Match Request Form](#)

# HEALTH

## PURCHASES THAT WILL BE MATCHED

Medical and dental expenses not covered by insurance  
 Eye exams, prescription eye glasses, and contact lenses not covered by insurance  
 Participant's share of health insurance premiums, co-pays and deductibles

## PURCHASES THAT WILL NOT BE MATCHED

Over the counter medications  
 Over the counter medical supplies

### REQUIRED DOCUMENTATION

- Copy of invoice, receipt, or Explanation of Benefits (EBO) from insurance indicating patient's portion of total cost
- Quote of costs from medical provider
- Copy of participant's current bank account statement/summary showing funds available for matching
- Completed [Asset Match Request Form](#)

# CREDIT BUILDING

## PURCHASES THAT WILL BE MATCHED

Fees or expenses to remove barriers to opening bank account  
 Legal obligations (tax liens, court fees related to identity theft or credit repair)  
 Credit-builder loan payments  
 Secured credit card payments  
 Bank Certificates of Deposit (CDs), mutual funds, or stocks

## PURCHASES THAT WILL NOT BE MATCHED

Legal obligations, loans or debt payments that do not impact credit score

### REQUIRED DOCUMENTATION

- Explanation from creditor of amount owed, for what, and payment terms (if applicable)
- Description of investment to be purchased from financial institution (if applicable)
- Copy of participant's current bank account statement/summary showing funds available for matching
- Completed [Asset Match Request Form](#)

# MICRO-ENTERPRISE

## PURCHASES THAT WILL BE MATCHED

Fees and expenses associated with opening an appropriate, sustainable small business  
 Proportionate share of start-up expenses if business involves partners

## PURCHASES THAT WILL NOT BE MATCHED

Short-term or inappropriate small businesses  
 Franchise Fees

### REQUIRED DOCUMENTATION

- Copy of business plan (including estimate of up-front expenses and cash flow)
- Evidence of business or entrepreneur training or education (See Opportunity Passport Coordinator for more information)
- Copy of participant's current bank account statement/summary showing funds available for matching
- Completed [Asset Match Request Form](#)