

**Michigan IDA Program
Sample A.
Participant Orientation Folder**

Left side of the folder should include the following documents:

- Participant Flow Chart
- Savings Plan Agreement
- Individual Asset Plan
- Release of Liability Form
- Beneficiary Designation Form
- Open Account Authorization Form
- Release of Information Form
- Emergency Withdrawal Request
- Missed Deposit Request

Right side of the folder should include the following documents:

- Participant Q&As
- Financial Institution location information sheet
- Financial Education and Asset-Specific Training Information
- Program Brochure