



NC ABLE ACCOUNT ENROLLMENT CHECKLIST



Enjoy tax-advantaged saving without impacting your current benefits.



Choose options that fit your goals and comfort level.



In about 15 minutes, you can easily open an account online.



[Click here to view helpful videos on enrollment & investment options.](#)

Here's what you will need to open an NC ABLE Account.

Identifying Pieces of information:

- Name, Address & Date of Birth
- Social Security Number
- Bank Account Information (optional)
- Driver's License, State Issued or Military ID (if selecting a checking account)
- Identify the basis of eligibility through an easy, online self-certification process.
- Select your account type and investments. You will select one or more investment option and assign a percentage to each account selected for a total of 100%. Please click the links below to learn more about the investment options.

If you are a guardian, parent, sibling or other authorized person opening an account for someone else, you will need to provide the four identifying pieces of information for you and the account owner. You will also need to upload or mail authorizing documentation.

[Aggressive Investment Option](#)
[Moderately Aggressive Option](#)
[Growth Option](#)

[Moderate Option](#)
[Moderately Conservative Option](#)
[Checking Option \(debit card included\)](#)

- How would you like to fund your account? (minimal initial contribution is \$25)
 - Automatic and regular contributions from your bank account.
 - A single deposit from your bank account.

Deposit from my paycheck
 Send a check deposit. (A form will print at the end of the online registration.)

- Username, password and three security question answers.

Open your account at
www.NCABLE.org
(888) 627-7503