

## OPPORTUNITY PASSPORT ASSET MATCH 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 and checks will be made to the vendor/dealer/landlord.**

Participants must have a legitimate bank account to match. **Please be sure to black out any account numbers or identifying information on documentation prior to submission.**

Suncoast Voices for Children reserves the right to deny any asset match based on it's potential to improve the participant's financial capability. If you have any questions, please contact the Opportunity Passport™ Coordinator at [jjoyner@suncoastvoices.org](mailto:jjoyner@suncoastvoices.org) or 727-254-9608.

VEHICLES	
Purchases that will be matched	Purchases that will not be matched
New or Used Vehicle	Car Loan Payments
First car insurance payment	Non-running Vehicles
Title and Registration fees	Vehicles without clear title
Repairs	Routine vehicle maintenance

**REQUIRED DOCUMENTATION FOR NEW OR USED VEHICLE MATCH:**

- ☐ Purchase agreement - including vehicle make, model, year, VIN, vehicle cost and contact information or seller - see example below
- ☐ If the vehicle is used, documentation of the vehicle's value (Kelley Blue Book)
- ☐ Insurance quote, detailing the estimated cost of insurance
- ☐ Copy of car title with seller's name, if purchasing from an individual
- ☐ Copy of VALID driver's license
- ☐ Copy of bank statement showing funds available *as of the date of the match*
- ☐ Completed Match Request Form

**REQUIRED DOCUMENTATION FOR VEHICLE REPAIRS:**

- ☐ Quote/Estimate from mechanic
- ☐ Copy of Current bank statement/summary showing funds available for matching
- ☐ Completed Match Request Form

## HOUSING

Purchases that will be matched	Purchases that will not be matched
First month's rent on a new apartment	Rent payment other than first month
Down payment on a house	Insurance for an existing apartment or house
Renters/homeowners insurance on a new lease or mortgage (one-time only)	Informal/temporary living arrangements
<b>REQUIRED DOCUMENTATION FOR HOUSING MATCH:</b>  <input type="checkbox"/> Copy of completed/signed lease or mortgage agreement showing cost of rent and deposit/down payment  <input type="checkbox"/> Bill or statement of insurance coverage, if matching for insurance  <input type="checkbox"/> Copy of bank statement showing funds available <i>as of the date of the match</i>  <input type="checkbox"/> Completed Match Request Form	

## EDUCATION

Purchases that will be matched	Purchases that will not be matched
Tuition and fees	Expenses unrelated to seeking a degree, certification or technical training
Course required textbooks and supplies	
Computer	
<b>REQUIRED DOCUMENTATION FOR EDUCATION MATCH:</b>  <input type="checkbox"/> Evidence of enrollment (acceptance letter, registration confirmation, bill, etc)  <input type="checkbox"/> Copy of syllabus or course packet detailing required books/supplies  <input type="checkbox"/> Copy of bank statement showing funds available <i>as of the date of the match</i>  <input type="checkbox"/> Completed Match Request Form	

<b>HEALTH</b>	
<b>Purchases that will be matched</b>	<b>Purchases that will not be matched</b>
Medical or dental expenses not covered by insurance	Over the counter medications
Eye exams, prescription eyeglasses and contact lenses not covered by insurance	
Participant's share of health insurance premiums, co-pays and deductibles	
<b>REQUIRED DOCUMENTATION FOR HEALTH MATCH:</b>	
<input type="checkbox"/> Copy of invoice, receipt, or Explanation of Benefits (EOB) from insurance indicating patient's portion of total cost	
<input type="checkbox"/> Quote of costs from medical provider	
<input type="checkbox"/> Copy of bank statement showing funds available as of the date of the match	
<input type="checkbox"/> Completed Match Request Form	

<b>CREDIT BUILDING</b>	
<b>Purchases that will be matched</b>	<b>Purchases that will not be matched</b>
Fees or expenses to remove barriers to opening a bank account	Regular monthly bills and expenses
Legal obligations (tax liens, court fees, tickets)	
Outstanding debt	
<b>REQUIRED DOCUMENTATION FOR HEALTH MATCH:</b>	
<input type="checkbox"/> Explanation from creditor of amount owed, for what and payment terms	
<input type="checkbox"/> Copy of bank statement showing funds available <i>as of the date of the match</i>	
<input type="checkbox"/> Completed Match Request Form	

<b>SMALL BUSINESS</b>	
<b>Purchases that will be matched</b>	<b>Purchases that will not be matched</b>
Fees or expenses associated with starting an appropriate, sustainable small business	Expenses or equipment for inappropriate or short-term businesses
Business equipment and supplies	
<b>REQUIRED DOCUMENTATION FOR HEALTH MATCH:</b>	
<input type="checkbox"/> Invoice, estimate or receipt documenting purchase	
<input type="checkbox"/> Copy of bank statement showing funds available <i>as of the date of the match</i>	
<input type="checkbox"/> Completed Match Request Form	