



Individual Development Accounts Education Plan

Student Name: _____

IDA Participant Name: _____

IDA Facilitator Name: _____

1. Information for the school you plan to attend while using IDA funds:

Name of Institution			
City and State			
Major			
Type of School	2-year	4-year	training graduate vocational technical
Type of Degree you plan on obtaining		How long will it take for you to complete this degree?	
Are you currently a student at this institution?	Yes <input type="checkbox"/> No <input type="checkbox"/>	If yes, how long have you attended this institution?	

2. Description of the Course of Study

Please describe your major area of study and how it fits into your career plan.

3. Description of Career Options

Describe the general career options that will be open to you when you complete your education.

4. Financial Information (complete to the best of your ability)

Source of Funds

1. IDA Savings & Match	\$ _____
2. Scholarships	\$ _____
3. Grants	\$ _____
4. Fellowship	\$ _____
5. Other Savings	\$ _____
6. Gifts	\$ _____
7. Student Loans	\$ _____
8. Other Loans	\$ _____
Total	\$ _____

Use of Funds

1. Tuition	\$ _____
2. Fees	\$ _____
3. Books	\$ _____
4. Supplies	\$ _____
5. Living Expenses	\$ _____
6. Equipment	\$ _____
7. Transportation	\$ _____
8. Child Care	\$ _____
Total	\$ _____

This page to be completed by an approved educational advisor

Client has made educated decision regarding institution and area of study

Earnings projection: \$_____ to \$_____

Cost of attendance (use): \$_____

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Financial assistance projection (source): \$_____

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Remaining balance for student: \$_____

Admissions completed

FAFSA completed

Scholarship search review

I verify that I have received and reviewed this education plan with this student. We discussed their education plan for _____ hour(s). ***One hour is the minimum requirement.***

I believe that an IDA account for education is:

Appropriate for this client

Not appropriate at this time for the client

If the IDA is not appropriate at this time, the following steps need to be taken before opening an IDA for education:

1) _____

2) _____

3) _____

4) _____

Additional comments _____

Education Counselor Name: _____

Signature _____ Date: _____