

## AZ ABLE Oversight Committee Meeting Minutes

August 28, 2025  
11:00am -12:00pm

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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)

April Jones, DES Office of Community Engagement Community Outreach Manager

1. Mr. Jeffrey Ong calls the meeting to order at 11:00am.
2. Mr. Ong welcomes everyone, and introductions are completed by those in attendance.
3. Ms. April Jones provides an overview and presentation of DES Office of Community Engagement's (OCE) community engagement tracker and "heat map". She clarifies questions about event invitations, the awareness and connections of events, the heat map in relation to DES quarterly informational forums, and how attendance is tracked, which is tracked using Salesforce. Ms. Jones additionally explains that the community engagement liaisons are brand ambassadors who typically mainly attend free events, and one team member searches for events statewide.
4. Mr. Ong asks for a motion to approve the minutes from 5/6/25. Ms. Emily Kile moves, and Ms. Wendi Scharnhorst 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
5. Ms. Brittaney Chipley explains that while there was an unofficial agreement between the Committee to move forward with submitting a proposal to exempt ABLE accounts from Medicaid Recovery in Arizona, the Committee should officially vote to continue moving forward. Ms. Chipley and Ms. Kile explain Medicaid Recovery, highlighting its impact and the importance of proposing a legislative change to exempt ABLE accounts from Medicaid Recovery in Arizona. Ms. Chipley will contact DES Legislative Services to see if a final draft of the legislative proposal can be shared with the Committee.

Mr. Ong asks for a motion to approve moving forward with submitting a proposal to exempt ABLE accounts from Medicaid Recovery in Arizona. Ms. Kile moves, and Ms. Scharnhorst 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

6. Ms. Chipley asks if there are any questions, comments, or concerns regarding the reports. There are none.
7. Mrs. Chipley provides an operations update on the entire Ohio STABLE program. Updates include:

- a. Milestone Numbers

1. Accounts: 49,000
2. Assets Under Management (AUM): \$600M
3. Average Account Balance: \$12,260

- b. Fee Updates – STABLE has extended their contract with program manager, Vestwell, and with that came negotiation with program fees.

Messaging will go out to all account holders. Fee updates include:

1. Account Maintenance Fee - \$20/year (decrease from \$20/year)
2. Rollover out of STABLE - \$25 (new fee)
3. ACH Fail/Returned Checks - \$25 (new fee)
4. Paper Statement Delivery, per account per year - \$20/year (increase from \$10/year)
5. Re-issue of disbursement checks - \$15 (new fee)
6. Overnight mail - \$30
7. Outgoing wire - \$15 (new)

Mr. Ong asks if there has been any pushback from the new rollover fee.

Ms. Chipley states not yet because these are recent changes effective 7/1/25, but it will be interesting to see if there are any.

- c. Enhancements/Changes

1. STABLE call center has been migrated from Bank of NY Mellon (BNY) to Vestwell - reporting on this area will become more “robust”
2. Vestwell is now processing all paper documents (previously BNY) – paper documents will now have faster processing timelines
3. The request and issuance of a True Link/STABLE Visa Card has now significantly been reduced from 21 business days to 2 or 3 business days
4. Account holders will now receive enhanced reversal reasons in email responses when there is a request to reverse a transaction
5. The creation of log in credentials has been moved to the beginning of the enrollment process
6. The enrollment and account sites are now in 20 different languages

7. Account holders and account administrators can now generate an on-demand account statement for any time period
8. Mr. Ong opens the forum for public comments. There are no public comments.
9. Mr. Ong states the next AZ ABLE Oversight Committee Meeting is November 4, 2025 @11am. He asks for a motion to adjourn the meeting. Ms. Scharnhorst motions to adjourn, Ms. Kile seconds. There are none opposed, and the motion carries unanimously. The meeting adjourns at 11:45am.

**Vote:**

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