

Opportunity PassportTM ASSET MATCH CHECKLIST

All required documentation must be received by the Opportunity PassportTM Coordinator before any funds can be matched. Reimbursement costs are not eligible for match unless specifically approved by the coordinator before the purchase is made. 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 PassportTM Coordinator at jjoyner@suncoastvoices.org or 727-254-9608.

<h2>Vehicles</h2>	
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
<p>REQUIRED DOCUMENTATION FOR NEW OR USED VEHICLE MATCH:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Purchase agreement – including vehicle make, model, year, VIN, vehicle cost and contact information of seller – see example below <input type="checkbox"/> If the vehicle is used, documentation of the vehicles value (Kelley Blue Book) <input type="checkbox"/> Insurance quote, detailing the estimated cost of insurance <input type="checkbox"/> Copy of car title with seller's name if purchasing from an individual <input type="checkbox"/> Copy of VALID driver's license <input type="checkbox"/> Copy of current bank statement/summary showing funds available for match <input type="checkbox"/> Completed Match Request Form <p>REQUIRED DOCUMENTATION FOR VEHICLE REPAIRS:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Quote/estimate from mechanic <input type="checkbox"/> Copy of current bank statement/summary showing funds available for matching <input type="checkbox"/> Completed Match Request Form 	
<h2>Housing</h2>	
Purchases that will be matched	Purchases that will not be matched
First month's rent on 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
<p>REQUIRED DOCUMENTATION FOR HOUSING MATCH:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Copy of completed/signed lease or mortgage agreement showing cost of rent and deposit or down payment <input type="checkbox"/> Bill or statement of insurance coverage if matching for insurance <input type="checkbox"/> Copy of current bank statement/summary showing funds available for match <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	

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 current bank statement/summary showing funds available for match
- Completed [Match Request Form](#)

Health

Purchases that will be matched	Purchases that will not be matched
Medical and dental expenses not covered by insurance	Over the counter medications
Eye exams, prescription eye glasses, 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 current bank statement/summary showing funds available for 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 bank account	Regular monthly bills and expenses
Legal obligations (tax liens, court fees, tickets)	
Outstanding debt	

REQUIRED DOCUMENTATION FOR CREDIT BUILDING MATCH:

- Explanation from creditor of amount owed, for what and payment terms
- Copy of current bank statement/summary showing funds available for match
- Completed [Match Request Form](#)

Small Business

Purchases that will be matched	Purchases that will not be matched
Fees and expenses associated with opening and appropriate, sustainable small business	Expenses or equipment for inappropriate or short-term businesses
Business equipment and supplies	

REQUIRED DOCUMENTATION FOR SMALL BUSINESS MATCH:

- Invoice, estimate, receipt documenting purchase
- Copy of current bank statement/summary showing funds available for match
- Completed [Match Request Form](#)

CONTRACT AND BILL OF SALE FOR AUTOMOBILE

_____ ("Seller") agrees to sell to _____ ("Buyer")
the following automobile: [specify make, model and year of car], with Vehicle Identification Number
_____ (the "Vehicle"), pursuant to these terms:

1. The date of the sale of the Vehicle will be _____, 20__.
2. The total purchase price of the Vehicle will be _____ Dollars (\$_____).
3. In exchange for the Vehicle, the Buyer will pay the Seller the total purchase price of the Vehicle on the day of the sale by cashier's check, money order, or cash. [ALTERNATIVE: In exchange for Vehicle, on the day of the sale, Buyer will pay Seller \$_____ by cashier's check, money order, or cash as a down payment for the vehicle and will sign a promissory note for the balance of the total purchase price, which shall be due in full on or before _____.]
4. Upon receipt of payment as provided above, The Seller agrees to provide the following documents to Buyer on the sale date:
 - Certificate of Title (including Odometer Disclosure Section), signed by Seller.
 - The current registration for the Vehicle.
5. The Seller agrees to deliver the Vehicle to Buyer with a current registration and a clear title. Seller warrants that Seller is the legal owner of the Vehicle and that the Vehicle is free of all legal claims, liens, and encumbrances.
6. The Vehicle is sold "as is," and the Seller makes no express or implied warranties as to the condition or performance of the Vehicle, except as follows: to the best of Seller's knowledge, this vehicle:
 - is not a salvage vehicle.
 - has not been declared a total loss by an insurance company.
 - has not been repaired pursuant to the Lemon Law.
7. The Buyer agrees to register the Vehicle in his/her name with the Florida Department of Motor Vehicles within one week of the date of the sale.

[Signature of Seller]

Date: _____

[Phone # of Seller]

[Email of Seller]

[Signature of Buyer]

Date: _____

***OTHER POINTS TO REMEMBER:**

- The Seller should file a Notice of Transfer and Release of Liability with the DMV within 30 days of the sale.
- The Buyer must go to the DMV to complete the transfer of ownership within 30 days of the sale to avoid late transfer penalty fee.