



be able with  

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NC ABLE



**Achieve a Better Life Experience**

NC ABLE helps individuals save while preserving their SSI and Medicaid.

**NC ABLE Program Board of Trustees Meeting**  
**August 11, 2021**

**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 Outreach Highlights

## Upcoming Outreach this Fall

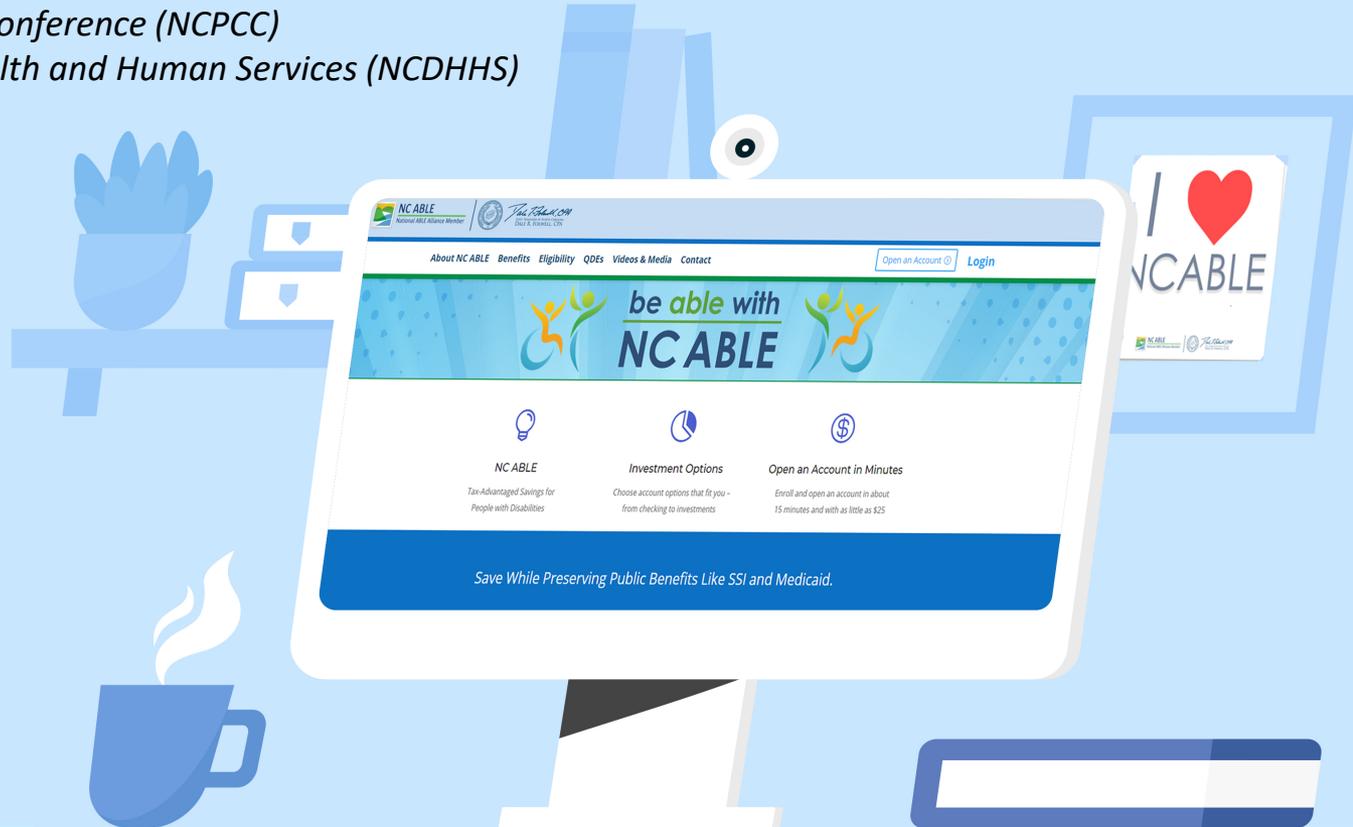
North Carolina Providers Council Conference (NCPCC)  
North Carolina Department of Health and Human Services (NCDHHS)  
NCFASD Informed

## NCABLE.ORG

Website is LIVE!  
This quarter will see a marketing push using digital assets.

## Top Pages Visited

Landing page (Home)  
QDEs  
Videos & Media  
Benefits  
Eligibility  
Contact



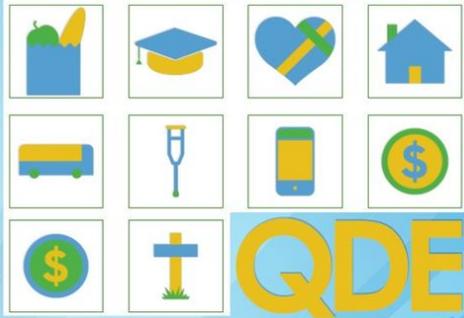
# Communication Highlights



NCABLE.org		
Traffic Source	Direct, Facebook, Instagram, Linked In	Organic Searches
Top Locations	Ashburn, Charlotte, Dublin, Forest City, Henderson, Jacksonville, Lexington, Raleigh	GA, IA, KS, NC, TX, VA
Average Time	4.5 minutes	

NC.SavewithABLE.com	Q2	Q1
# of Users (unique)	3,851 <i>(monthly average: 1,283)</i>	4,309 <i>(monthly average: 1,436)</i>
# of Pageviews	48,271 <i>(monthly average: 16,090)</i>	48,796 <i>(monthly average: 16,265)</i>
Conversion Percentage <i>(Create Account)</i>	16%	18%

# Let's Get Social!



## QDE

Qualified Disability Expenses

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NCABLE



- NCABLE**  
Tax-Advantaged Savings for People with Disabilities
- Investment Options**  
Choose account options that fit you - from checking to investments
- Open an Account in Minutes**  
Enroll and open an account in about 15 minutes and with as little as \$25



## Are you eligible for the NC ABL Program?



Must have a disability or be blind



Disability occurred before age 26

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### NC ABL 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 video on enrollment & investment options.](#)

#### Here's what you will need to open an NC ABL 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)

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.



# 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.

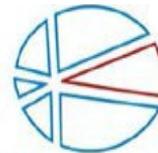
## A few of our key collaborators



*National ABLÉ Alliance*



Department of Health and Human Services  
Division of Vocational Rehabilitation Services



**THE COLLABORATIVE**  
CREATING A CULTURE OF SAVINGS



# Thank you



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