



# Adsystemtech, Inc.

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## **INCOME AND ASSET BUILDING SERVICES** (ASSET FOR INDEPENDENCE, AFI )

Adsystemtech developed the Income and Asset Building module in response to CSBG's Asset for Independence (AFI) program. This module assists clients by giving them the administrative tools necessary to demonstrate and support an assets-based approach for increasing the economic self-sufficiency of low-income individuals and families.

### **KEY POINTS**

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Clients within the AFI program look to enroll customers to save earned income in special-purpose, matched savings accounts called Individual Development Accounts (IDAs). We give clients the ability to track and manage accumulated assets, create goals for customers trying to attain a thriving status as well as track a customer's progress through CaseNotes and Outcome Management. By becoming capable of linking an individual's data back into the program, clients can visually show an individual's progress and direct their IDAs and matching funds towards one of three allowable assets: purchase a first home; capitalize or expand a business; or fund post-secondary education or training.

### **KEY BENEFITS**

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- +Centralized client data entry means unduplicated records, across programs, of families and individuals.
- +Centralized Tracking of Household Demographics, Employment History and Documentation

- +Tracking and management across all domains to financially assess Individuals / Families
- +Automatic determination of customer eligibility based off of data collected on our Household Income Page:
  - +Household adjusted gross income is equal to or less than twice the federal poverty line or within federal Earned Income Tax Credit (EITC) limits; and
  - +Household net worth (excluding primary residence and one vehicle) does not exceed \$10,000 at the end of the last calendar year before the enrollment determination.



## REPORTING TOOLS

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- +Management report tools contain over 50 pre-defined reports that meet the most common organization and regulatory reporting requirements
- +Ad Hoc Query tools gives authorized users the ability to search any Program, Activity and Client information.