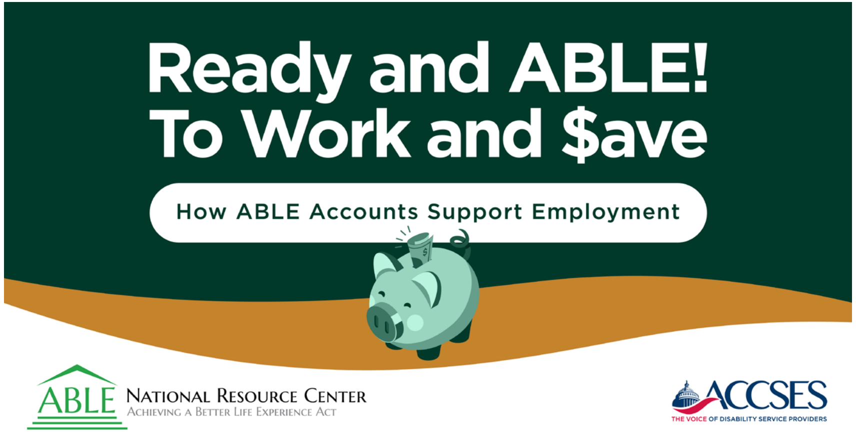
Welcome!

Thank you for joining us today.

Our Ready and ABLE to Work and Save Part 2: Technical Assistance Office Hours will begin momentarily.



ABLE NATIONAL RESOURCE CENTER
ACHIEVING A BETTER LIFE EXPERIENCE ACT

Ready and ABLE to Work and Save

A Two-Part Online Event

Part 2: Thursday, October 19th from 2-3:30pm ET

ABLE National Resource Center is funded through grants from Prudential and JP Morgan Chase.

Listening to the Webinar

The audio for today's meeting can be accessed using Computer Audio or by calling in by phone. If you select Computer Audio, please make sure your speakers are turned on or your headphones are plugged in.

If you do not have sound capabilities on your computer or prefer to listen by phone, dial:

- 1-929-205-6099
- Webinar ID: 849 2904 1023

Captioning

- Real-time captioning is provided during this webinar.
- The captions can be found by clicking on the closed captions icon in your Zoom controls at the bottom of the screen.
- If you do not see the captions after clicking the button, please alert the host via the chat box.

Technical Assistance

- If you experience technical difficulties, please use the chat box to send a message to the NDI Host, or you may email info@ablenrc.org, Subject Line: Webinar Help.

- **Please note:** This webinar is being recorded and the materials will be placed on the ABLE National Resource Center website, along with all other ABLE webinars.

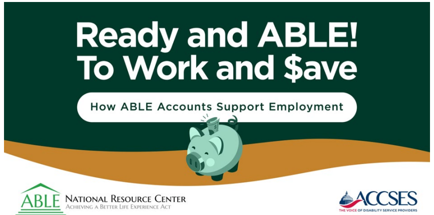
Introduction

Thomas Foley, J.D.
Executive Director, National Disability Institute

OCTOBER IS NATIONAL DISABILITY EMPLOYMENT AWARENESS MONTH (NDEAM)

ABLE National Resource Center
Achieving a Better Life Experience Act

"Ready and ABLE to Work and Save"
A Two-Part Online Event



Tuesday, October 17th from 2-3:30pm ET

Welcome to Part 1 where employers and service providers will get an overview and refresher on ABLE accounts with key employment-related updates, strategies and tools.

Today we will hear from our featured guests and panelists as we zero in on how ABLE accounts can support a more robust workforce that includes working-age people with disabilities saving and investing in an ABLE account.

Thursday, October 19th from 2-3pm ET

In Part 2 of this series, we are offering a "Technical Assistance Office Hour" on ABLE accounts and Employment. This is an opportunity for employers and service providers, who participated in Part 1 of this series to ask questions of our featured guests, panelists, ABLE subject matter experts and work incentives counselors.

Today's Panelists (Slide 1 of 3)

<u>ACCSES –</u>

<u>The Voice of Disability Service Providers</u>

Kate McSweeney, President and CEO of ACCSES

Today's Panelists (Slide 2 of 3)

Kenneth Crum, Chief Operating Officer, Service Source

Missy Crawford-Smith, Community Partner Work Incentive Counselor (CPWIC) and Program Manager, ServiceSource

Today's Panelists (Slide 3 of 3)

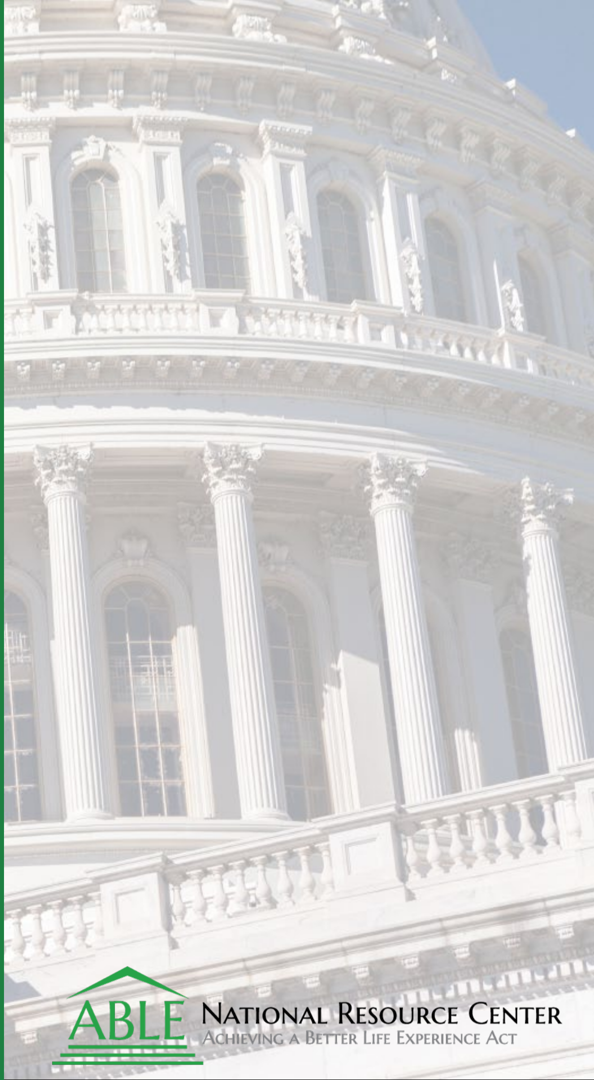
Marlene Ulisky, ABLE Subject Matter Expert, ABLE National Resource Center, National Disability Institute

Laurie Schaller, ABLE Subject Matter Expert, ABLE National Resource Center, National Disability Institute

Questions

- For today’s event we will have the Q&A box opened for our “Technical Assistance Office Hour” on ABLE accounts and Employment.
- This is an opportunity for employers and service providers, who participated in Part 1 of this series to ask questions of our featured panelists and ABLE subject matter experts.

STRATEGIES AND RECOMMENDATIONS



ABLE National Resource Center
Achieving a Better Life Experience Act

Opportunities to Share ABLE Information

Employer

1. When information is provided to the entire workforce annually.
2. When providing information/presentation to the Employee Resource Group.
3. When information is provided as part of the onboarding process.
4. When an employee contacts HR requesting assistance with choosing or changing savings options.

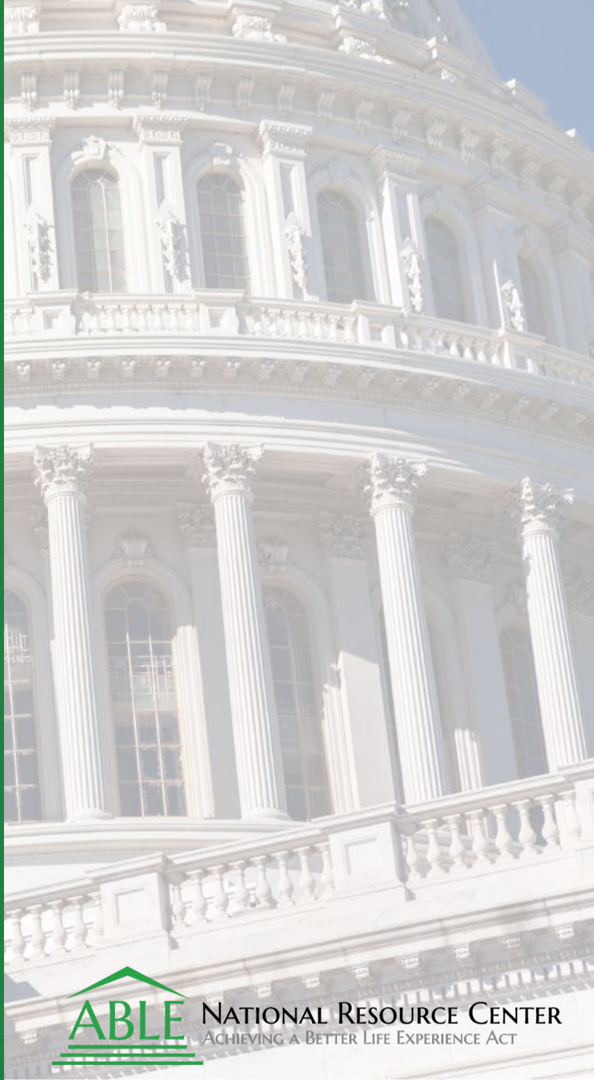
Service Provider

1. When providing counseling during benefits counseling sessions.
2. When conducting periodic "wellness" checks to determine if the employee is progressing without problems.
3. When conducting checks at critical transition points that may be relevant (a promotion, increased or reduced work hours, impending marriage etc.).
4. When preparing Individual Work Plan for Ticket To Work, encouraging regular saving for retirement, and when encouraging employed beneficiaries to file income taxes.

Changes or Options an Employer may offer

1. The option to open an ABLE account.
2. The option to make contributions to the ABLE account; this is taxable income for the ABLE account owner.
3. The option to allow for a portion of wages to be direct deposited into the ABLE account.
4. The option to offer benefits counseling services so that employees are supported in their choices.

ABLE RESOURCES



ABLE Employer and Service Provider Toolkits available for download

- ABLE Employer Toolkit: At the ABLE National Resource Center (ABLE NRC), we make it easy for employers to share and contribute to the financial stability and prosperity of employees impacted by the additional and often significant expenses that can be associated with having a disability.
- ABLE Service Provider Toolkit: The ABLE National Resource Center (ABLE NRC) makes it easy for service providers, case managers and advocates to inform customers, colleagues and peers of ABLE accounts as a protected savings and investment option that does not impact federal benefits.

ABLE Success

ABLE NRC Ambassadors are [ABLE account owners]() and [family members]() who share their success stories to encourage others to open and ABLE account, too.

ABLE Decision Guide Series

[ABLE Decision Guide Series]

- A series of step-by-step guides on key ABLE topics that provide multiple pathways to outcomes.
- Guides help increase ABLE understanding and assist in effective decision making.

ABLE Decision Guides:

- [Am I ABLE Eligible?]
- [Selecting and Opening an ABLE Account]
- [Understanding ABLE Account Savings and Public Benefits]
- [Managing an ABLE Account]
- [Finding Funds to Save in an ABLE Account]
- [Determining Whether Something Is a Qualified Disability Expense]
- [ABLE Accounts and Working People with Disabilities]
- [Ready and ABLE to Work and Save]
- [Understanding ABLE Accounts, Special Needs Trusts and Pooled Trusts]

ABLE National Resource Center Website

Visit ABLE NRC’s website at www.ablenrc.org for:

- ABLE Decision Guides
- ABLE Program Comparison Tools
- ABLE FAQs
- ABLE Account Owners
- ABLE Family Members
- #ABLEtoSave Podcasts
- ABLE Webinars
- AchievABLE Newsletter
- ABLE Toolkits (including Service Provider Toolkit, Employer Toolkit, and Outreach to Communities of Color Toolkit)

Learn More

This 1-page flyer offers a quick overview on ABLE accounts and the resources provided by the ABLE National Resource Center (ABLE NRC)

Scan this QR code to download the flyer to your device.

ABLE National Resource Center
Achieving a Better Life Experience Act

Discover the life-changing power of an ABLE account

An ABLE account can help improve the health, independence and quality of life for millions of eligible individuals with disabilities.

All the ABLE information you need, in one place.

The ABLE National Resource Center (ABLE NRC) is the leading source of objective, independent information about ***ABLE savings accounts*** and federal and state-related ABLE programs.

Founded in 2015 and managed by National Disability Institute (NDI), the ABLE NRC's website is the go-to source for ABLE information for people with disabilities and their families, as well as service providers, financial professionals and more.

ABLE accounts allow eligible individuals to save and invest money, largely without affecting eligibility for public benefits.

Learn about ABLE Accounts
ABLE accounts are tax-free savings and investment accounts for individuals with disabilities so they can save for qualified disability expenses like transportation, healthcare, food, housing, education, retirement and more.

Explore Decision Guides
Our *ABLE Decision Guide Series* can help you make informed choices when selecting, opening and using an ABLE account.

Access Upcoming and On-Demand Webinars
Register for upcoming webinars or watch our collection of On-Demand webinars any time.

Hear from ABLE Experts
The *ABLE to Save Podcast Series* interviews ABLE account holders and family members, and leaders in the public and private sectors, about how ABLE accounts can be an effective savings tool.

"Having an ABLE account gives me a lot of breathing room and a way to save for the long-term, in a life-changing way."
— Simon Cantos, ABLE Account Owner & ABLE NRC Ambassador

EXPLORE THE POWER OF ABLE ACCOUNTS
ablenrc.org

Connect with us: @theABLENRC #ABLEtoSave

Help Spread the Word!

Please share information about ABLE accounts with employees, beneficiaries, friends, family and community groups!

- **To receive up-to-date information on ABLE, please subscribe to our** AchievABLE newsletter.
- Connect with us on social media – **Facebook, and X – @theABLENRC.**

Thank You To
ABLE National Resource Center's Funders

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