

## AZ ABLE Oversight Committee Meeting Minutes

February 11, 2025

10:00am -11:00am

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In Attendance (via Google Meets):

Brittaney Chipley, AZ ABLE Executive Director

Jim Whallon, Committee Member

Emily Kile, Committee Member

Wendi Scharnhorst, Committee Member

Jeffrey Ong, Committee Member

1. Ms. Brittaney Chipley calls the meeting to order at 10:02am.
2. Ms. Chipley welcomes everyone, stating the purpose and role of the Committee and the Executive Director. Committee members introduce themselves.
3. Ms. Chipley explains that the Committee shall select a chairperson from the Committee's membership. Ms. Chipley asks for a motion to approve Jeffrey Ong as the new chairperson for a 4-year term. Ms. Emily Kile moves, and Ms. Wendi Scharnhorst seconds. There are none opposed, and the motion carries unanimously.
4. There is no update from Arizona Health Care Cost Containment System (AHCCCS). Ms. Kile asks if ABLE would be impacted by budget cuts, and Ms. Chipley advises no. Ms. Kile also asks about ending Medicaid payback here in Arizona. Ms. Chipley advised there is nothing pending, but she would like to work with Ms. Kile on getting something passed legislatively. Ms. Chipley will complete the necessary steps to start the process with Arizona Department of Economic Security (DES) legislative division.
5. Ms. Chipley asks for a motion to approve the meeting minutes for 5/9/24. Mr. Ong moves, and Ms. Wendi Scharnhorst seconds. There are none opposed, and the motion carries unanimously.

**Vote:**

Jim Whallon, Committee Member – Approve

Emily Kile, Committee Member – Approve

Wendi Scharnhorst, Committee Member – Approve

Jeffrey Ong, Committee Member – Approve

6. Ms. Chipley asks if there are any questions, comments, or concerns regarding the reports. Mr. Ong asks a question regarding Navajo County's decrease. Ms. Chipley explains a decrease is typically due to account(s) closing or transferring to a different program.
7. Ms. Chipley provides an overview of the 2024 Annual AZ ABLE customer service survey results. Ms. Chipley will provide Ohio STABLE with a copy. Mr. Ong and Ms. Scharnhorst asks for clarification about the distribution of the survey. Ms. Chipley explains the survey was sent to all account owners, and a survey link was provided in the 2024 AZ ABLE winter newsletter. Ms. Scharnhorst will assist with its distribution for 2025. Ms. Kile provides feedback and comparison of special needs trusts vs. ABLE accounts.
8. Ms. Chipley provides the following OH STABLE/partner states program updates:
  - a. STABLE/Partner States Account Milestone - STABLE Account has surpassed \$500,000,000 in assets under management (AUM)
  - b. Mobile App – Now available on Apple and Android (Google Play Store) – Vestwell Mobile App
  - c. Contribution Limits for 2025 - General Contribution limit: \$19,000; ABLE to Work limit: \$15,060; Lifetime Max Contribution: \$555,000
  - d. Next Partner State Meeting – 3.18.25 @10am
9. Ms. Chipley provides an overview of ABLE Savings Plans Network (ASPN). Ms. Kile asks is there is any discussion with increasing the \$100,000 SSI (Supplemental Security Income) asset limit for ABLE account owners. Ms. Chipley and Mr. Ong advised that they are not aware of this being a priority.
10. Ms. Chipley opens the forum for public comments. There are no public comments. Ms. Kile ask for the date of the next Committee meeting. Ms. Chipley advises that the next Committee meeting is 5/6/25 @10:00am.
11. Ms. Chipley adjourns the meeting at 10:41am.