

(4) COMMUNICATE REGULARLY WITH THE SERVICE PROVIDER REGARDING THE ACCOUNT.

(B) A SERVICE PROVIDER SHALL:

- (1) RECRUIT AND SELECT ELIGIBLE PROGRAM PARTICIPANTS;
- (2) HELP ELIGIBLE PROGRAM PARTICIPANTS OPEN INDIVIDUAL DEVELOPMENT ACCOUNTS IN FEDERALLY INSURED INSTITUTIONS;
- (3) PROVIDE FINANCIAL LITERACY TRAINING;
- (4) HELP PROGRAM PARTICIPANTS IDENTIFY APPROPRIATE USES FOR THE SAVINGS;
- (5) SOLICIT DONATIONS FROM PRIVATE ENTITIES INCLUDING THE FINANCIAL INSTITUTION AT WHICH THE INDIVIDUAL DEVELOPMENT ACCOUNTS ARE LOCATED FOR THE PURPOSE OF IMPLEMENTING OR ENHANCING THE BENEFITS OF THE PROGRAM;
- (6) MAINTAIN A POOL FUND AN ACCOUNT AT A FEDERALLY INSURED INSTITUTION CONSISTING OF STATE MATCHING FUNDS RECEIVED EACH FISCAL YEAR REPRESENTING THE MATCHED CONTRIBUTIONS FOR PROGRAM PARTICIPANTS UNDER THE SUPERVISION OF THE SERVICE PROVIDER AND ANY PRIVATE DONATIONS RECEIVED BY THE SERVICE PROVIDER FOR THE PURPOSE OF IMPLEMENTING OR ENHANCING THE BENEFITS OF THE PROGRAM;
- (7) AFTER OBTAINING WRITTEN AUTHORIZATION FROM THE PROGRAM PARTICIPANT, SHARE ALL ACCOUNT INFORMATION WITH THE ASSIGNED TECHNICAL ASSISTANCE ORGANIZATION;
- (8) HELP INDIVIDUALS RECEIVE THEIR MATCHING FUNDS AT THE CONCLUSION OF THE PROGRAM AT THE CONCLUSION OF AN INDIVIDUAL'S PARTICIPATION IN THE PROGRAM, PROVIDE THE INDIVIDUAL WITH THE APPROPRIATE LEVEL OF STATE MATCHING FUNDS HELD BY THE SERVICE PROVIDER ON BEHALF OF THE INDIVIDUAL, INCLUDING ANY INTEREST EARNED ON THE MATCHING FUNDS;
- (9) PROVIDE OR IDENTIFY SUPPORTIVE SERVICES TO HELP THE PROGRAM PARTICIPANT REACH THE OUTCOME SELECTED;
- (10) LINK PROGRAM PARTICIPANTS TO OTHER ACTIVITIES THAT FOSTER INDEPENDENCE;
- (11) LIMIT THE NUMBER OF PROGRAM PARTICIPANTS UNDER ITS SUPERVISION TO 150; AND
- (12) PROVIDE OTHER SERVICES NECESSARY FOR THE EFFECTIVE IMPLEMENTATION OF THE PROGRAM.

(C) A THE TECHNICAL ASSISTANCE ORGANIZATION SHALL: