



NC ABLE PROGRAM

NC ABLE PROGRAM BOARD OF TRUSTEES

May 7, 2026



# Communications & Outreach

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# NC ABLE Eligibility Survey

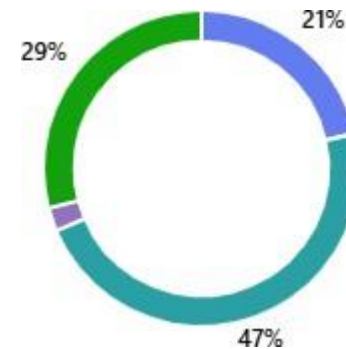
## Who is opening the account?

- I am opening an NC ABLE account for myself and I am over 18 years old.
- I am opening an account for an eligible individual as a family member, legal guardian or Power of...



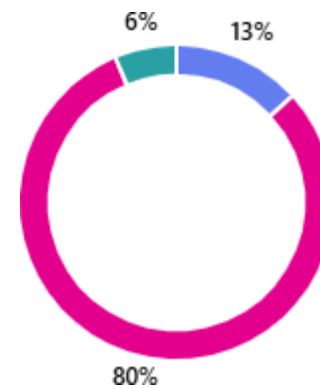
## Account owner eligibility.

- have a disability and can obtain a written diagnosis from a licensed physician.
- experience blindness as determined by the Social Security Act.
- I am eligible to receive SSI or SSDI because of a disability.
- none of the above.
- Other



## Do you participate in your employer 401(k) or other employer-sponsored retirement plan?

- Yes
- No
- I am not sure.



# Webinars and Events

Webinar	Events
NCACDSS Adult Services Committee Meeting	A Special Needs Podcast
Johnston County Public Schools	NC ABLE Clinic at UNCG
Metro School Parent Round Table	Burke County Community Resources & Transition Fair
Partners Health Management Staff	ASNC Conference
Union County Public Schools	Reach for the Stars!
NCCDD	Night to Shine
21 & You	Disability Rights NC Conference
	Goldsboro Day in the Park

Upcoming events include: FCR Family Fun Day, GSO UNITE Festival, DECI Resource Fair, Disability:IN NC, Children with Disabilities Resource Fair, NC Assistive Technology Expo, SONC Summer Games



# NCABLE.org

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NC ABLE PROGRAM



## Savings & Investment Accounts for People with Disabilities



### NC ABLE Program Benefits

Learn more about tax-advantaged savings for people with disabilities




### Investment Options

Spend for Today and Save for Tomorrow! Choose account options that fit YOU - from checking to investments



### Open an Account

Enroll and open an account online with as little as \$25

 **49,618 views**



1. [/](#)
2. [/getting-started-nc-able/nc-able-enrollment-chec...](#)
3. [/getting-started-nc-able/opening-nc-able-account](#)
4. [/benefits](#)
5. [/getting-started-nc-able/investing-basics](#)

6. [/benefits/able-work](#)
7. [/important-contacts](#)
8. [/getting-started-nc-able/eligibility](#)
9. [/getting-started-nc-able/investment-options](#)
10. [/news-media](#)



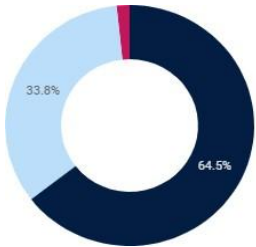
### Locations

- |    |           |                |
|----|-----------|----------------|
| 1. | Raleigh   | North Carolina |
| 2. | Charlotte | North Carolina |
| 3. | Atlanta   | Georgia        |
| 4. | Ashburn   | Virginia       |
| 5. | Boardman  | Oregon         |
| 6. | Durham    | North Carolina |



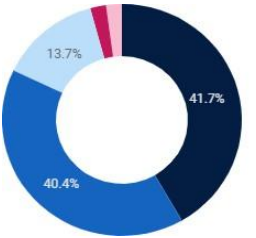
# North Carolina law prohibits Medicaid Recovery (i.e. Medicaid "payback")

NC ABLE Account Medicaid "Clawback" modifications: disallow Medicaid to recover funds from NC ABLE accounts unless required by federal law. [Read more.](#)



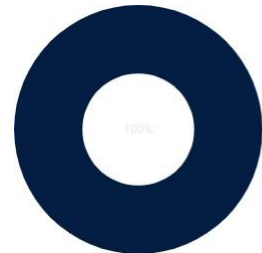
- desktop
- mobile
- Others

Device Used



- Organic Search
- Direct
- Referral
- Email
- Others

Acquisition



- Employee Benefits | NCABLE

For Employers views up 160%



**NC ABLE PROGRAM**  
Account Eligibility, Features & Benefits

**Opening an Account**

Eligible Individual is under age 18

A parent or individual with financial authority may open an account on behalf of the eligible individual.

**NC ABLE PROGRAM**  
Account Eligibility, Features & Benefits

**Investments**

Checking Account Option

- Interest bearing
- FDIC insurance up to \$250,000
- Debit card with no card issuance
- Check writing
- ATM Access
- No overdraft fees

**Reward potential**

Investment Option	Reward Potential	Risk Potential
Vanguard Cash Reserves Federal	60%	10%
Money Market (Conservative)	30%	10%
Moderately Conservative	25%	30%
Moderate	45%	45%
Growth	60%	60%
Moderately Aggressive	75%	75%

**NC ABLE PROGRAM**  
Account Eligibility, Features & Benefits

**529 Plan Rollovers**

Account Owner

Family, Friends, Employers

**\$20,000 per year** contribution & rollover limit

**Up to \$100,000** is excluded from the calculation of the resource limit for SSI

**Maximum account balance \$550,000 in North Carolina** varies by state (from \$300,000 to \$500,000+)



# Strategy & Partners

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# NC ABLE Program Communications Strategy Outline

## Areas of Focus

- **Education through engagement** – Engage the public through effective networking, editorial, social media, and PR placements with the goal of educating 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.

## Audience

- People with disabilities, their families, and guardians
- Organizations that provide services and supports for people with disabilities
- Private companies and corporations
- 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

# NC ABLE Program Communications Strategy Outline

## Key Messages

- 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.
- 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.
- 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.

# Partners & Collaborators



Department of Health and Human Services  
Division of Vocational Rehabilitation Services

*National ABLÉ Alliance*





# Thank you.



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[NCABLE.org](http://NCABLE.org)