

AZ ABLE Oversight Committee Meeting Minutes

May 16, 2023

11:00am-12:00pm (MST)

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In Attendance (via Google Meets):

Brittaney Chipley, AZ ABLE Executive Director
Robert B. Fleming, Committee Member, Chairman
Jason Alan Snead, Committee Member
Cassidy Taylor, Committee Member
Grahame Richards, Committee Member
Wendi Scharnhorst, Committee Member
Jeffrey Ong, Committee Member
Tara Cochran, AHCCCS Policy Team

1. Mr. Robert Fleming calls the meeting to order at 11:02am.
2. Mr. Fleming and Mrs. Brittaney Chipley complete a roll call.
3. Mrs. Chipley provides an update on AHCCCS' progress with ABLE training; June 27th is the scheduled start date for the training. Ms. Tara Cochran provides an update on AHCCCS' revised procedures for ABLE distributions and contributions. Ms. Cochran will send Mrs. Chipley an overview of the revisions.
4. Mr. Fleming motions to approve the meeting minutes for 4/4/23. There are none opposed, and the motion carries unanimously.
5. Mrs. Chipley asks if there are any questions, comments, or concerns regarding the reports, including the national comparison report.
6. The Committee unanimously votes to continue the marketing campaign if funding is secured. Mrs. Chipley and Mr. Cassidy Taylor will keep the Committee updated.
7. Mrs. Chipley provides the following program updates:
 - a. There are a few SSI accounts with balances nearing \$100,000. Accountholders will be notified twice, and Vestwell will facilitate the communications.
 - b. Upcoming Enhancements
 1. End of second quarter – Reports will be available on the online platform when it comes to reporting for entities.
 2. End of 2nd Quarter – Accountholders will be able to directly deposit SSA checks or any third-party checks; accountholders will be able to create a preset allocation (a percentage). STABLE will

communicate this enhancement to accountholders, and updated forms will be available on the website.

3. Recurring payments via third party check or electronic transfer forms are now available on the website. Any accountholders requesting recurring payments using the STABLE debit card will need to contact STABLE customer service.
8. Mr. Fleming opens the forum for public comments. There are none.
9. Mr. Fleming adjourns the meeting at 11:16am.