**MT ABLE Committee Meeting**

**Minutes**

Date: July 24, 2024

Call to Order: Facilitator, Theresa Baldry

Roll Call

Present: Theresa Baldry, Mitch Bohn, Cathy Murphy, Kathleen Magone, and John Pavao

Old Business

Review and Approval of Previous Meeting Notes

The review and approval of the June and July meeting notes will be conducted at the September 4, 2024, ABLE Committee meeting.

Feedback on MontGuide update

John suggested this document undergo an accessibility review for ADA compliance.

Marsha Goetting (guest) solicited thoughts regarding combining or keeping separate ABLE and Trust MontGuides. The committee recommended keeping the guides separate to avoid overwhelming the reader with information. Marsha requested that this agenda item be brought back to the committee when she has an updated draft.

Amendments to MCA and/or ARMs (Need more info)

There was some discussion about future proposal to add an annual inflation adjustment to maximum contribution amount.

This item ties with New Business item regarding Senator Bogner. See New Business for additional information.

Review and discussion of ABLE plans Montanans are using

Cathy will follow up with National ABLE Alliance regarding customer service concerns.

Kathleen recommended we have two separate agenda items moving forward. We will add another item concerning Montanans using programs other than Montana ABLE.

Aug 14 Inaugural National ABLE Savings Day

Cathy reached out to Hannah Slusser in the Governor’s office, and she provided Cathy with a link (<https://gov.mt.gov/Documents/GovernorsOffice/Proclamations/>) to past proclamations and contact ([cole.koenig@mt.gov](mailto:cole.koenig@mt.gov)) to request a proclamation. We would likely need to send a draft of the proclamation for approval. However, it was decided to postpone until next year due to time constraints. This year, we will focus on social media and other opportunities to promote ABLE accounts. The committee will begin National ABLE Savings Day activities in April 2025.

New Business

Promotion of ABLE

John advised of conference sponsored by Vocational Rehabilitation in October, and he will reach out to inquire about sharing ABLE information at a table or booth.

Cathy advised Montana Empowerment Center IEP Bootcamps are beginning in August. It was requested that DDP provide representation. Staff will share ABLE information in addition to DDP information.

Theresa mentioned the DDP Conference sponsored by the Montana Counsel on Developmental Disabilities will take place in October. Theresa is a presenter at this conference and is happy to distribute ABLE information.

Cathy will provide a copy of MT ABLE brochure to committee members. She will also provide information from Mitch regarding the upcoming disability awareness forum on July 29th in Billings.

Contact with Senator Bogner

Theresa reached out to Senator Bogner and he expressed his desire to provide assistance for ABLE and support to Montana veterans.

The rules and conflicts of interest regarding lobbying were briefly discussed. It was decided that Kathleen would communicate with Senator Bogner regarding ABLE moving forward to prevent any conflicts of interest regarding lobbying.

Updates from National ABLE Alliance

Cathy presented news that the threshold for the number of accounts under the National ABLE Alliance was met which results in lower account fees for ABLE account holders. ($2.00 annually)

Montana ABLE account holders will receive an email on August 14th, National ABLE Savings Day to remind them to save.

Public Comment

Marsha Goetting expressed her appreciation for the work the ABLE committee is doing.

Next Meeting Date and Agenda Items

Next meeting to be held September 4, 2024, at 08:30am.

Agenda Items

Review and approval of the June and July meeting notes

Amendments to MCA and/or ARMs

Montana ABLE account customer service

ABLE program alternatives other than MT ABLE used by Montanans

Promotion of ABLE

Updates from National ABLE Alliance

Kathleen moved to adjourn. Cathy seconded.

Meeting adjourned at 11:38am.