



NC ABLE Program Board of Trustees Meeting November 12, 2020

Communications and Outreach Update



NC ABLE
National ABLE Alliance Member



Dale R. Folwell, CPA
STATE TREASURER OF NORTH CAROLINA
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Q3 NC ABLE Outreach Highlights

Outreach

Mission Hospital Transition Fair – Webinar

Training

Train the Trainer Webinar Series

Upcoming (this month)

NC Museum of Natural History – STEM virtual fair

Social Media

Continued Foundation of Organic Growth

Web Page on NCTreasurer.com

*Unique visitors have remained consistent,
but there is an increase in time on the page – on average, just over 5 minutes.*

Visitors are viewing benefits and accessing the new NC ABLE Enrollment Checklist.



Communication Highlights

All Videos



NC ABLE Savings Accounts
19 hours ago · 63 Views



NC ABLE celebrates National Financial Awareness Day



NC ABLE Program

Social media continues to grow and have a positive impact in awareness.



ABOUT US **GAIN KNOWLEDGE**

Community partnerships promote the NC ABLE Program on their websites through information pages, links, funding discussions, blogs and webinars.



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NC ABLE ACCOUNT ENROLLMENT CHECKLIST

Enjoy tax-advantaged saving without impacting your current benefits.

Choose options that fit your goals and comfort level.

In about 15 minutes, you can easily open an account online.

[Click here to view helpful videos on enrollment & investment options.](#)

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

- ☐ Name, Address & Date of Birth
- ☐ Social Security Number
- ☐ Bank Account Information (optional)
- ☐ Driver's License, State Issued or Military ID (if selecting a checking account)
- ☐ Identify the basis of eligibility through an easy, online self-certification process.
- ☐ 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 the links below to learn more about the investment options.

[Aggressive Investment Option](#)
[Moderately Aggressive Option](#)
[Growth Option](#)

[Moderate Option](#)
[Moderately Conservative Option](#)
[Checking Option \(debit card included\)](#)
- ☐ How would you like to fund your account? (minimal initial contribution is \$25)

Automatic and regular contributions from your bank account.

 A single deposit from your bank account.

Deposit from my paycheck

 Send a check deposit. (A form will print at the end of the online registration.)
- ☐ Username, password and three security question answers.

If you are a guardian, parent, sibling or authorized person opening an account for someone else, you will need to provide the four identifying pieces of information for you and the account owner. You will also need to upload or mail authorizing documentation.

Open your account at
[nc.savewithable.com](https://www.ncsavewithable.com)
(888) 627-7503

<https://www.nctreasurer.com/divisions/nc-able>



Moving Forward to 2021

Continue to leverage community partnerships

Many will continue the social and virtual plans in place as we move into 2021 and are on schedule to hold in-person, outdoor events by May.

Increase accounts & participation

Promote inclusion and equity for employees with disabilities by targeting North Carolina businesses and encouraging NC ABLE as a part of a new hire 'kit' and a payroll deduction option for NC ABLE contributions.

Partnering with printed and radio media

Focused on Eastern and Western North Carolina

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.

A few of our key collaborators



National ABLE Alliance



Department of Health and Human Services
Division of Vocational Rehabilitation Services



Thank you



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