



NATIONAL RESOURCE CENTER

ACHIEVING A BETTER LIFE EXPERIENCE ACT

CONGRESSIONAL BRIEFING

The ABLE Act: A Progress Report
December 4, 2017
325 Russell Senate Office Building
10:00am-12:00pm

Host: ABLE National Resource Center

Collaborators: Consortium for Citizens with Disabilities (CCD) Financial Security Taskforce and National Association of State Treasurers (NAST) ABLE Committee

Sponsors: Senator Robert "Bob" Casey, Senator Richard Burr, Representative Cathy McMorris Rodgers, Representative Pete Sessions, Representative Tony Cardenas

Refreshments Available (9:45-10:00)

Welcome and Opening Remarks (10:00-10:10)

- Michael Morris, Executive Director, National Disability Institute
- Michael W. Frerichs, Illinois State Treasurer, Co-Chair NAST ABLE Committee
- Guest Remarks

Presentation: ABLE by the Numbers (10:10 – 10:25)

- Paul Curley, CFA, Director of Savings Research, Strategic Insight
- Andrea Feirstein, Managing Director, AKF Consulting

Panel Discussion (10:25 – 10:55)

- Michael Hamm, Ohio STABLE Account Owner
- Rob Percival, Sr. Vice President, Strategic Products, Ascensus
 - o Program Manager for ABLE: NY, PA, AK, CO, DC, IL, IA, IN, KS, MN, MT, NC, NV, RI
- Maria Padin, Program Manager, Intuition ABLE Solutions
 - o Program Manager for ABLE: TX, OH, KY, VT, MO, GA, SC
- Jim Balsan, Managing Director, BNY Mellon/Sumday
 - o Program Manager for ABLE: WA, OR, MD

Audience Questions and Answer (10:55-11:05)

Presentation: Summary of Legislative Proposals (11:05-11:20)

- Christopher J. Rodriguez, Director, ABLE National Resource Center

Panel Discussion (11:20-11:50)

- Kelly Buckland, Executive Director, National Council on Independent Living
- Mary Morris, Chief Executive Officer, Virginia 529/ABLEnow
- J.J. Hanley, Director, Illinois ABLE
- Marty Ford, Senior Executive Officer, Public Policy, The Arc of the United States
- Lisa Churchville, Director of College & Retirement Savings Plans, RI Treasurer's Office

Audience Questions and Answer (11:50-12:00)