

Welcome to NC ABLE



NC ABLE Program Board of Trustees Meeting February 8, 2023

Communications and Outreach Update



NC ABLE
National ABLE Alliance Member



Dale R. Folwell, CPA
STATE TREASURER OF NORTH CAROLINA
DALE R. FOLWELL, CPA

NC ABLE Media & Outreach

- Disability Employment Awareness Month
- Franklin Academy High School
- North Carolina School for the Deaf
- Governor Morehead School + Wake Young Women’s Leadership Academy

Events

- Run/Walk for Autism
- NC State Fair accessABILITY Day
- STEAM Career Showcase
- ECAC Annual Conference
- The Arc of the Triangle Fall Resource Fair
- National Inclusion Project: POWER of PLAY

Webinars

- NC ABLE vs. Special Needs Trusts
- ABLE NRC
- NC DPI Exceptional Children

NC ABLE Accounts & Special Needs Trusts



REID CHISHOLM
Assistant General Counsel
Department of State Treasurer



KARA GANSMANN
Partner, Cranfill Sumner LLP



Treasurer Folwell Recognizes Students’ Designs for NC ABLE at the N.C. School for the Deaf

Highlights NCABLE Program and the Department of State Treasurer While Delivering a Surprise Return of \$4,512.36 in Missing Money to the School’s Administration



NC ABLE
National ABLE Alliance Member



Dale R. Folwell, CPA
STATE TREASURER OF NORTH CAROLINA
DALE R. FOLWELL, CPA

NCABLE.org

[Home](#)[Accounts ▾](#)[Benefits ▾](#)[Eligibility](#)[QDEs](#)[Resources ▾](#)[Board of Trustees](#)[Contact](#)

Webinars & Videos

[Home](#) > [Resources](#) > [Webinars & Videos](#)

NC ABLE Accounts & Special Needs Trusts



People with Disabilities Can Save with NC ABLE



17
Feb
...

FEBRUARY 17, 2023 - FEBRUARY 18, 2023 — RALEIGH, NC

NC CEC 36th Annual Conference- "Renew, Refresh, Refocus"

22
Feb

FEBRUARY 22, 2023

Social Security Benefits and ABLE Accounts Webinar

24
Feb

FEBRUARY 24, 2023

Exceptional Children's Assistance Center (Open to the Public)

28
Feb

FEBRUARY 28, 2023

**Understanding the NC ABLE Program: Basics and Information
(Registration Required)**





In 2023, you can save even MORE in your NC ABLE account, \$17,000!

The IRS raised the annual contribution limit for ABLE accounts to \$17,000 per year. Click here [view this change at IRS.gov](#)

An official website of the State of North Carolina [How you know](#)

Events

Presentation Request

ACCESS My NC ABLE Account



Home

Accounts

Benefits

Eligibility

QDEs

Resources

Board of Trustees

Contact



Opening an NC ABLE account

Here's what you will need to open an NC ABLE Account.

1 Identifying Pieces of Information for the Account Owner

This includes:

If you are opening an account for someone else, you will need

2 Self-Certification for Eligibility

Account Owner's Disability

Basis under which ABLE eligibility is asserted

3 Select your account type(s).

Select your account type and investments. You will select one or more investment option and assign a percentage to each account selected for a total of 100%. Please click below to learn more about the investment options.

CONTACT

nc.clientservice@savewithable.com

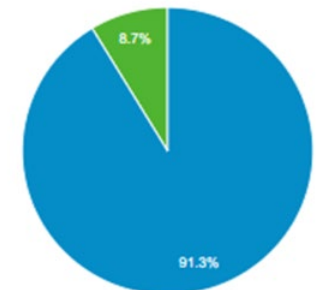
(888) 627-7503

NC ABLE accounts are available for North Carolina residents and eligible individuals throughout the U.S.

RELATED LINKS

• [NC ABLE Enrollment Checklist \(PDF\)](#)

New Visitor Returning Visitor



Top NC Locations *(website visitors)*

Raleigh

Charlotte

Durham

Greensboro

Cary

Winston-Salem

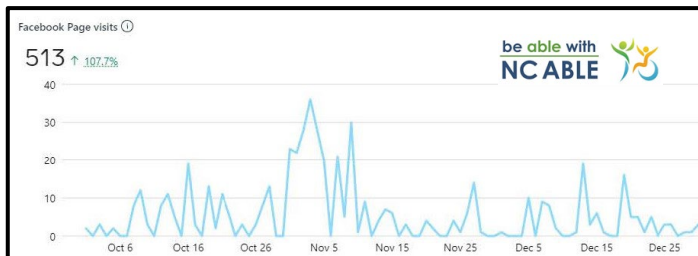
Ashville

Fayetteville

Greenville

Wilmington

Let's Get Social!



#NDEAM

DISABILITY:
PART OF THE **EQUITY EQUATION**
NATIONAL DISABILITY EMPLOYMENT AWARENESS MONTH

12 days of
NC ABLE



NC ABLE Communications Strategy Outline

Goals in support of these Primary Areas of Focus

- **Education through engagement** – Engage the public through effective networking, editorial, social media, and PR placements with the goal to educate potential participants (and their families) about the benefits of ABLE and NC ABLE.
- **Enrollment** – Provide information on the enrollment process and NC ABLE account benefits/features. Dispel misunderstandings and provide information that makes individuals feel comfortable taking action.

Primary Audiences

1. People with disabilities, their families, and guardians
2. Organizations that provide services and supports
3. NC General Assembly
Priority: Public/Media, NC advocacy and membership associations, state and regional community groups, Legislators and their staffs
Secondary: Financial services providers, businesses who provide services and supports, legal services providers

Key messages

1. The NC ABLE Act is one of the most significant pieces of legislation ever passed in NC to support independence for people with disabilities. NC ABLE accounts have the potential to make a real and lasting impact on the financial security of individuals with disabilities, and their families.
2. NC ABLE accounts provide people with disabilities and their families a new opportunity to save and plan for a better economic future and improved quality of life, without losing needed supports from SSI, Medicaid, and other programs. NC ABLE accounts positively impact financial day-to-day challenges *and* provide an opportunity to save for the future.
3. Because North Carolina participates in the National ABLE Alliance, NC ABLE accounts have the benefits of competitive pricing, coupled with high quality institutional investment management. The NC ABLE Program Board of Trustees provides strong oversight of the NC ABLE Program.

Key Collaborations



Special Olympics
North Carolina



Autism Society
of NORTH CAROLINA

National ABLE Alliance



NCCDD
North Carolina Council on
Developmental Disabilities



The Arc
North Carolina



NATIONAL
INCLUSION
PROJECT



Department of Health and Human Services
Division of Vocational Rehabilitation Services



NATIONAL RESOURCE CENTER
ACHIEVING A BETTER LIFE EXPERIENCE ACT



NC ABLE
National ABLE Alliance Member



Dale R. Folwell, CPA
STATE TREASURER OF NORTH CAROLINA
DALE R. FOLWELL, CPA

DISABILITY RIGHTS
NORTH CAROLINA

Champions for Equality and Justice



Thank you



PERSON

Zora Falkowski
Communications Officer
NC ABLE & Supplemental Retirement Plans



EMAIL

Zora.Falkowski@nctreasurer.com



PHONE

919.814.3827



MAIL

3200 Atlantic Avenue
Raleigh, NC 27604



NC ABLE
National ABLE Alliance Member



Dale R. Folwell, CPA
DALE R. FOLWELL, CPA