

Member Application

1. Personal Information

Name: _____
Business Name: _____
Mailing Address: _____ City: _____
State: _____ Zip: _____
Phone: _____ Cell Phone: _____
Fax: _____
Website: _____
Email: _____

2. Please check all that apply to you:

- I have had direct experience as a practitioner designing, establishing, supporting, staffing, or managing an IDA or asset-building initiative.
- I have provided technical assistance (paid or voluntary) to IDA or asset-building initiatives.
- I am currently in the position to provide technical assistance in the IDA or asset building field.
- I am able to provide three professional references who may be contacted to verify my experience.

In addition to supporting the mission and values of the Alliance, we ask potential members to agree to the following principles of membership:

- To use an evaluation tool and process – either your own or one provided by the Assets Alliance – with your clients to allow yourself to reflect on the quality of the services you have provided.
- To engage in the Alliance as a learning community by sharing your insights, experiences, tools, and resources developed as result of providing technical assistance.
- To contribute to the larger enrichment of the IDA and asset building fields.

Signed: _____ Date: _____

3. Which areas do you have skills and experience in:

Check all that apply

- | | |
|---|---|
| <input type="checkbox"/> Strategic Planning | <input type="checkbox"/> Setting up Internal Systems |
| <input type="checkbox"/> Program Development | <input type="checkbox"/> Evaluation & Research |
| <input type="checkbox"/> Board Development | <input type="checkbox"/> Collaboratives & Partnerships Development |
| <input type="checkbox"/> Financial Literacy Training - development and delivery | <input type="checkbox"/> Advocacy & Policy Development |
| <input type="checkbox"/> Information Management Systems | <input type="checkbox"/> Assets for Independence (AFI) Project management |
| <input type="checkbox"/> Fund Development & Grant Writing | |
| <input type="checkbox"/> Program Management & Program Budgeting | |

4. Which of the following asset-building programs and/or organizations have you had experience working with?

- Individual Development Accounts (IDAs) Programs
- Homeownership Training, Homebuyer Counseling and Incentive Programs
- Microenterprise Development, Training and Products
- Earned Income Tax Credit/Free Tax Preparation Initiatives
- Financial Education
- Links to or provision of affordable financial products
- Savings and match programs for children and youth
- Asset protection services/anti-predatory lending initiatives
- Access to public benefits
- Access to retirement benefits (employer-sponsored or otherwise)
- Post-secondary education supports
- Credit counseling/debt management services

5. Which type of organizations do you have experience working with?

- Housing
- Microenterprise Development
- Educational Institution
- Community Action Agency
- Workforce Development
- Faith Based
- Financial Institution
- Foundation
- Community Development Corporation

6. Which Markets do you have experience working with?

- Youth
- Immigrants and/or Refugees
- Urban
- Rural
- Tribal community or reservation
- Faith-based Communities

7. Please attach a brief bio of yourself not to exceed 300 words.

8. Please list three professional references (paid or voluntary experience).

- 1.
- 2.
- 3.

Thank you for your interest in the Assets Alliance.

Please submit your completed membership application to:

Sharon Henderson, Membership Coordinator
PO Box 25152
Albuquerque NM 87125

For membership questions:

Email Sharon at developmentstrategies@msn.com or call (505) 349-4308