

OPPORTUNITY PASSPORT® ASSET MATCH CHECKLIST

All required documentation must be received by the Director of Financial Empowerment before any funds can be matched. **Matches MUST be approved PRIOT to signing a purchase agreement or making a deposit/down payment on an asset. 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 its potential to improve the participant's financial capability. If you have any questions, please contact the Director of Financial Empowerment at jjoyner@suncoastvoices.org or 727-254-9608(call or text).

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
- ☐ 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
- ☐ Copy of VALID driver's license
- ☐ Copy of bank statement showing funds available as of the date of the match
- ☐ Completed [Match Request Form](#)
- ☐ If the vehicle is used, pre-purchase inspection ([Process for Pre-Purchase Car Inspection](#)) - **FINAL STEP and completed only after the above paperwork has been approved!**

REQUIRED DOCUMENTATION FOR VEHICLE REPAIRS:

- ☐ Written quote/estimate from a certified mechanic with a formal place of business
- ☐ 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
REQUIRED DOCUMENTATION FOR HOUSING MATCH: ☐ Copy of completed/signed lease or mortgage agreement showing cost of rent and deposit/down payment ☐ Bill or statement of insurance coverage, if matching for insurance ☐ Copy of bank statement showing funds available <i>as of the date of the match</i> ☐ 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	
REQUIRED DOCUMENTATION FOR EDUCATION MATCH: ☐ Evidence of enrollment (acceptance letter, registration confirmation, bill, etc) ☐ Copy of syllabus or course packet detailing required books/supplies ☐ Copy of bank statement showing funds available <i>as of the date of the match</i> ☐ Completed Match Request Form	

HEALTH

Purchases that will be matched	Purchases that will not be matched
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	
REQUIRED DOCUMENTATION FOR HEALTH MATCH:	
☐ Copy of invoice, receipt, or Explanation of Benefits (EOB) from insurance indicating patient's portion of total cost	
☐ Quote of costs from medical provider	
☐ Copy of bank statement showing funds available as of the date of the match	
☐ Completed Match Request Form	

CREDIT BUILDING

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

SMALL BUSINESS

Purchases that will be matched	Purchases that will not be matched
Fees or expenses associated with starting an appropriate, sustainable small business	Expenses or equipment for inappropriate or short-term businesses
Business equipment and supplies	
REQUIRED DOCUMENTATION FOR HEALTH MATCH:	
☐ Draft of a business plan (template provided upon request)	
☐ Invoice, estimate or receipt documenting purchase	
☐ Copy of bank statement showing funds available <i>as of the date of the match</i>	
☐ Completed Match Request Form	