

I'm able with
NC ABLE



Communications and Outreach

NC ABLE Program Board of Trustees Meeting

November 8, 2023



NC ABLE
National ABLE Alliance Member



Dale R. Folwell, CPA
STATE TREASURER OF NORTH CAROLINA
DALE R. FOLWELL, CPA

NC ABLE in Action

Editorial & Media

- The Jackson Robol Show
- Spectrum Magazine
- Wilkes Record

Webinars & Events

- Monthly NC ABLE Webinars (154 Registrants)
- NCDHHS
- Abound Health
- TEACCH Autism Program
- The Arc of NC

19 Events & Webinars

Upcoming Outreach

- Wake Forest Parks & Recreation
- Miracle League of the Triangle
- Expansion of Customized Webinars



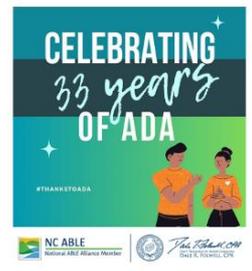
Riding in on his Honda Gold Wing motorcycle for the opening ceremonies at the Special Olympics in Wilkes County, Treasurer Dale R. Folwell, CPA spoke with volunteers, participants, and their family members. During the opening ceremonies, he gave the invocation. [State treasurer guest speaker at Wilkes Special Olympics \(thewilkesrecord.com\)](https://thewilkesrecord.com)



Everyone deserves a chance to play baseball



#ABLEtoSave with NC ABLE
FRIDAY, AUGUST 04, 2023



Today Marks 33 Years of the Americans with Disabilities Act
WEDNESDAY, JULY 26, 2023



Meet Dale Folwell, an esteemed guest on The Jackson Robol Show Podcast. [Watch here.](#)



NCABLE.org

9,000+
Pageviews

18.7%
month over month
growth of users



Top Referrals

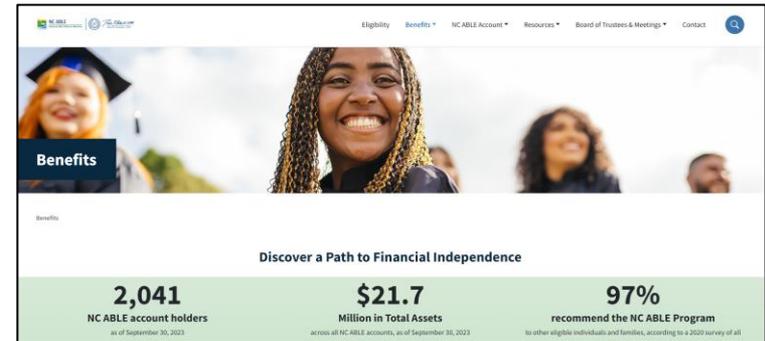
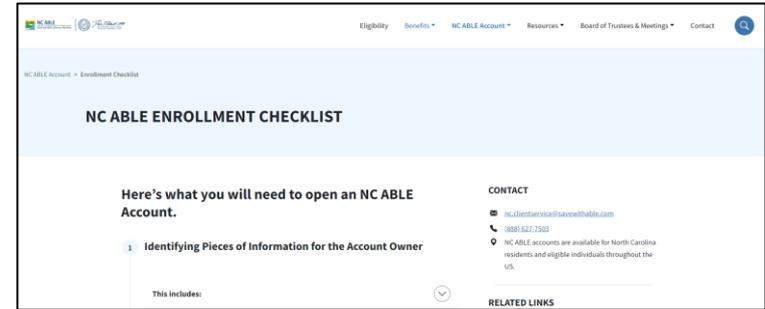
- NCTreasurer.com
- Search Engines:
 - Google, Bing, Yahoo, DuckDuckGo
- Facebook (multiple pages)
- NCCDD.org
- NCDOJ.gov

Top Pages Viewed

- Enrollment Checklist
- Benefits
- Eligibility
- Upcoming Events
- On-Demand Webinar

Top NC Locations

- | | |
|------------|---------------|
| Raleigh | Greenville |
| Charlotte | Winston-Salem |
| Greensboro | Cary |
| Durham | Wilmington |
| Asheville | Chapel Hill |



Dale R. Folwell, CPA
STATE TREASURER OF NORTH CAROLINA
DALE R. FOLWELL, CPA



Get Account Assistance
WITH AN
INTERESTED PARTY
or
AUTHORIZED INDIVIDUAL

NCABLE.org

OCCURRENCE OF DISABILITY PRIOR TO AGE OF 26

OCCURRENCE OF DISABILITY PRIOR TO AGE OF 46

The ABLE Age Adjustment Act raises the age of eligibility to 46 starting on January 1, 2026.

NCABLE National ABL Alliance Member | The Tobacco Trust for North Carolina

NCABLE National ABL Alliance Member

Dale R. Folwell, CPA
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NATIONAL DOG DAY

NCABLE CELEBRATES OUR FRIENDS WHO HELP MAKE OUR LIVES BETTER.

NCABLE Accounts & Special Needs Trusts

NCABLE Accounts & Special Needs Trusts

NCABLE.org

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DOGWOOD 1941

GRAY SQUIRREL 1969

CARDINAL 1943

PINE 1963

North Carolina Day

SWEET POTATO 1995

MILK 1963

HONEY BEE 1973

NCABLE PROGRAM 2015

TROUT 2005

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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.

Key Collaborations



Special Olympics
North Carolina



Autism Society
of North Carolina



Everyone
deserves a chance
to play baseball



Department of Health and Human Services
Division of Vocational Rehabilitation Services

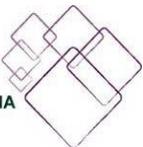


National ABLÉ Alliance



DISABILITY RIGHTS
NORTH CAROLINA

Champions for Equality and Justice



Dale R. Folwell, CPA
STATE TREASURER OF NORTH CAROLINA
DALE R. FOLWELL, CPA

Thank you



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NC ABLE & Supplemental Retirement Plans



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Achieve a Better Life Experience with the NC ABLE Program



by North Carolina Treasurer Dale R. Folwell, CPA



When I took office as the 28th Treasurer of the State of North Carolina in 2017, the NC ABLE Program was introduced. This unique program allows eligible individuals with disabilities – and those assisting them – to save and invest in tax-advantaged accounts which can fund essential disability services and qualified

expenses without endangering eligibility for means-tested, public benefits such as Medicaid and Supplemental Security Income (SSI).

Over the past six years, through grassroots efforts and working with organizations like the Autism Society of North Carolina, we have been spreading the word about NC ABLE to the population that would benefit most from the program.

Saving money can be difficult when you or a family member is living with a disability. This is only compounded if you rely on state or federal means-tested benefits.

NC ABLE changes everything.

The NC ABLE Program redefines saving for individuals with disabilities. Available to individuals of any age with the occurrence of disability prior to the age of 26, NC ABLE provides a path to financial freedom through checking and investment accounts. Additionally, earnings are tax-free when spent on qualified disability-related expenses like housing, food, special-education programs, healthcare, hearing and vision aids, laptops, financial planning, smart home technology, and even cell phones. Since 2017, the NC ABLE Program has distributed more than \$8.3 million. These are funds that have been used to help account holders Achieve a Better Life Experience.

However, NC ABLE accounts are not just for those people who are receiving means-tested benefits. It also serves as a tool for those who are employed or have benefits through work or family but do not qualify for public benefits. All NC ABLE account holders can save for current or future disability expenses and care.

Up to \$17,000 per year can be contributed into an NC ABLE account, and anyone can make contributions on behalf of the account holder. Through the ABLE-to-Work provision, working account holders can contribute even more than the annual limit and use direct deposit for their paycheck. SSI payments can also be directly deposited into an NC ABLE account.

Overseen by a six-member Board of Trustees, NC ABLE has grown to nearly 2,000 accounts and program assets of more than \$21 million. **The age limit for the occurrence of disability is increasing to 46 in 2026** through the ABLE Age Adjustment Act. This means an additional 6 million people, including 1 million veterans, may become eligible for the NC ABLE Program.

I have seen firsthand how important it is to give people with disabilities a vehicle to save and spend to Achieve a Better Life Experience – but there is more work to be done. Many families and eligible individuals have not yet heard about NC ABLE. I encourage you all to join me in raising awareness of this important program, and together we can reach all of the eligible population in North Carolina. ■

Visit [NCABLE.org](https://www.ncable.org) for more information about the program, eligibility, and benefits.



Autism Society of North Carolina | SPECTRUM

VOLUME 41 | ISSN 1044-1921 | SUMMER 2023



Our New Logo | Misconceptions about ABA | Ascend in Asheville

Autism Society of North Carolina Spectrum Magazine (Summer 2023 Issue)