

# The Pledging Tree Foundation

## TPTF Enrollment Application Form

(Please complete all sections, print, sign, and mail with all evidences to address listed below. Application without the sufficient evidence will not be processed. Due to the sensitive nature of the contents, please do not return via e-mail.)

<b>Date of Application</b>

<b>Selection Notification:</b> <i>(for foundation use only)</i>	<b>Mail Your Application To:</b>
Selected candidate family will be notified by mail.	The Pledging Tree Foundation 3947 West Lincoln Hwy Suite 184 Downingtown PA 19335

### PART A:

Your Information		
First	Middle	Surname(s) / Family Name(s)
Marital Status: <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Single <input type="checkbox"/> Other	No. of children living with you:	Children's Age: <i>(Write all separated with comma)</i>
Home Phone Number	Work Phone Number	Mobile Phone Number <input type="checkbox"/> M <input type="checkbox"/> F
Best Time to Call:	Best Time to Call:	Best Time to Call: Date of Birth
Social Security Number	Current Occupation	Students specify school, level of study E-Mail Address
Your Spouse Information		
First	Middle	Surname(s) / Family Name(s)
Home Phone Number	Work Phone Number	Mobile Phone Number
Does he/she live with you?	Current Occupation	Sex <input type="checkbox"/> M <input type="checkbox"/> F
Current Mailing Address <i>(All information will be sent to this address unless you notify us of a change)</i>		
Address		
City	State/Province	ZIP Code

# The Pledging Tree Foundation

## Eligibility Information

To be eligible for the Pledging Tree Foundation program, applicants must meet all the following criteria:

1. Applicant must be a legal U.S. citizen or permanent resident alien and must be of age 21 or older. Multiple applications from the same household (same street address) will not be accepted. Do you meet this criterion?  Yes  No

2. The household income from all sources must be less than or equal to \$40,000 per annum Do you meet this criterion?  Yes  No.

If yes please attach copy of the followings with your application (Check box to confirm)

Copy of Driver License  Copy of last two pay stubs

Tax Return Forms (1040) from previous year with all schedules attached

## PART B:

### Your Personal Statement

Describe what makes you think that you are the most qualified candidate for enrollment with The Pledging Tree? Use additional pages, if required.

What is your motivation for joining a savings program like The Pledging Tree?

Have you enrolled or are enrolled in any other matching program? If so, please list.

What is your savings goal? (*What is it that you are saving for?*)

- |   |   |
|---|---|
| <input type="checkbox"/> College (529 Plan)                 | <input type="checkbox"/> Retirement (Roth IRA)          |
| <input type="checkbox"/> Buying a house (Savings account)   | <input type="checkbox"/> Buying a car (Savings account) |
| <input type="checkbox"/> Become debt-free (Savings account) | <input type="checkbox"/> Other: (please specify) _____  |

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If enrolled, do you think you can meet the following criteria?

1. Do you intend to save the average amount you saved during the enrollment **after** your enrollment has ended?  
 Yes  No
2. To measure its success, TPTF will require families to share their saving habits for two years after the enrollment period has ended. Are you willing to share your saving habits by sending a copy of your bank statement/investment account summary once a year?  Yes  No
3. Are you willing to adapt and use the methods taught during the financial education training/workshop component of the TPTF?  Yes  No
4. TPTF conducts one financial education training/workshop each quarter. Can you commit to attending at least three of the four sessions during your one-year enrollment?  Yes  No
5. Will you teach your children the same saving habits as you have learned?  Yes  No

What are your expectations from the program and how do you expect to achieve these expectations?

# The Pledging Tree Foundation

## PART C:

### Applicant's Commitment

I, the undersigned applicant for The Pledging Tree Foundation, do hereby agree and certify that if I am selected as a recipient, I will:

- a) Abide by all the rules and guidelines as interpreted by The Pledging Tree Foundation
- b) Pledge to fulfill the long-term disciplined savings for my better future

I also understand that providing a false certification to any of the statements above makes me liable for repayment to the Pledging Tree Foundation for funds received on the basis of this certification. Even if I am selected to participate in the program, I understand that The Pledging Tree Foundation will require me to sign The Pledging Tree Foundations' standard program enrollment documents including, without limitation, a Release and Limitation on Liability Agreement.

**Signature of Applicant**

**Date:**

**Applicant Name, Printed**

## PART D:

### The Pledging Tree Foundation Approval

*For Foundation use only. Applicants do not write anything in this section*

Based on all the eligibility criteria, the following decision has been made:

Approved  Denied

**Approving Authority**

**Date:**

**Chairman, Family Enrollment Selection Committee**