



be able with  
**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 February 9, 2022**

**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

- NC ABLE's 5<sup>th</sup>-Year Anniversary – **The POWER of FIVE**
- The ARC of North Carolina
- Weddington Elementary School
- HJ MacDonald Middle School
- Exceptional Children's Assistance Ctr.
- New Website on DST Site Platform

## NC ABLE Media & Outreach

- 4 Press Releases Issued
- National Disability Employment Awareness Month (**#NDEAM**)
- NC State Fair – AccessABILITY Day
- 2021 NC ABLE Newsletter & Account Holder Survey

## NC ABLE Webinars & Q&A

- AB Tech – Project SEARCH
- NCFASD
- NC Brain Injury Association



State Treasurer Dale R. Folwell, CPA Discusses National Disability Employment Awareness Month



## Treasurer Folwell Says Short-Staffed Employers Should Consider Hiring Eager Disabled Workers

*While Visiting UNC-Wilmington He Promotes NC ABLE Program Set Up to Financially Assist I/DD Individuals*



**be . able**  
**NC ABLE**  
Newsletter



**ABLE Accounts Help People With Disabilities Save for the Future**



# Let's Get Social!

Treasurer Folwell is joined by Steve Troxler, North Carolina Commissioner of Agriculture, and David Morken, CEO of Bandwidth, to celebrate the inaugural AccessABILITY Day at the fair, discuss the employment crisis in North Carolina and NC ABLE. #NCABLE #beablewithncable

<https://youtu.be/DjMNBdtpXlg>



Asheville-Buncombe Technical Community College, A-B Tech



ABLE COFFEE CART SCHEDULE			
<b>OCTOBER</b> 10/6 DC 10/13 DC 10/20 DC 10/27 L-Building	<b>NOVEMBER</b> 11/3 DC 11/10 DC 11/17 L-Building 11/24 DC	<b>DECEMBER</b> 12/1 DC 12/8 L-Building 12/15 DC	<b>JANUARY</b> 1/12 DC 1/19 DC 1/26 L-Building
<b>FEBRUARY</b> 2/2 DC 2/9 DC 2/16 DC 2/23 L-Building	<b>MARCH</b> 3/2 DC 3/9 DC 3/23 L-Building 3/30 DC	<b>APRIL</b> 4/6 DC 4/13 DC 4/20 DC 4/27 L-Building	<b>MAY</b> 5/4 DC 5/11 DC 5/18 DC 5/25 L-Building
<b>JUNE</b> 6/1 DC 6/8 DC 6/15 DC 6/22 L-Building 6/29 DC	<b>JULY</b> 7/6 DC 7/13 DC 7/20 DC 7/27 L-Building	<b>AUGUST</b> 8/3 DC 8/10 DC 8/17 DC 8/24 L-Building 8/31 DC	<b>SEPTEMBER</b> 9/7 DC 9/14 DC 9/21 DC 9/28 L-Building



Results

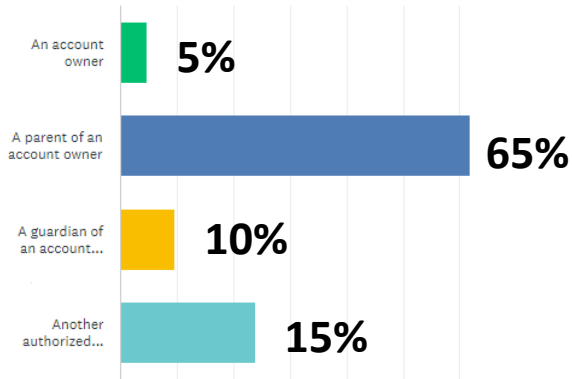
Facebook Page Reach 1

2,392 ↑ 67%



## Initial Survey Results

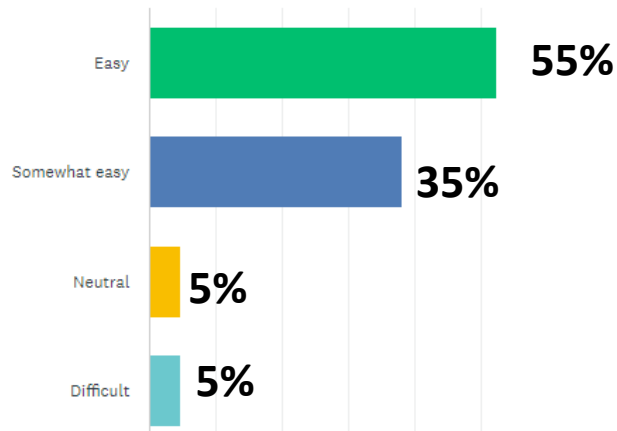
### Who took the survey?



### How did you learn about the NC ABLE Program?

- Friend, family or other account holder
- Event
- Service provider (social worker or agency)
- Website
- National Alliance
- Special Needs Financial Planner
- Internet Search
- Newspaper Article

### How easy was the enrollment process?



### How did you enroll in the NC ABLE Program?

- Online 90%
- Paper Form 10%
- Phone 0%

If a financial advisor was available to assist with your investment selection, would you be willing to pay for that service? NO, 100%

# Initial Survey Results

## What, if anything, would you change about the NCABLE Program?

The **fees are very high**. They are eating up the small amount of money I am able to save.

Provide monthly reporting of account performance.

The **fees** on a simple checking account **are outrageous!**

Nothing, NC ABLE works perfect for my needs.

**Lower fees.** The **transfer of funds is too long.**

The checking option carries **expensive fees** that I think should be reduced after a certain balance.

It is absurd that in the year 2022 we have to fax withdrawal forms. Why can you not accept scanned copies via email? What's the difference between a scanned attachment and a fax?

Bank **fee is way more** than interest earned.

Allow multiple debit cards with the checking option. Provide more convenient deposit options to checking account.

Offer more info to account holder about if I need to declare having an ABLE acct.

Being able to transfer funds from investment savings into checking without having to "rebalance" account (just sell portion of investment holdings and transfer proceeds into cash account). **Ability to make transfers more than twice per year.**

**Shorten the time between** requesting a **withdrawal and actual disbursement of funds.**

## I'd like to learn more about:

Investment choices.

What are the reporting requirements of having an ABLE account for public programs in North Carolina.

How to transfer responsibility for the account to another guardian when I am no longer able to perform this duty.

# 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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