

NORTH CAROLINA ABLE PROGRAM

BOARDS OF TRUSTEES MEETING

State Treasurer Brad Briner, Chair



May 7, 2026



2:00 PM EST



Dept. of State Treasurer
Dogwood Conference Room
3200 Atlantic Ave, Raleigh NC



GoToMeeting: <https://meet.goto.com/490102285>





1-224-501-3412
Access Code: 490-102-285



Meeting materials: <https://ncable.nc.gov/governance/meetings>

To sign up for public comment, email Patti.Hall@nctreasurer.com.

GENERAL BUSINESS

- | | | |
|---|--|-------|
| I. Call to Order | Brad Briner, Chair | |
| II. Ethics Awareness & Identification of Conflicts or Potential Conflicts of Interest | Brad Briner, Chair | |
| III. Approval of Minutes — November 6, 2025 Meeting | Brad Briner, Chair | Tab 1 |
|  ACTION REQUIRED: Act Upon Motion | | |
| IV. Administrative Update | Jeff Hancock
<i>Director</i> | Tab 2 |
| <ul style="list-style-type: none"> ● National ABLE Alliance Update ● NC ABLE Program Future- Staff Recommendation | | |
|  ACTION REQUIRED: Act Upon Motion | | |
| V. Communications and Marketing Update | Christy Farrelly
<i>Communications</i> | Tab 3 |
| VI. Program Manager Administrative Update | Kimberly Shockley,
Lori Lamphere,
Paul Souppa
<i>Ascensus</i> | Tab 4 |

COMMENTS

- | | |
|----------------------|--------------------|
| VII. Public Comments | Brad Briner, Chair |
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ADJOURNMENT

- | | |
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| VIII.  ACTION REQUIRED: Approval of Motion to Adjourn | Brad Briner, Chair |
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APPENDIX:

1. 2026 NC ABLE Board Dates Memo
2. NC ABLE Board of Trustees Information
3. ABLE Letter to General Assembly
4. NC ABLE Program – Staff Organizational Chart
5. National ABLE Alliance Investment Review

NEXT MEETING:



Nov 12, 2026



10:00 AM EST



Dept. of State Treasurer
Dogwood Conference Room
3200 Atlantic Ave, Raleigh NC

Questions regarding items on the Agenda should be addressed to the Department of State Treasurer, Retirement Systems Division by email at NCABLE@nctreasurer.com.

For persons with disabilities requesting an accommodation for an upcoming meeting, please complete the form through the QR code or link below and press submit as soon as possible, preferably at least two weeks prior to the event. Alternatively, you may email your request to accessibility@nctreasurer.com. It is important that the coordinator for disability access receives advance notice of your request as some accommodations take time to schedule and the availability of your accommodation may be limited.



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