



Graduate Information Packet

What Expenses May Be Paid With Account Funds?

- Tuition, Registration and School Fees
- Books and book store purchases
- Equipment required for enrollment and attendance
- Reasonable room and meals (if enrolled at least half-time)
- Travel expenses to/from or around campus
- Uniforms (for military or vocational programs)
- Computer or other required technology

What Expenses Are **NOT** Eligible for Payment With Account Funds?

- Clothes or Shoes
- Personal Grooming
- Fraternity/Sorority Fees
- Cable television
- Non academic related travel
- Room and board for students that live at home or in the home of a relative

How Do I Access My Funds When I Need Them?

- This Graduate Information Packet has the required forms that are needed for you to access your funds.
- Remember: **All funds will be directed to the school of your choice.**

When Must These Funds Be Used?

- All students are required to secure a **social security** number before requesting funds.
- All students must request funds within **two years** after high school graduation or by **age 20**; *whichever comes first.*

What happens if I Do Not Access the Funds within 2 years of High School Graduation or by the Time I Turn 20?

- You will **forfeit** your earnings and the funds will remain in the A-Team program and be will allocated to another A-Team Scholar.





Authorization to Apply Funds

CONGRATULATIONS!

Your scholarship dollars have been maintained in a 529 College Savings Account since you made the A-TEAM. In order to release these funds to your chosen program, please provide the following information:

Student's Name: _____

Birth date: _____ *SSN#: _____ CPS ID# _____

High School: _____ High School Graduation date: _____

Student's Address: _____ Apt #: _____

City: _____ State: _____ Zip: _____

Student's Home Phone: _____ Cell Phone: _____

Student email address: _____

Intended School/Program: _____

School Address: _____

City: _____ State: _____ Zip: _____

School Phone: _____ College ID #: _____

*required to withdraw funds

Once this information is received, the James R. Jordan Foundation will release your scholarship funds to the school you will be attending. If you do not know what school you will be attending at this time, the funds will remain in the interest bearing bank account for two years from your graduation date. If funds are unclaimed after this date, the money will be forfeited.

Please return this form to: **James R. Jordan Foundation**
PO Box 11698
Chicago, Illinois 60611
Fax Number: 312-751-9660

If you have any questions, please call us at 312-751-9696

I acknowledge that I have read, understand, and accept the contents of this letter. I understand that my funds can only be used towards my student account at my intended program of higher education and give permission to the James R. Jordan Foundation to direct the A-Team funds currently held in my 529 college savings account to the school of my choice.

Student Signature

Date

Parent/Guardian of Student (if student is under 18 years of age)

Date





Authorization to

Release

Information

I _____ grant
permission to

Please Print Name

College or University

to release any and all requested information (see below) to the **James R. Jordan Foundation** for the purpose of transferring funds currently held in my interest- bearing account, to the school of my choice.

- Verification of enrollment (note on school letterhead)
- Student ID#
- Address and a contact person for where Scholarship funds are to be sent

STUDENT SIGNATURE

DATE

This authorization shall remain valid for a period of one year from the signed date.

