



# National ABLE Alliance 2026 Annual Due Diligence Meeting

Tuesday, April 28th, 2026 1 p.m. ET – 3:30 p.m. ET

# Agenda

- 1 **Fifth Third**
- 2 **Marketing**
- 3 **ADA Compliance**

- 4 **ABLE Product**
- 5 **Ascensus Analytics**
- 6 **Investment Recommendations**



**Fifth Third**



# Looking Forward: Development

# ABLE Checking: Development Updates

- Platform Enhancement updates
  - Unite Access for Fifth Third: In process for 2026
  - Fifth Third debit platform update and enhancements – on track for 1Q 2027 deployment
    - Includes debit card on/off functionality
  - Expanded roles in Fifth Third ABLE Checking platform
    - Will allow additional AIs and other relationships to be reflected in Fifth Third system – 2027 development item
- Additional development
  - Checking Option for Entities: Fifth Third and Ascensus plan to work together to understand use cases and requirements, and develop a solution for entities to spend on behalf of clients
  - This is likely a development effort which will be managed as a project between Fifth Third and Ascensus



**Marketing**

# ***NAA Q2 2026 Marketing***

# NAA 2026 Q2 Focus

## Key Areas:

June contribution  
 Visually impaired collateral  
 Entity marketing  
 ABLEtoSave/Nat'l Financial Literacy

Ugift  
 New web videos  
 Trump account FAQ

### Emails:

- Contribution

### Social Media:

- ABLEtoSAVE/National Financial Literacy month
- Entity
- Learn more about your ABLE plan

### Account Messaging:

- Ugift

### Marketing Collateral:

- Visually impaired ABLE Plan Overview
- Entity Half pager

### Website Messaging:

- ABLEtoSave/National Financial Literacy month
- Ugift

### Website:

#### Landing page

- Entity landing page

#### Video

- 2-minute video

#### FAQ

- Trump Account FAQ

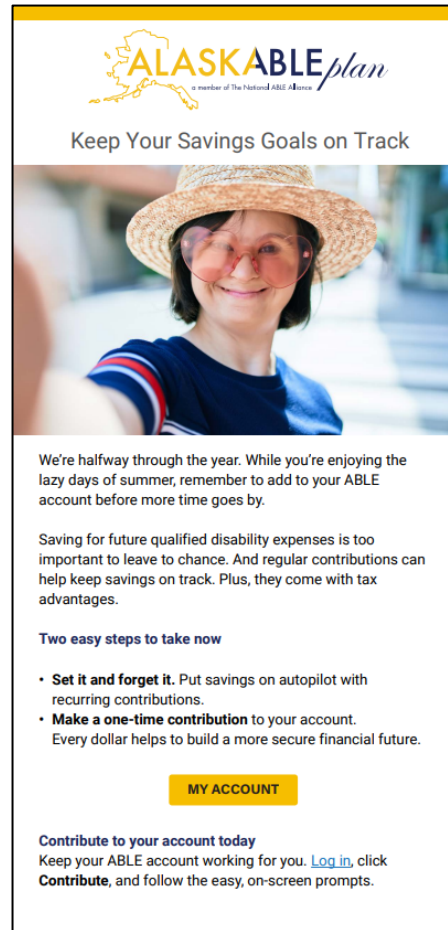
| Channel  | April                               | May  | June  |
|--|-------------------------------------|--|---|
| Email<br><i>ABLE Accounts<br/>(Open &amp; unfunded accounts)</i> |                                     |  | CONTRIBUTION<br>1/2 Year<br>Revision<br><small>(All accounts without a contribution to-date &amp; non-funded accounts only)</small> |
| Email<br><i>Abandoned enrollment</i>                             |                                     |  | ~Re-laund   |
| Social Media<br><i>(Pick-ups/slight revision from 2025)</i>      | ABLEtoSAVE/NAT'L FINANCIAL LITERACY | ENTITY SM<br><i>(4 versions leveraged from 2025)</i> | LEARN MORE ABOUT YOUR STATES ABLE PLAN<br><i>(2 versions)</i>   |
| Account Messaging  | NEW!<br>UGIFT                       | UGIFT<br>Pick up                                     |   |
| Marketing Collateral   |                                     | NEW!<br>LARGER PRINT FORMAT                          | NEW!<br>ENTITY PIECE  |
| Website Messaging  | NEW!<br>ABLEtoSave Month            | NEW!<br>UGIFT  | UGIFT<br>Pick up  |
| Website  | Trump Account FAQ                   |  | NEW!<br>ABLE VIDEO<br>2 minute<br><br>NEW!<br>ENTITY LANDING PAGE   |
| Webinar  |                                     |  |   |

# NAA 2026 Q2 Email: *Contribution*

## 2026 recommendations:


- Leverage a combination of the 2025 and 2024 emails with a new image
- Add a heightened sense of urgency, consistent with the tone used in 2024;
  - “Add to your Account before more time goes by”
  - “Saving for future qualified disability expenses is too important to leave to chance”

2026



**ALASKA**ABLE plan  
a member of The National ABLE Alliance

Keep Your Savings Goals on Track



We're halfway through the year. While you're enjoying the lazy days of summer, remember to add to your ABLE account before more time goes by.

Saving for future qualified disability expenses is too important to leave to chance. And regular contributions can help keep savings on track. Plus, they come with tax advantages.

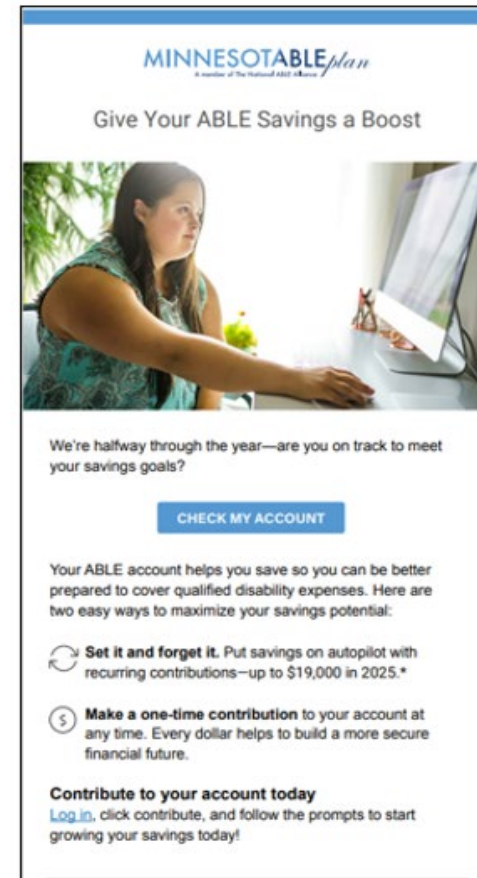
**Two easy steps to take now**

- **Set it and forget it.** Put savings on autopilot with recurring contributions.
- **Make a one-time contribution** to your account. Every dollar helps to build a more secure financial future.

**MY ACCOUNT**


**Contribute to your account today**  
Keep your ABLE account working for you. [Log in](#), click **Contribute**, and follow the easy, on-screen prompts.

2025



**MINNESOTA**ABLE plan  
A member of The National ABLE Alliance

Give Your ABLE Savings a Boost



We're halfway through the year—are you on track to meet your savings goals?

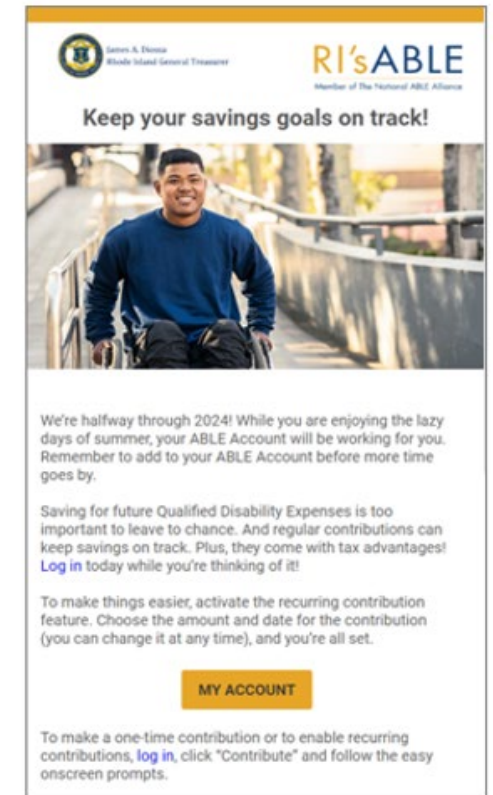
**CHECK MY ACCOUNT**

Your ABLE account helps you save so you can be better prepared to cover qualified disability expenses. Here are two easy ways to maximize your savings potential:

- 🔄 **Set it and forget it.** Put savings on autopilot with recurring contributions—up to \$19,000 in 2025.\*
- 💰 **Make a one-time contribution** to your account at any time. Every dollar helps to build a more secure financial future.


**Contribute to your account today**  
[Log in](#), click contribute, and follow the prompts to start growing your savings today!

2024



**RI's ABLE**  
Member of The National ABLE Alliance

Keep your savings goals on track!



We're halfway through 2024! While you are enjoying the lazy days of summer, your ABLE Account will be working for you. Remember to add to your ABLE Account before more time goes by.

Saving for future Qualified Disability Expenses is too important to leave to chance. And regular contributions can keep savings on track. Plus, they come with tax advantages! [Log in](#) today while you're thinking of it!

To make things easier, activate the recurring contribution feature. Choose the amount and date for the contribution (you can change it at any time), and you're all set.

**MY ACCOUNT**

To make a one-time contribution or to enable recurring contributions, [log in](#), click "Contribute" and follow the easy onscreen prompts.

# NAA 2026 Q2 Social Media:

## Social media posts:

- *ABLEtoSAVE/National Financial Literacy*
- *Entity (multiple versions)*
- *Learn More About Your States ABLE Plan (two versions)*

### April ABLEtoSave & Financial Literacy

 **State website name**  
January 29, 2026

April is #ABLEtoSave and Financial Literacy Month, which makes it the perfect time to improve your financial future.

An ABLE account can help individuals with disabilities:

- Build savings for everyday expenses and long-term goals
- Protect critical benefits like SSI, SSDI, and Medicaid
- Benefit from tax-advantages like tax-deferred earnings and tax-free withdrawals for qualified expenses

Ready to start saving? Go to [state's URL] to open an ABLE account today. Get started with as little as \$1.


#ABLEtoSave #FinancialLiteracyMonth




 Celebrate #ABLEtoSave and Financial Literacy Month by saving for the future with ABLE

statewebsite.com  
Save for the Future with ABLE.


### May Entity



 Manage all your ABLE accounts with one login

Entities managing multiple ABLE accounts: Save time, streamline account management, and ditch the separate login credentials by using the Entity Management Dashboard. You'll love the convenience of single sign-on access to all your accounts. Learn more and register at [link].


### June Learn More About Your States ABLE Plan

 **State website name**  
January 29, 2026

An ABLE plan makes it easy to save for essential expenses such as education, housing, or healthcare, without putting other disability benefits at risk. Contribute savings to a checking account for everyday access or invest in a portfolio. ABLE plans give you options so you can achieve both short- and long-term goals.

For individuals living with disabilities and their families, a more secure financial future is within reach. Learn more about your state's ABLE plan at <insert state's URL>.

Save with a plan tailored to your needs.



statewebsite.com  
An ABLE Plan Is a Flexible, Tax-Advantaged Way to Save


**Location in Box:** (for April & June – May – coming soon)

<https://ascensus.app.box.com/folder/307528837293?s=bs757pz74uj6xthnzoo8yewde4k4zf1>

# NAA 2026 Q2 Account & Website Messaging:

**Account message:** *(April & May)*

*Ugift*



Celebrate anything—and everything! Friends and family can support your ABLE account using Ugift. It's easy, secure, and free. Share your Ugift code today.


**Web messages:** *(April - June)*

*ABLEtoSave Month – April*


*Ugift – May, June*

ABLEtoSave

April is #ABLEtoSave and Financial Literacy Month—make this the moment you invest in your financial future. **Open an ABLE Account** today.



**ALASKABLE plan**  
a member of The National ABLE Alliance



Ugift


Celebrate anything—and everything! Friends and family can support your ABLE account using Ugift. It's easy, secure, and free. [Log in](#) to your Account to give Ugift a try!

# NAA: 2026 Q2 New Marketing Collateral

## Two New Marketing Collateral pieces:

- Visually Impaired ABLE Plan Overview
- Entity half-pager

### Visually Impaired ABLE Plan Overview



AR.savewithable.com QR code by state & accessible for the legally blind

**Save for What Matters with an AR ABLE Account**

**Build savings while protecting essential benefits.**

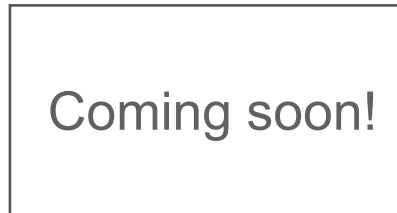
Achieving a Better Life Experience (ABLE) accounts can help make it easy for individuals with disabilities and their families to save and invest with:

- No impact on disability benefits like Supplemental Security Income (SSI)<sup>1</sup> and Medicaid
- Tax-free earnings and withdrawals for qualified disability expenses<sup>2</sup>

For more information, scan the QR code.



### Entity Half-Pager



Note: Half-pager dependent on new Entity landing page

# NAA: 2026 Q2 Website

## New additions:

### New Entity landing page

- Register your Entity

### New Preliminary Entity Landing Page

Description

**Streamline ABLÉ account management with Ascensus**

Easily and securely manage multiple accounts with the Entity Management Dashboard—designed for organizations and authorized individuals supporting people with disabilities. Save time with centralized ABLÉ account management, giving you a simplified view of all accounts at a glance.

**Benefits**

**Manage new accounts and users with ease**  
Maintain full control—easily open new accounts and add or remove Entity team members as needed.

**Save time and reduce risk with digital-first tools**  
Increase efficiency and prevent manual errors with a fully online experience for faster, more accurate account management.

**Track accounts in real time**  
Gain peace of mind and make informed financial decisions with real-time insights into balances, transactions, and account activity across all accounts.

[Register Your Entity](#) [Entity Dashboard Login](#)

Not an Entity? [Go to Individual Enrollment](#)

**The Entity Management Dashboard is for:**

Entities serving as agent under power of attorney, guardian or conservator, or as an SSA-appointed representative payee may benefit from the ability to open and manage multiple ABLÉ Accounts for the individuals they serve - with one log in.

| State or Government Entities  | Non-Profit Entities  | For-Profit Entities  |
|---|--|--|
| <ul style="list-style-type: none"><li>✓ <a href="#">Entity Information</a>, including TIN</li><li>✓ <a href="#">Team Member Requirements</a> for State or Government Entities</li><li>✓ <a href="#">Notarized Entity Certification Form</a> <a href="#">↓</a></li></ul> | <ul style="list-style-type: none"><li>✓ <a href="#">Entity Information</a>, including TIN</li><li>✓ <a href="#">Team Member Requirements</a> for Non-Profit Entities</li><li>✓ <a href="#">Notarized Entity Certification Form</a> <a href="#">↓</a></li></ul> | <ul style="list-style-type: none"><li>✓ <a href="#">Entity Information</a>, including TIN</li><li>✓ <a href="#">Team Member Requirements</a> for For-Profit Entities</li><li>✓ <a href="#">Notarized Entity Certification Form</a> <a href="#">↓</a></li></ul> |

[Register Your Entity](#) [Entity Dashboard Login](#)

Not an Entity? [Go to Individual Enrollment](#)

To help your registration go smoothly, consider downloading and notarizing the [Entity Certification Form](#) in advance. This form is required to complete the Entity Registration.

Key benefits

Who is this for

### Current Entity Landing Page

**Please note:** If your organization is currently managing Accounts through MABLE, your existing Accounts will move into your Dashboard once registered for an Entity Management Dashboard [Learn More](#)

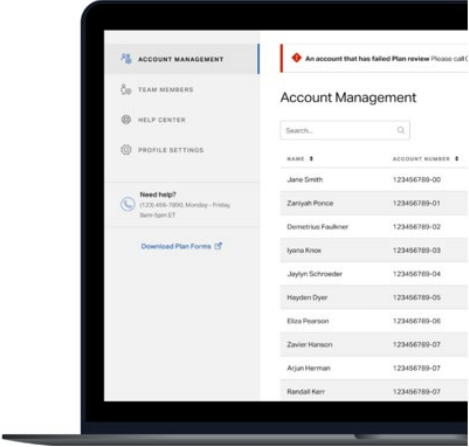
**ENTITY MANAGEMENT DASHBOARD**

### Entity ABLÉ Account Management

The Entity Management Dashboard makes it easy for Entities to open and manage multiple ABLÉ Accounts on behalf of the many individuals they represent.

[Entity Dashboard Login](#) [Register Your Entity](#)

Not an Entity? [Go to Individual Enrollment](#)



| ACCOUNT            | ACCOUNT OWNER |
|--------------------|---------------|
| Jane Smith         | 123456789-00  |
| Zariyah Ponce      | 123456789-01  |
| Demetrius Faulkner | 123456789-02  |
| Yvona Knox         | 123456789-03  |
| Jaylyn Schneider   | 123456789-04  |
| Hayden Dyer        | 123456789-05  |
| Eliza Pearson      | 123456789-06  |
| Zavier Harrison    | 123456789-07  |
| Aujan Herman       | 123456789-07  |
| Randall Kerr       | 123456789-07  |

**The Entity Management Dashboard is for:**

| State or Government Entities  | Non-Profit Entities  | For-Profit Entities  |
|---|--|--|
| <ul style="list-style-type: none"><li>✓ <a href="#">Entity Information</a>, including TIN</li><li>✓ <a href="#">Team Member Requirements</a> for State or Government Entities</li><li>✓ <a href="#">Notarized Entity Certification Form</a> <a href="#">↓</a></li></ul> | <ul style="list-style-type: none"><li>✓ <a href="#">Entity Information</a>, including TIN</li><li>✓ <a href="#">Team Member Requirements</a> for Non-Profit Entities</li><li>✓ <a href="#">Notarized Entity Certification Form</a> <a href="#">↓</a></li></ul> | <ul style="list-style-type: none"><li>✓ <a href="#">Entity Information</a>, including TIN</li><li>✓ <a href="#">Team Member Requirements</a> for For-Profit Entities</li><li>✓ <a href="#">Notarized Entity Certification Form</a> <a href="#">↓</a></li></ul> |

# NAA: 2026 Q2 Website

## New additions:

### Trump account FAQ

- To be placed within the FAQ section of the website

**How do Trump accounts coordinate with ABLE accounts?**

Trump accounts may be directly rolled over tax free to an ABLE account. The beneficiary of the Trump account must be the ABLE Account Owner. The entire balance of the Trump account must be directly rolled over in the year in which the Trump account beneficiary attains age 17 (and not in any prior or subsequent calendar year).

**SHORTER FAQs**

AK, AR, CT, DC, DE, KS, MT, NH, NJ, RI

- [How much can I contribute to my account?](#)
- [Can friends and family make contributions into my account?](#)
- [How often can I change my investments?](#)
- [What is a recurring contribution?](#)
- [What is a Systematic Exchange?](#)
- [What is a Systematic Withdrawal?](#)
- [What is an investment?](#)
- [I am working and earning income – can I contribute more than the \\$20,000 limit?](#)
- [What is Ugift® and how do I use it?](#)
- [Who can open an account on my behalf?](#)
- How do Trump accounts coordinate with ABLE accounts?**

**LONGER FAQs**

IN, MI, MN, MS, NV

- General**
- Eligibility**
- Account Opening**
- Authorized Individuals**
- Making Contributions to an Account**
  - [How much can be saved in an ABLE Account?](#)
  - [Can more be saved annually if the Account Owner is working?](#)
  - [Who can contribute to the ABLE Account?](#)
  - [What is Ugift® and how do I use it?](#)
  - [Are contributions to my ABLE Account deductible on my state income tax return?](#)
  - [Can I roll over a 529 Education Savings Plan to the ABLE Account?](#)
  - How do Trump accounts coordinate with ABLE accounts?**
  - [Are contributions eligible for the Saver's Credit?](#)
  - [Will an ABLE Account allow me to earn higher wages at work, and not impact my benefits, if I direct deposit them into my ABLE Account?](#)
  - [What is a recurring contribution?](#)
- Using ABLE Assets for Qualified Disability Expenses**

# NAA: 2026 Q2 Website

## New additions:

### Two-minute videos

- #1 Leverage the new ABLÉ today “Introduction to ABLÉ Accounts” video
  - Place on individual state sites under “Resources”



**YouTube Link:**

<https://www.youtube.com/watch?v=RHAkGKQ-d-I>

- #2 Develop a “How-to-open an ABLÉ account” video
  - Variability with plan name and plan url

# NAA: 2026 Marketing Plan

NEW!  
Completed  
In-process

| Channel  | Jan   | Feb   | March   | April                               | May  | June  | July                                  | Aug  | Sept                           | Oct   | Nov                                   | Dec  |
|--|---|---|---|-------------------------------------|--|---|---------------------------------------|--|--------------------------------|---|---------------------------------------|--|
| Email<br><i>ABLE Accounts<br/>(Open &amp; unfunded accounts)</i> |   |   | ACCOUNT CHECK-IN w/mention of ABLE Age Adjustment<br><i>Light revision</i>  |                                     |  | CONTRIBUTION 1/2 Year Revision<br><i>(All accounts without a contribution to-date &amp; non-funded accounts only)</i> |                                       | NAT'L ABLE SAVINGS DAY (8/14)<br><i>Light revision</i> |                                | NAT'L DISABILITY EMPLOYMENT AWARENESS MONTH<br><i>Revision</i>                                    |                                       | NEW!<br>CONTRIBUTION Dec 1                       |
| Email<br><i>Abandoned enrollment</i>                             | *Re-launch of new Abandon Enrollment emails   |   |   |                                     |  |   |                                       |  |                                |   |                                       |  |
| Social Media<br><i>(Pick-ups/slight revision from 2025)</i>      | * CONTRIBUTION LIMIT<br>*ABLE AGE ADJUSTMENT  | LEARN MORE ABOUT YOUR STATES ABLE PLAN (2 versions) | DEVELOPMENTAL DISABILITIES MONTH  | ABLEtoSAVE/NAT'L FINANCIAL LITERACY | ENTITY SM (4 versions leveraged from 2025) | LEARN MORE ABOUT YOUR STATES ABLE PLAN (2 versions)   | DISABILITY PRIDE MONTH (*7/11)        | NATIONAL ABLE SAVINGS DAY (8/14)                       | NEW!<br>ENTITY SM (2 versions) | NAT'L DISABILITY EMPLOYMENT AWARENESS MONTH   | UGIFT VETERANS DAY                    | UGIFT  |
| Account Messaging  |   | CONTRIBUTION LIMIT INCREASE                         |   | NEW!<br>UGIFT                       | UGIFT<br><i>Pick up</i>                    |   |                                       | UGIFT<br><i>Pick up</i>                                | UGIFT<br><i>Pick up</i>        |   | UGIFT & End of Year contribution      | UGIFT & End of Year contribution                 |
| Marketing Collateral   | <p><b>NEW FOR 2026</b></p> <p>1) ABLE Age Adjust Veterans<br/>2) ABLE Enrollment Flow</p> <p><b>REVISED COLLATERAL</b><br/><i>(Contrib increase &amp; ABLE Age Adjustment)</i></p> <p>3) ABLE Plan Overview<br/>4) ABLE Plan FAQs<br/>5) ABLE Age Adjustment</p> <p><i>No Change for 2026</i></p> <p>6) ABLE Investment Flyer<br/>7) ABLE Plan Postcard</p> |   |   |                                     |  | NEW!<br>LARGER PRINT FORMAT   | NEW!<br>ENTITY PIECE                  |  |                                | 2027 UPDATES FOR ALL COLLATERAL to launch 1/1/27  |                                       | 2027 UPDATES FOR ALL COLLATERAL to launch 1/1/27 |
| Website Messaging  | ABLE AGE ADJUSTMENT   |   |   | NEW!<br>ABLEtoSave Month            | NEW!<br>UGIFT                              | UGIFT<br><i>Pick up</i>   | UGIFT<br><i>Pick up</i>               | NEW!<br>NAT'L ABLE SAVINGS DAY<br><i>Pull from SM</i>  | UGIFT                          | NEW!<br>NAT'L DISABILITY EMPLOYMENT AWARENESS MONTH<br><i>Pull from SM</i>                        | UGIFT                                 | UGIFT  |
| Website  | 2026 WEB UPDATES<br><i>Contributions - \$20,000<br/>Age 26 to 46<br/>Removal of slimlines<br/>Addition of new collateral</i>  |   |   | Trump Account FAQ                   |  |   | NEW!<br>ABLE VIDEO<br><i>2 minute</i> |  |                                | 2027 WEB UPDATES<br><i>Identify all areas that need to be updated on the web (Begin in Sept.)</i> | NEW!<br>ABLE VIDEO<br><i>2 minute</i> | 2027 WEB UPDATES to launch 1/1/27                |
| Webinar  |   |   | NEW!<br>3 ABLE WEBINARS<br>* Open 2 account (high level)<br>* Open one account (each screen)<br>* Open an entity account (high level) |                                     |  |   |                                       |  |                                |   |                                       |  |



# ADA Compliance

# Accessibility

Overall, Ascensus is and will continue to be substantially conformant with WCAG 2.1 Level AA standards, ensuring users, regardless of ability, can access, use, and derive value from all Ascensus products.

## Ascensus' Accessibility Practice

Ascensus Government Savings (AGS) has consistently made accessibility a high priority in technology and service initiatives, with a heightened focus over the past five years.

Ascensus has been actively advancing a structured accessibility program aligned with WCAG 2.2 Level AA standards. The accessibility practice is organized around three core pillars:

Audits

Targeted Remediation

Tools, Training, Policies

# Accessibility

Overall, Ascensus is and will continue to be substantially conformant with WCAG 2.1 Level AA standards, ensuring users, regardless of ability, can access, use, and derive value from all Ascensus products.

## Ascensus' Accessibility Practice

### Audits

Ascensus maintains an ongoing partnership with an independent, third-party firm that provides rigorous audits, leveraging both automated and live-user testing.

We ensure that all new features are audited after they are released. We also have performed strategic audits of our existing platform to ensure it is substantially conformant to WCAG guidelines and to identify areas where remediation would further expand our products' accessibility.

### Targeted Remediation

Tools, Training, Policies

# Accessibility

Overall, Ascensus is and will continue to be substantially conformant with WCAG 2.1 Level AA standards, ensuring users, regardless of ability, can access, use, and derive value from all Ascensus products.

## Ascensus' Accessibility Practice

### Audits

#### Targeted Remediation

In addition to engaging with outside consultants to identify and to improve accessibility across our products, AGS is currently devotes resources to promote compliance. AGS prioritizes remediation of high severity findings with other high-value work in support of savers and AGS partners. We will attempt to address high severity issues found in any accessibility audit by the end of the next quarter after which they are identified.

Additionally, we put accessibility at the heart of our new platform. Our new platform leverages a more robust technical foundation, modern user interface components, and new user experience designs – all of which significantly provide greater accessibility. Ascensus has committed resources to completing that migration. Given the improved accessibility that the new platform provides, the migration is a cornerstone for Ascensus ongoing commitment to accessibility.

### Tools, Training, Policies

# Accessibility

Overall, Ascensus is and will continue to be substantially conformant with WCAG 2.1 Level AA standards, ensuring users, regardless of ability, can access, use, and derive value from all Ascensus products.

## Ascensus' Accessibility Practice

Audits

Targeted Remediation

### **Tools, Training, Policies**

Ascensus has expanded accessibility capabilities through a set of new set of tools that help the organization to better design for accessibility, develop code with accessibility best practices, and to test for accessibility issues. To complement those expanded capabilities, Ascensus has invested in hiring new talent with accessibility expertise and providing training for existing associates.



# **ABLE Product**



# ABLE PRODUCT JOURNEY

Kimberly Shockley, Relationship Manager  
Nicole Braccia, Senior Product Manager

# Universal Enrollment

Modernizing account opening with streamlined digital workflows and enhanced data capture across all Plans

The screenshot shows a digital enrollment form for an Able Plan. The header includes the 'Able Plan Logo' and the text 'Let's open a {{PLAN}} ABLE account!'. Below this is a link for 'Continue Enrollment' for those who have already started. A section titled '4 EASY STEPS' lists four steps: 1. Verify identity, 2. Tell us who you are saving for, 3. Set up initial and recurring savings, and 4. Select how you would like to invest. There is also a link for 'Important Legal Information'. At the bottom left, there is a phone icon and text: 'Need help? Please call Customer Service at {{{###} ###-####} Monday-Friday {{#:## am to #:## pm TZ}}'. Navigation links for 'Back' and 'Log in' are at the bottom left. The main form area is titled 'YOUR ONLINE ACCESS' and contains instructions: 'Please provide the following details for the individual who will serve as the primary point of contact and will manage the day-to-day account activities.' The form fields include: Username, Password (with an eye icon), Confirm Password (with an eye icon), First Name, Last Name, Email (with an envelope icon), Confirm Email (with an envelope icon), Phone Number, and Phone Type (with a dropdown arrow). A blue button at the bottom right says 'Create Your Login'.



## Digital Transformation

Delivers consistent user experience focusing on improved enrollment completion and reduction of incomplete rates.



## Enhanced Data Capture

Provides enhanced data collection that supports more effective outreach, particularly regarding Age of Onset and Veteran status.



## Enablement Timeline

Under evaluation to accelerate Plan enablement, demonstrating a commitment to platform-wide modernization.

# Service and Operations

Improving Customer Service and Secure Site functions to achieve quicker issue resolution, minimize obstacles for clients, and enhance security by increasing visibility and control.

## Faster Resolution Across Entity and Account Requests

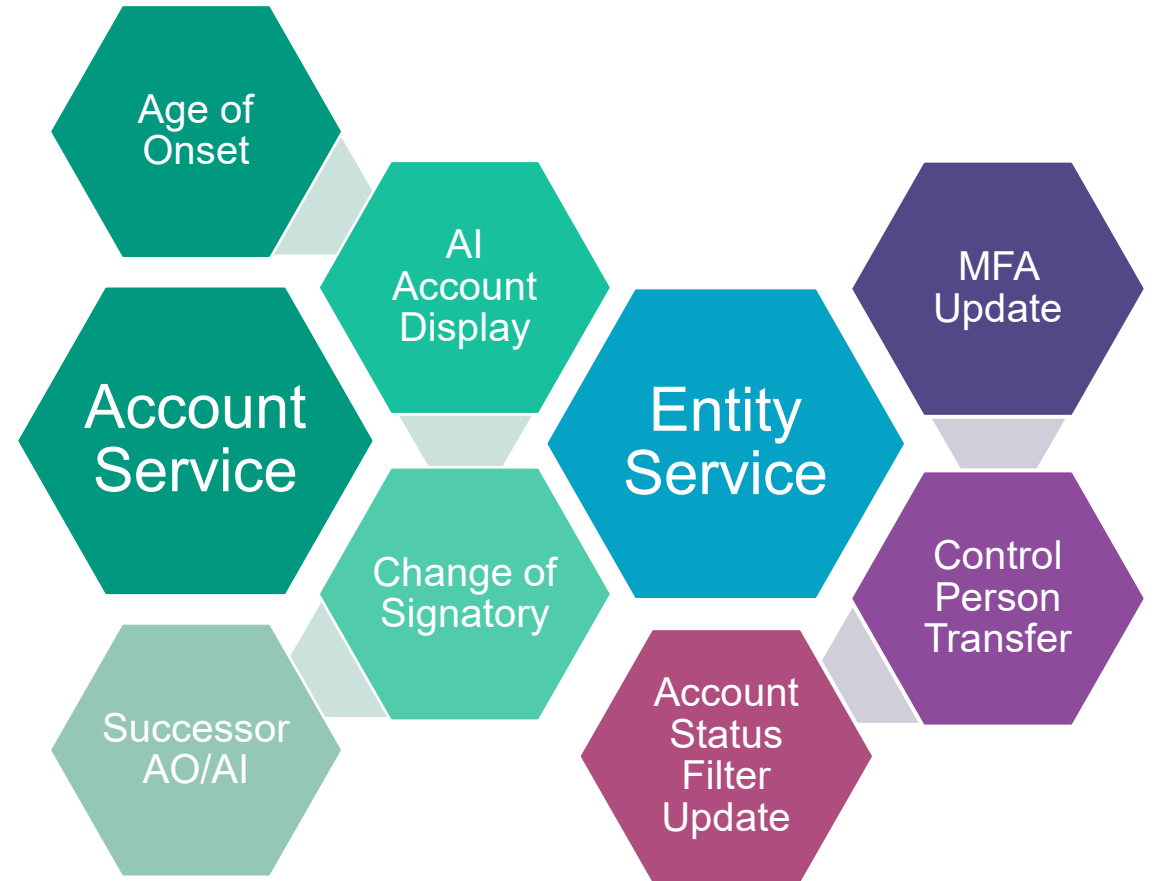
Customer Service Representatives (CSRs) can quickly resolve high-volume issues across both Entity and Account services, including MFA updates, Entity Dashboard Account Status visibility, Age of Onset edits, and Change of Signatory requests—reducing handoffs, delays, and repeat follow-ups.

## Improved Continuity, Control, and Succession Management

Enhanced controls support secure, uninterrupted account and entity management through Control Person Transfer, Successor Account Owner and Authorized Individual (AO/AI) setup, and clear Authorized Individual (AI) display, ensuring continuity when roles change or coverage is required.

## Expanded Visibility and Support Access

Broader visibility into account and entity structures—through Account Status filters, AI type display (Individual vs. Entity), and expanded Fifth Third access—enables faster diagnostics, more accurate responses, and stronger oversight across service teams.



# Service and Operations

The Account Owner Profile was updated to allow **both** customer service representatives and account owners to modify the Age of Onset, enhancing customer insight and engagement.

Additionally, the Authorized Individual Profile was improved to enable customer service to easily identify whether the Authorized Individual is a person or an entity, thereby improving support for customer inquiries.

The screenshot displays a user interface for account management. On the left, a vertical navigation menu includes: Profile (highlighted), Bank Information, Payroll Deduction, Delivery Preferences, Statements, Confirms & Tax Forms, Authorized Individual, Additional Authorized Individuals, Interested Parties, and Successors. The main content area is titled 'Personal Details' and lists: Name (Glor S A'Lin), Birth Date (03/10/1985), Citizenship (United States), Eligibility code (The Account Owner is entitled to Supplemental Security Income benefits under Title XVI of the Social Security Act. (SSI Benefits Eligibility)), Disability type (Code 7 - Other: Includes Tetralogy of Fallot, Hypoplastic left heart syndrome, End-stage liver disease, Juvenile-onset rheumatoid arthritis, Sickle cell disease, Hemophilia, and any other disability not listed under Codes 1 - 6), and Promo Code (Age of Disability Onset). A callout box below this section states: 'To change your name, please mail Account Information Change form PDF with supporting documentation. To update your birthdate, citizenship, or SSN, please call Client Services for instructions.' Below the main content, there is a notification: 'Looking for past statements? Account owners can download records from their previous account portal until July 1, 2026'. At the bottom, a section titled 'Individual Account' provides details: Account Type 4: Adult without Legal Capacity, Opened: 04/11/2025, Converted: 03/20/2026, CID Verification Accepted, B55611639-01, and Journey Payee Services FBO Glor A'Lin. A bottom navigation bar includes: CSR Actions, CSR Information, Financial history, Bank instruction history, Maintenance history, Jett Transaction History, QFAC history, and Overview (highlighted).

# Service and Operations

Improves the customer service process and enables Account Owners to designate both a Successor Account Owner and Successor Authorized Individual.



## Successors

- Profile
- Bank Information
- Payroll Deduction
- Delivery Preferences
- Password & Security Features
- Statements, Confirms & Tax Forms
- Authorized Individual
- Additional Authorized Individuals
- Interested Parties
- Update Custodian Type
- Successors**

### Account Owner

ELENA SANTIAGO

The Successor Account Owner will assume allowable rights of the account in the event of your death. You can have one Successor Account Owner.

No Successor on file.

[Add Successor](#)

### Authorized Individual

AMELIA HERNANDEZ

The Successor Authorized Individual is the person or organization you choose to manage the account if the current Authorized Individual can no longer serve. You can have one Successor Authorized Individual.

No Successor on file.

[Add Successor](#)

# Service and Operations

Enhances the customer service procedure to efficiently handle Change of Signatory requests for accounts entering or leaving an Entity Authority.

Profile

Bank Information

Payroll Deduction

Delivery Preferences

Statements, Confirms & Tax Forms

Authorized Individual

Additional Authorized Individuals

Interested Parties

Update Custodian Type

**Link to Entity**

Successors

Link to Entity

Select Account Type: Minor (Account Type 2)

Select Authorized Individual Type: Power of Attorney

Cancel

Next

Select

Search

Review

Done

Profile

Bank Information

Payroll Deduction

Delivery Preferences

Statements, Confirms & Tax Forms

Authorized Individual

Interested Parties

Update Custodian Type

**Unlink from Entity**

Successors

Unlink from Entity

Unlink from Entity

**IMPORTANT NOTICE**

By Unlinking this account, it will be removed from the entity dashboard, disconnected from its current entity, and converted to Account Type 1 with no Authorized Individual Information.

Cancel

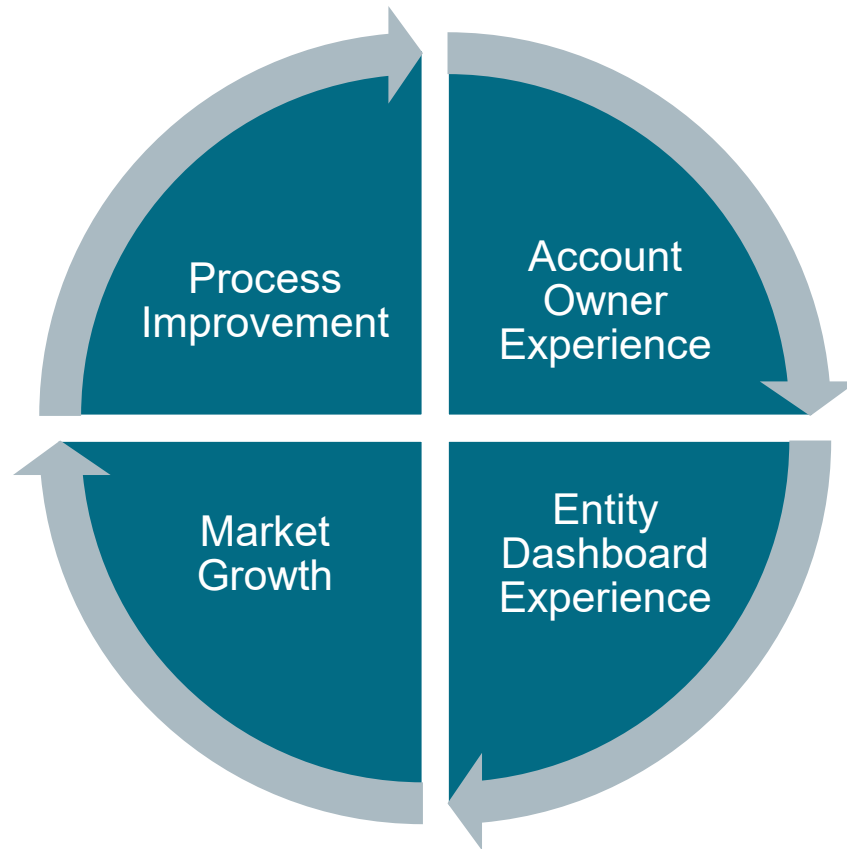
Unlink

Review

Done

# Priorities for 2026

Keep carefully examining potential opportunities to improve both the user experience and the growth strategy for ABLE



## Prioritized

- ABLE UE Accelerated Enablement
- Upload documentation from 2MB to 10MB
- Entity Bulk Enrollment

## Researching

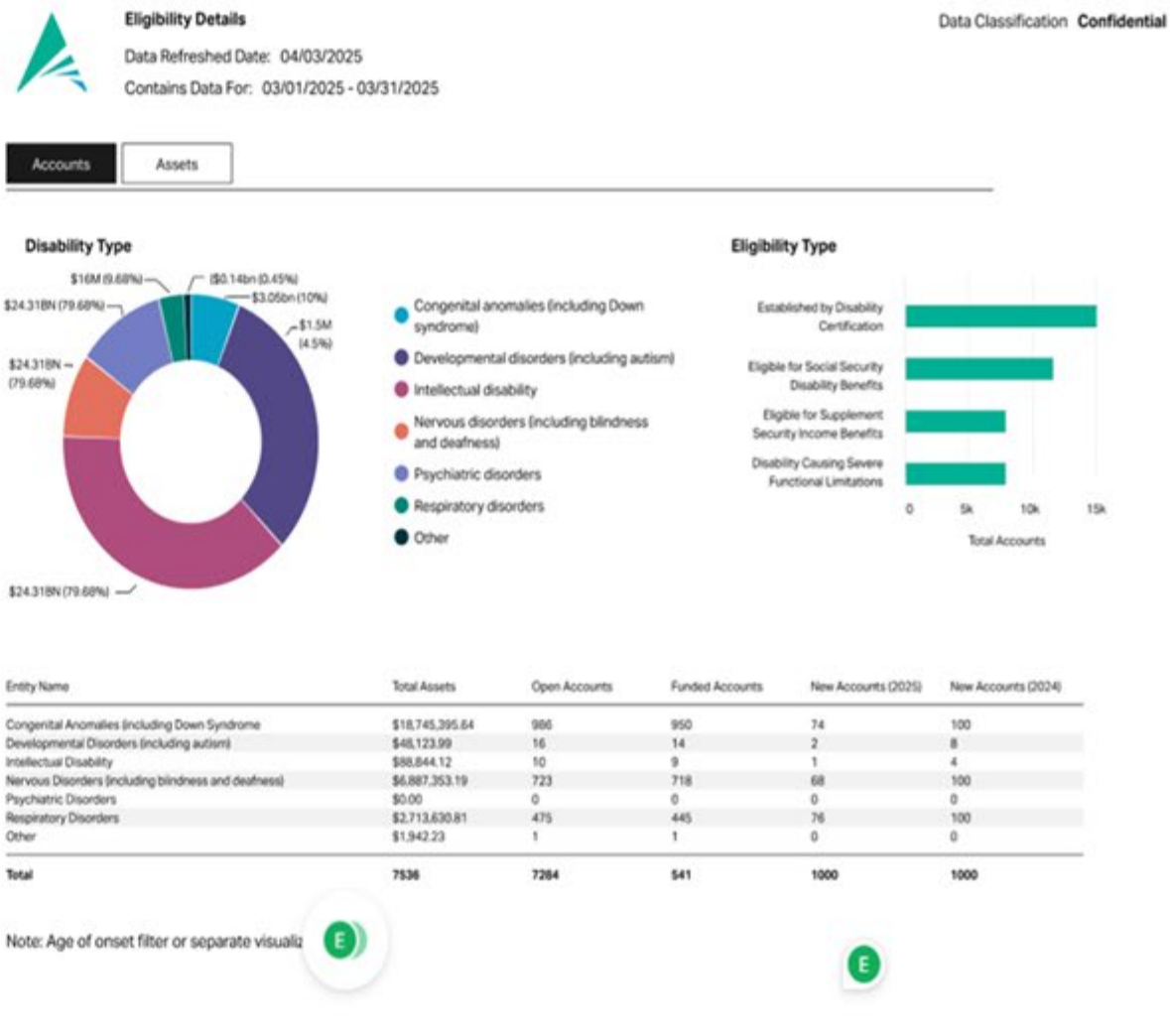
- Entity Checking Account Option



# Ascensus Analytics

# Ascensus Analytics 2.0

- Ensuring all the entity data is part of the new dashboards release
- Interactive prototypes – see us at NAST!
- Looking for 2-3 BETA clients for this release



# ABLE Advocacy

1

## Within the NAA

Attend committee meetings (Working group, marketing, investments)

Create opportunities for the states to ask questions of each other and share research and conduct that has led to growth in some plans

2

## Community Advocacy

Ascensus and state participation in NAST and ASPN

Engaging with ABLE Advocacy groups to promote ABLE and all NAA plans

Work with states individually to help with webinar content and presentations

3

## Government Relations

Ascensus leverages dedicated government relations team in lobbying efforts for ABLE related-matters

Ascensus leadership to take more active role in Hill engagement and advocacy

On the surveys we received back from you in 2025, many of you spoke to how you would like to be able to benefit more from other states in the NAA and have Ascensus as an advocate for ABLE initiatives. While some steps are already underway with this, 2026 and beyond will show continued progress.

# Thank you.

