



INvestABLE INDIANA Update

By **Amy Corbin**
Executive Director, INvestABLE Indiana

172

Accounts

\$2,991.11

Average
Account Balance

\$500,0000

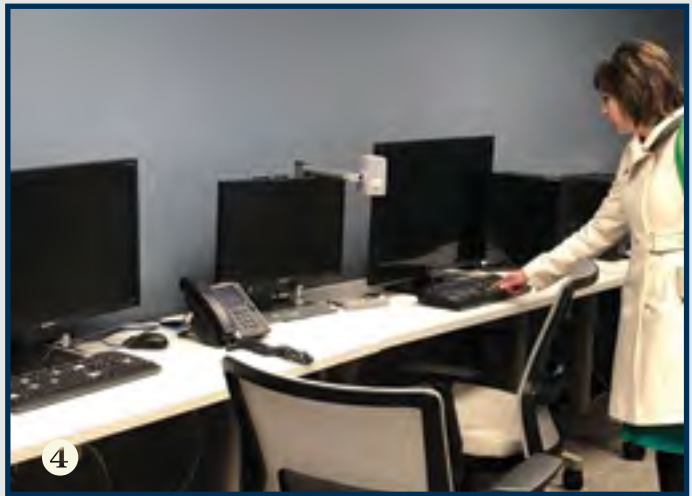
In assets under
management of the
INvestABLE program

We are quickly approaching the one-year anniversary of **INvestABLE Indiana**. This program allows for individuals with disabilities to save for qualified expenses without losing their eligibility for certain assistance programs, like SSI and Medicaid. As we approach the one-year anniversary of the INvestABLE launch, in partnership with the Office of Treasurer of State, IHcDA would like to highlight some of the first year achievements.

Much of the year I've spent traveling throughout the state speaking at schools, conferences, organizations, businesses, school transition fairs and informational community sessions to raise awareness about the INvestABLE program. These grassroots efforts, including collaborating with local legal and finance communities, service providers, benefits administrators, and potential beneficiaries was critical to the first year successes INvestABLE would experience. InvestABLE is pleased to announce that 172 accounts have been opened with an average account balance of \$2,991.11. In total, there is currently over \$500,000 in assets under management of the INvestABLE program.

What makes INvestABLE unique among other programs throughout the country is not just in the numbers. INvestABLE offers its account holders a checking option, which allows beneficiaries to have direct access to their funds. INvestABLE introduced the CollegeChoice 529 'UGift' feature to the ABL accounts—an online gifting platform that allows anyone (ie. family, friends, employer, etc.) to contribute to a beneficiaries account via a unique UGift Code. A person can use their INvestABLE Indiana account to help save for future expenses in retirement, long-term care needs, and any expenses that relate to that person's disability and improved health, independence or quality of life. Finally, INvestABLE offers systematic withdrawals so a person can make direct, automatic payments for expenses such as housing/rent.

With such a successful inaugural year, one might wonder how INvestABLE can take the program to another level in 2018. The year will kick-off with a one year anniversary celebration in which Kelly Mitchell, Indiana Treasurer of State, will be traveling to Carey Services (Marion, IN) and Erskine Green Training Institute (Muncie, IN) to speak about the program and tour the respective facilities. 🏠



1. Treasurer Mitchell practices packaging gloves on the assembly line at Bosma Enterprises
2. Treasurer Mitchell interviews about INvestABLE Indiana on Inside Indy with Kelly Vaughn at WHMB TV
3. INvestABLE Indiana Executive Director Amy Corbin at LEGO Brickworld
4. Treasurer Mitchell tours Bosma Enterprises in Indianapolis
5. INvestABLE Indiana Executive Director Amy Corbin speaks to a group from The Arc at their Valentine's Day event at the Statehouse
6. Amy Corbin greets self-advocates from The Arc of Indiana at their annual Valentine's Day event at the Statehouse