

ABLE Account Advisory Board Minutes

June 16th, 2020 – 1st Meeting

Members Present:

Chairman Gerhardt

Marge Barnheiser

Jennifer Cunningham

Director Jeff Davis

Blaine Brockman

Roy Cherry

Matt Curoe

Minutes:

The meeting was conducted virtually via Microsoft Teams. A quorum was present and Chairman Gerhardt called the meeting to order at 11:05 a.m.

Without objection, the minutes from the previous meeting were approved.

Zach Haughwout, Director of STABLE Account, provided a program update; which included an RFP update, 2020 goals, Partner State Efforts, and information on dormancy mitigation.

Tom Hatch, Operations Manager, provided an update on the increase in account enrollments as well as assets under management and total contributions.

Doug Jackson, Deputy Director, gave an update on outreach activity.

Eric Ochmanek, Director of Special Projects, gave an update on the national ABLE landscape.

Without objection, the meeting was adjourned by Chairman Gerhardt at 12:03 p.m.