



be able with
NC ABLE



Communications and Outreach

Oct.1, 2023 – Mar. 31, 2024



NC ABLE
National ABLE Alliance Member



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NC ABE in Action

Marketing Content

- Account Owner Email
- Expanded Website Content

Webinars & Events

- Autism Society of North Carolina
- Miracle League of the Triangle
- Monthly NC ABE Webinars
- NCDHHS
- NCDPI
- The Arc of NC
- Wake Forest Parks & Recreation

Upcoming Outreach

- Customized Webinars & Toolkits
- SHRM
- Special Olympics North Carolina's Summer Games

With all you juggle, it may be hard to keep your ABE Account top of mind. So why not **log in to your Account** while you're thinking of it? It will only take a moment to make sure your information is current and correct.

- Update any outdated contact information.
- Ensure you are receiving Account statement notifications and confirmations through E-Delivery to take advantage of a lower Annual Maintenance Fee.
- Review transaction history and investment performance.



Top Referrals

Google, Bing, Yahoo

NCTreasurer.com

Facebook

Top Pages Viewed

Home Page

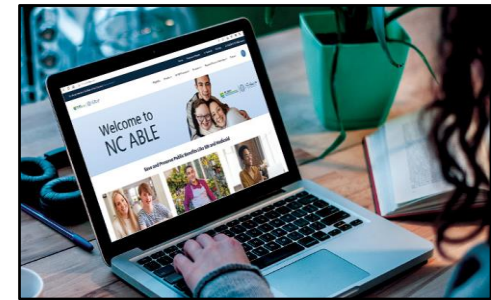
Enrollment Checklist

Benefits

Eligibility

FAQs & Resources

Opening an NC ABLE Account



Top Locations

Raleigh Charlotte

Greensboro Wake Forest

Durham

Charlotte



NC ABLE Program Benefits

Learn more about tax-advantaged savings for people with disabilities



Investment Options

Spend Today and Save 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



I'm able with
NC ABE
 in North Carolina
and across the
United States

**Roll 529 college savings plan
 into your NC ABE account.**

The average NC ABE account
 balance is **over \$10,000.**
 as of November 13

NC ABE
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6 INVESTMENT OPTIONS

**CONSERVATIVE
 TO AGGRESSIVE**

**SAVE AND INVEST
 IN YOUR FUTURE**

NCABLE.org



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



Department of Health and Human Services
Division of Vocational Rehabilitation Services

National ABLER Alliance



Thank you

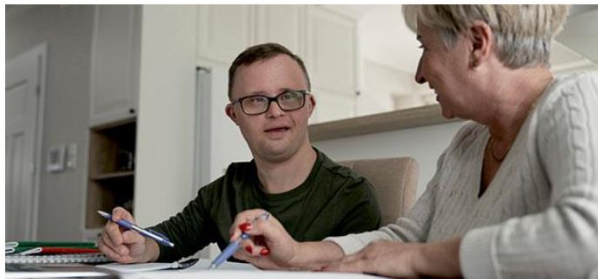


Email to NC ABLE Account Holders

Sent February 21, 2024



Take a moment to review your ABLE Account



With all you juggle, it may be hard to keep your ABLE Account top of mind. So why not [log in to your Account](#) while you're thinking of it? It will only take a moment to make sure your information is current and correct.

- Update any outdated contact information.
- Ensure you are receiving Account statement notifications and confirmations through E-Delivery to take advantage of a lower Annual Maintenance Fee.

- Review transaction history and investment performance.
- Check that your 1099-QA and 5498-QA tax forms are accurate and download them to submit with your tax return, if needed.
- Increase the amount of an existing recurring contribution or start a new one.

[LOG IN TODAY](#)

You made a good decision for the future when you opened an ABLE Account. [Log in today](#) to make sure your Account is working for you!

For more information about NC ABLE (the "Member Plan"), call (888) 627-7503, or visit [NCABLE.org](#), to obtain the Plan Disclosure Booklet and/or the Investment Policy Statement, which include investment objectives, risks, charges, expenses, and other important information about the Member Plan. Please read and consider the Plan Disclosure Booklet carefully before investing.

Before investing in any ABLE program, you should consider whether your home state offers an ABLE program that provides its taxpayers with favorable state tax or other benefits that are only available through investment in the home state's ABLE program. You also should consult your financial, tax, or other adviser to learn more about how state-based benefits (or any limitations) would apply to your specific circumstances. You also may wish to directly contact your home state's ABLE program, or any other ABLE program, to learn more about those plans' features, benefits and limitations. Keep in mind that state-based benefits should be one of many appropriately weighted factors to be considered when making an investment decision.

The Member Plan is sponsored by the state of North Carolina and administered by North Carolina Department of State Treasurer, on behalf of the NC ABLE Board of Trustees. The Member Plan is intended to be a qualified ABLE plan offered through the National ABLE Alliance. Ascensus College Savings Recordkeeping Services, LLC, the Program Manager, and its affiliates, have overall responsibility for the day-to-day operations, including investment advisory, recordkeeping and administrative services. The Member Plan's investment Options are allocations to mutual funds, ETFs, banking products and/or other investments. Except for the Checking Account Option, investments in the Member Plan are not insured by the FDIC. Interests in the Member Plan are municipal securities and the value of your Account will vary with market conditions.

