



FSA Education Action Plan

FSA Case Manager: Harriet Gibbs - M- F 9 a.m to 4 p.m. 412-487-6316
 FSA Volunteer: Marleen - 8 am - 10 pm, 412-366-7113
 North Hills Community Outreach, 1975 Ferguson Rd., Allison Park, PA 15101

A. Deposit Approved Plan: \$ _____ every _____ + Lump sum of _____ each 12 months.

My **GOAL DATE** is (exactly 24 months from the date my account is opened) _____.

If a contract change is needed - contact the NHCO office immediately.

B. FSA account: _____ **Direct Deposit is preferred!**
 If I encounter a financial hardship and cannot make my contractual deposit amount, I must contact NHCO immediately. ANY WITHDRAWAL without written authorization is cause for my program termination.

C. Complete Budget and Return to NHCO.

D. Credit Report - Free Report The three nationwide consumer reporting companies have set up one website and toll-free telephone number through which you can order a free report annually. Do not contact the three nationwide consumer reporting companies individually. They are providing free annual credit reports only through 877-322-8228 or www.annualcreditreport.com.

Your Financial Education classes will usually require your credit report to be available to you during classes.
If this box is checked, NHCO sees reason for you to obtain your credit report immediately.

E. Participate in a minimum of 4 hours of Financial Education Classes

Dates: _____ Workshop _____

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Participate in two Electives that cover any range of life management & asset building topics. (Examples: discussing your Financial Plan after budget is submitted, Lowes home improvement, library computer training, etc..)

Date: _____ Elective _____

Date: _____ Elective _____

F. Education Action Plan Worksheet

Estimated Cost of Credits: Use the following formula to estimate the cost of the desired education:

Cost per credit: \$ _____ X # of credits: _____ X 2 semesters = \$ _____ each year

Are you purchasing a TAP 529 Account? _____ Is this for your child/ grandchild? _____

If Educational Plan is for you, please request the Education Action Plan supplemental worksheet.

A copy of this completed Action Plan must be received by your FSA Case Manager prior to receiving Match Money and having Savings released.