

Enrollment Process

Financially challenged families are identified with the aid of a Selection Committee comprised of The Pledging Tree officers and other independent members from outside organizations. Upon the review of the application by the Selection Committee of The Pledging Tree Foundation, the family's application will be either approved or rejected. If approved, the enrolled family will sign an agreement to abide by all Terms and Conditions outlined in Guideline Document of The Pledging Tree Foundation. Any violations of Terms and Conditions will automatically result in cancellation of enrollment in the Foundation. How to apply: Read and understand the Program Overview section on this web site or in the Guidelines Document. If you are certain that you qualify for the program, follow these steps:

Step 1: Download and complete the Enrollment Application Form Download/View Step 2: Send the completed application form with all the appropriate documentation of eligibility to TPTF at the address mentioned in the form. Step 3: TPTF will review your application and will schedule a telephone interview with you. The process may take up to 1-2 months depending upon the number of applications in the queue.

If your application is approved, you will receive a welcome packet. If your application is rejected, you will receive a regret letter in the mail.

Step 4: Open a new savings account (no checking account) with the banks/credit union listed with the foundation. Once the account has been opened, send the following information/forms to TPTF:

- a. Savings Account Information.
- b. Client Liability Waiver Form (contained in the Welcome Packet) Download/View
- c. Privacy Notice Form (contained in the Welcome Packet) Download/View

Once TPTF receives the information listed above, you will officially be enrolled into the program.

During and After the Enrollment Period:

1. Keep saving every month as much as you can. Read the guidelines on withdrawal of funds.
2. During the first months of enrollment, you will be assigned a financial counselor. You need to schedule meetings with counselor for each quarter. Meet and discuss your financial situation with your counselor. Follow up with recommendations given by the financial counselor.
3. At the end of each quarter, send your bank statements for last three months along with the date and time of your meetings with the counselor.
4. At the end of enrollment period (12 months), TPTF will calculate your savings points and match the funds directly into your bank account. At the end of the enrollment period, TPTF will no longer match your savings however you should keep saving until you achieve your goal.