



NC ABLA

National ABLA Alliance Member

Communications and Outreach Update – August 2017





NC ABLE Launch and First Year Rollout – Primary Areas of Focus

Phase I - Program “Soft” Launch – *Jan - June 2017 - complete*

Phase II - Initial Communications and Outreach – *July 2017- June 2018*

Goals in support of these Primary Areas of Focus

- 1) **Education through engagement** – Engage the public through effective networking, with the goal to educate potential participants (and their families) about the benefits of ABLE and NC ABLE.
- 2) **Enrollment** – Provide inform on the enrollment process and NC ABLE account benefits/features. Dispel misunderstandings/ 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



To reach these groups, our activities will target:

Priority:

- Public/Media
- NC advocacy and membership associations, state and regional community groups
- Legislators and their staff

Secondary:

- Financial services providers
- Businesses who provide services and supports



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 extremely competitive pricing coupled with high quality institutional investment management. The NC ABLE Program Board of Trustees provides strong oversight of the NC ABLE Program.



**Fund
your
future.**

**Fund
your
everyday.**



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LEARN MORE

**now
you
can.**

Phase I – Soft Launch Priorities - *complete*

- ✓ Media – Launch release – *January*
- ✓ National ABLE Alliance Press Conference, D.C., featuring National ABLE Consortium state treasurers including Treasurer Folwell and Senator Burr)
- ✓ National Disability Institute and ABLE National Resource Center Webinar – *February*
- ✓ National Disability Institute NC Train the Trainers Webinarsn (4) – *March*
- ✓ Media event at The Enrichment Center announcing checking and debit card features – *April*
- ✓ Creation of NC ABLE communications/outreach materials – digital ads, radio and TV PSAs, print-ready ads, print-ready postcard, banner, educational videos and animations – *June*
- ✓ National Alliance Consortium materials – pamphlet and enrollment brochure – *June*



Phase II - Priorities for Launch and Rollout

Strong support from national and state non-profit partner networks:

- Digital Outreach Toolkit — *Complete*
 - Community outreach/ Presentations (in person or webinars) – Priority focus: Triangle, Statewide organizations, and Train-the-trainer/leadership events – Target = 1-2/month – *Ongoing*
 - Exhibiting and tabling with nonprofit partners and key stakeholders – Priority focus: Triangle, Statewide organizations, and Leadership events – Target = 1-2/month – *Ongoing*
 - Unpaid advertising (via key collaborators' network)
-
- PSAs — *September and ongoing*
 - Social Media – Facebook and Twitter (YouTube) – *Ongoing*
 - Media – in support of OST goals - *Ongoing*



NC ABLE Program Digital Outreach Kit

- ✓ Digital ads
- ✓ Print-ready ads, postcard, brochure
- ✓ Banner (tabling/special events)
- ✓ Video and animation
- ✓ TV and radio PSAs



Digital ads



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Print-ready ads -
(also suitable for digital)



My wife and I are both living with disabilities.
We want to travel to visit family and to continue
our advocacy work for others living with
disabilities. With the NC ABLÉ account,
we can begin to plan for
these expenses.

ADONIS and
CLEMENTINE
Durham, NC

ABLE
stands for Achieving
a Better Life Experience.
The ABLÉ Act allows people with
disabilities and their family members
to save for many daily expenses on a tax-
advantaged basis. It also allows them to invest for
the future. All this without losing needed benefits from
Supplementary Security Income (SSI), SSDI, or Medicaid.

Fund your future. Fund your everyday.
now you can.

For more information, visit [NC.SaveWithABLE.com](https://www.ncsavewithable.com)
or call us at 1-888-627-7503.



NC ABLÉ
National ABLÉ Alliance Member

There's been a constant back and forth between benefits and savings, which is ironic. Before the NC ABLE Act, I kept part of my savings in a shoebox. It was humbling and somewhat humiliating. Now, I can use a NC ABLE account to save and invest. I can use the money for repairing my leg braces which often fail, or I can save to buy a house where the love of my life and I can raise a family.

CHRIS and HEATHER
Chapel Hill, NC

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NC ABLE
National ABLE Alliance Member

Print-ready ads -
(also suitable for digital)

My husband and I are the caregivers and guardians for my brother-in-law Jake who has intellectual and developmental disabilities. We've never been able to save money for him, but with a NC ABLE account, **NOW WE CAN!**

MELINDA, KEVIN
and JAKE
Monroe, NC

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Our daughter who has Down Syndrome, is one of the delights in our life. We want to make sure as she grows and matures, she has as many options possible for independence and expenses. We want to invest in the quality of her life without the risk of losing the benefits she needs from SSI and Medicaid. With a NC ABLE account, now we can!

KELE and ABBAN
with KRISTIN
Seagrave, NC

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NC ABLE
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Postcard



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NC ABLE
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Our daughter, who has Down Syndrome, is one of the delights in our life. We want to make sure as she grows and matures she has as many options possible for independence and happiness. We want to invest in the quality of her life without the risk of losing the benefits she needs from SSI and Medicaid. With a NC ABLE account, **now we can!**
KYLE AND ADRIAN,
parents of KRISTEN
Seagrove, NC

What does an ABLE account mean to people living with disabilities and their families? It means that they can dream and plan and save and invest. For their everyday and their future.

now you can.



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NC ABLE PROGRAM
3200 Atlantic Avenue
Raleigh, NC 27604

Brochure

Individuals living with disabilities, and their families, want to live life to the fullest everyday, just like everyone else!

You want to plan for tomorrow and dream about your future. With a NC ABLE Account — **Now you can.**

A NC ABLE account allows those with disabilities and their family members to save for many daily, disability-related expenses in a tax-deferred account — without the risk of losing benefits from Supplemental Security Income (SSI), Medicaid, and other federal programs.



My husband and I are the caregivers and guardians for my brother-in-law who has intellectual and developmental disabilities. We've never been able to save money for him, but with a NC ABLE account, NOW WE CAN!

MEUNDA AND KEVIN, caregivers for JAKE, Mooresville, NC



The NC ABLE Alliance is a member of the National ABLE Alliance. We are proud to be a part of the effort to ensure that everyone has the opportunity to live life to the fullest.



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What does a NC ABLE account mean to people living with disabilities and their families? It means that they can dream and plan and save and invest. For their everyday and their future.

ACHIEVING A BETTER LIFE EXPERIENCE

Living with a disability can add some difficulties and hurdles in life. Saving and investing should not be one of them.

In 2014, federal legislation known as The Achieving a Better Life Experience (ABLE) Act was passed. It establishes tax-advantaged savings accounts that eligible individuals can use to save funds for qualified everyday expenses — without endangering your eligibility for benefits. It's a way for you to invest in the quality of your life — for everyday and for tomorrow.

The state of North Carolina began offering ABLE accounts in 2017.



Who's Eligible?

- You are eligible for a NC ABLE Account if you are entitled to SSI or SSDI because of your disability and if your disability was present before age 26.

How Do I Open An account?

- ABLE accounts can be opened online only. It's fast and simple. Find out more at NC.SaveWithABLE.com.
- You can open the account yourself, or an authorized guardian or individual can open one in your name.
- When opening an account you will be asked to certify the disability. There is more information about this online and in our Plan Disclosure Documents.

We are living with physical disabilities which present obstacles in our everyday lives. Our quality of life would be better with some renovations to our home, and some adaptive computer equipment. We've never been allowed to save for these things without the risk of losing our benefits, but now with NC ABLE, WE CAN.

ACONKS AND CLEMENTINE Durham, NC

What expenses can I use my ABLE account for?

You can use your NC ABLE account to pay for a variety of expenses related to maintaining your health and independence, and improving your quality of life. You may be surprised how many of your everyday costs qualify as disability-related expenses.

Here are some examples:

- Education (tuition, Special Education services including tutors)
- Health, Prevention and Wellness
- Housing (This includes mortgage and rent payments, property taxes and most costs associated with a house or apartment including property taxes, heating fuel, gas, electricity, water, sewer, and garbage removal)
- Transportation (Purchase a customized accessible vehicle, pay for public transportation to work or school, use Uber or a taxi to get to medical appointments for example.)
- Adaptive equipment
- Assistive technology and related services
- Financial management and administrative services
- Legal fees
- Basic living expenses
- Funeral and Burial



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KYLE AND ADRIAN, parents of Ibtisan Saagwari, NC

PLAN HIGHLIGHTS

TAX ADVANTAGES

- Earnings may compound federally tax-deferred, maximizing the return on your investment.
- Withdrawals are tax-free, if used for qualified disability expenses.*

NO IMPACT ON CURRENT BENEFITS

- Balances up to \$100,000 are excluded from the SSI resource limit.†
- You'll continue to be eligible for Medicaid, regardless of your account balance.‡

Fund your future. Fund your everyday.

now you can.

USER-FRIENDLY

- Open an account online with as little as \$25.
- Access your account 24/7 from a PC, tablet, or other mobile device.
- Access customer service representatives by phone or online.
- Receive monthly statements via email.

INVESTMENT OPTIONS

- NC ABLE has six portfolio options available to meet your needs, based on your unique plans and risk tolerance.
- The checking account offers a debit card for use at point-of-sale retail outlets nationwide.

FOR MORE INFORMATION

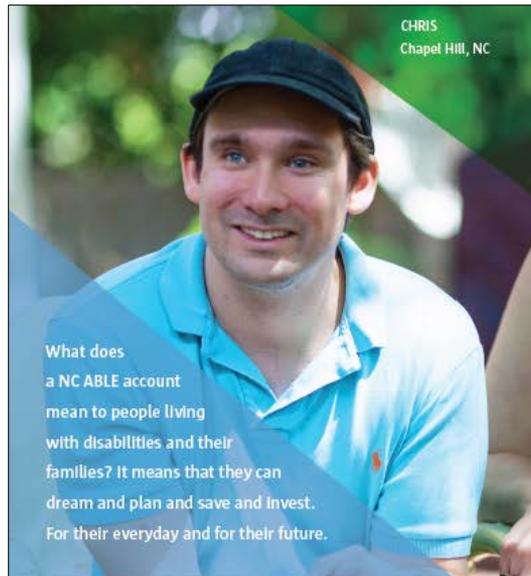


NC.SaveWithABLE.com

1-888-627-7503

nc.clientservice@savewithable.com

Tabling/ Special events banner



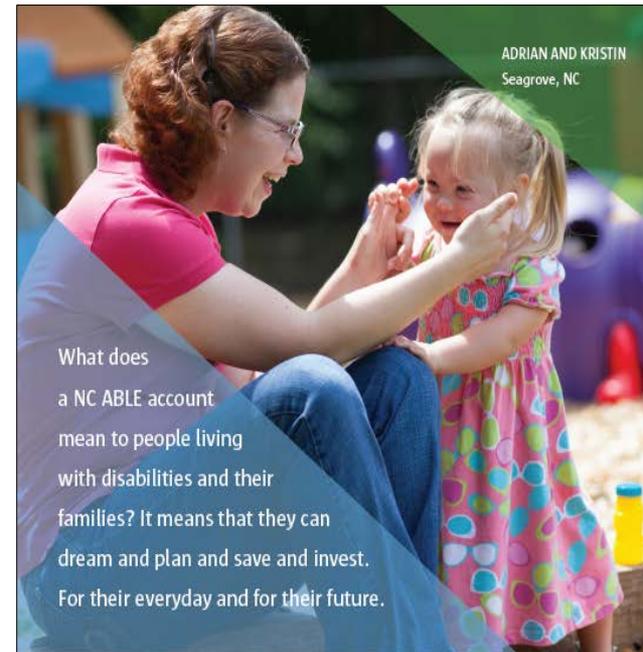
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Videos



[Life-changing NC ABLER Accounts Take Just Minutes To Open \[3-min. overview\]](#)

Plue Family Shares Ease Of Opening An Account

Davis Family Shares How NC ABLER Impacts Their Life (as parents/grandparents)

Plue Family Shares How NC ABLER Impacts Their Life (as guardians)

Animations

Saving and Investing with NC ABLER

Enrolling in NC ABLER

NC ABLE Program Public Service Announcements

[Television Public Service Announcement](#)

20-Second Radio PSA

30-Second Radio PSA



A few of our key collaborators



National ABLÉ Alliance



THE COLLABORATIVE
CREATING A CULTURE OF SAVINGS





NC ABLE Outreach Event Highlights

Joint Intellectual and Developmental Disabilities Caucus

Wake County Human Services

Wake County Division of Mental Health, Developmental Disabilities and Substance Abuse Services

College Foundation of North Carolina

Low Vision Alliance

Triangle Disability Awareness Council

Heritage High Transition Fair

NC Autism Society Annual Conference 2017

NCCDD Americans with Disabilities Act Celebration