

AZ ABLE Oversight Committee Meeting Minutes

May 6, 2025

10:00am -11:00am

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In Attendance (via Google Meets):

Brittaney Chipley, AZ ABLE Executive Director

Leah Landrum Taylor, Committee Member

Emily Kile, Committee Member

Wendi Scharnhorst, Committee Member

Jeffrey Ong, Committee Member (Chairman)

Marisela Erichsen, Public Attendee

1. Mr. Jeffrey Ong calls the meeting to order at 10:06am.
2. Mr. Ong welcomes everyone. Ms. Brittaney Chipley explains that AZ ABLE is now housed under the Department of Economic Security's (DES) Office of Community Engagement (OCE) with Assistant Director Leah Landrum Taylor. Ms. Chipley introduces Senator Leah Landrum Taylor. Senator Landrum Taylor gives a few remarks.
3. Ms. Chipley asks for a motion to approve the minutes from 2/11/25. Ms. Emily Kile moves, and Mr. Ong seconds. There are none opposed, and the motion carries unanimously.
Vote:
Senator Leah Landrum Taylor, Committee Member – Approve
Emily Kile, Committee Member – Approve
Wendi Scharnhorst, Committee Member – Approve
Jeffrey Ong, Committee Member – Approve
4. Ms. Chipley asks if there are any questions, comments, or concerns regarding the reports. Mr. Ong asks a question regarding booking outreach events. Ms. Chipley explains that the awareness of outreach events is through word of mouth and the attendance of previous events. She also explains that she will now be utilizing OCE's Outreach Event Tracker. Senator Landrum Taylor further explains the event tracker and its benefits, proposing that a team member from OCE presents at the next meeting. Ms. Chipley will follow up with OCE to present at the next meeting.
5. Ms. Chipley provides an update on language preferences. The first set of languages are live on the Enrollment and Account Management sites. To access these, a participant will need to scroll to the bottom of the page and look in the right corner for the English title. Initial languages include Spanish, Mandarin, Korean, Russian, Italian, Portuguese, French, Polish. Additional languages will include Cantonese, Arabic, Yiddish, Bengali, Haitian Creole, Urdu, Vietnamese, Tagalog, Farsi, Armenian, and others.

Ms. Chipley provides an overview of Vestwell's newsletter, explaining the difference between their newsletter and AZ ABLE'S quarterly newsletter. Ms. Kile requests that the FAQ's on the website have a language preference option; Ms. Chipley will follow up with OH (OHIO) STABLE with that request, along with the option to opt out of receiving the newsletter.

6. Ms. Chipley provides an update on the ENABLE Act and 2025 TMTS (Treasury Management Training Symposium) Conference.
 - a. ENABLE Act (HR 1436; S 627) - Senators Schmitt and Britt introduced the ENABLE Act the end of February: [ENABLE Act Press Release](#); [ENABLE Act Bill Text](#); 12 House co-sponsors; 15 Senate co-sponsors (Senator Mark Kelly of AZ); The ENABLE Act makes 3 ABLE benefits/provisions permanent from the Tax Cut & Jobs Act of 2017:
 1. ABLE to Work
 2. 529-to-ABLE Rollovers
 3. Saver's Credit
 - b. 2025 TMTS (Treasury Management Training Symposium) Conference (June 2-5 in Baltimore, Maryland) - Ms. Chipley will be attending the ABLE track training - legislative and regulatory updates, governance and fiduciary responsibilities, outreach to stakeholders, enrollment strategies, and other ABLE initiatives will be discussed. Ms. Chipley will be an ABLE ambassador, partnering with new attendees to be a point of contact. Mr. Ong will also be in attendance.
7. Mr. Ong opens the forum for public comments. There are no public comments. Senator Landrum Taylor adds that OCE has an outreach "heat map". Ms. Chipley will follow up with a team member from OCE to receive it and include it in the upcoming presentation.

Ms. Kile asks about when account owners receive AZ ABLE's quarterly newsletter. Ms. Chipley explains that all account owners with registered emails receive newsletters, and they have an option to opt out. Ms. Kile further asks about an email, and Ms. Chipley will follow up with her.
8. Mr. Ong states the next AZ ABLE Oversight Committee Meeting is August 28, 2025 @11am. He asks for a motion to adjourn the meeting. Ms. Kile motions to adjourn, Ms. Wendi Scharnhorst seconds. There are none opposed, and the motion carries unanimously. The meeting adjourns at 10:27am.

Vote:

Senator Leah Landrum Taylor, Committee Member – Approve
Emily Kile, Committee Member – Approve
Wendi Scharnhorst, Committee Member – Approve
Jeffrey Ong, Committee Member – Approve