



# Matched Investment Savings Account (MISA)

## New Account Authorization

Participant Name: \_\_\_\_\_

Participant Address: \_\_\_\_\_

Participant Phone Number: \_\_\_\_\_

SkillSource Authorized Representative: \_\_\_\_\_

SkillSource Representative Address: \_\_\_\_\_

SkillSource Representative Phone Number: \_\_\_\_\_

The individual listed above is approved and eligible to participate in the Matched Investment Savings Account (MISA) program sponsored by SkillSource. In addition to providing the MISA New Account Authorization form at account opening, the participant will provide Columbia Bank with valid identification required to open an account.

Please expect an email from Columbia Bank and a follow up via preferred method of communication notifying you that your account has been successfully opened. It is important to make your first deposit within 30 days of Columbia Bank's notification of account opening.

The participant opening the account must sign this eligibility form authorizing Columbia Bank to release information on his/her MISA account to their SkillSource Authorized Representative. The authorized representative will use the information Columbia Bank provides to monitor the participant's continued eligibility for MISA savings participation and matched funds in order to assist the participant in reaching their savings goals.

The participant recognizes that no funds can be withdrawn from the account without the completed MISA Withdrawal Authorization form signed by an authorized SkillSource representative. The participant must provide the completed withdrawal form to Columbia Bank.

This Authorization is valid until: \_\_\_\_\_ (date)

\_\_\_\_\_  
Signature of Account Owner (Participant)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Date

Approved by: \_\_\_\_\_

(printed name of authorized manager)