

ABLE Advisory Committee Meeting

2:00pm March 21, 2017

The Office of the State Treasurer, 7th Floor, 55 Elm Street, Hartford CT

In attendance

Deputy Treasurer Lawrence Wilson
Assistant Treasurer for Policy Mary Phil Guinan
Commissioner Amy Porter, DORS
Deputy Commissioner Toni Fatone, DAS
Linda Blackburn
Marina Derman
Jack Frost
Sharon Geanuracos
David Guttchen
Kevin Lawton
Bill Pierce
Joe Shortt
Kerry Tedford-Coles

Emily Bjornberg, OTT
David Barrett, OTT
Lydia Neals, OTT

By Phone

Jessica Carroll, on behalf of Mark Shok

Deputy Treasurer Lawrence Wilson called the meeting to order at 2:05 p.m.

Kerry Tedford-Coles made a motion to accept the minutes from the January 17, 2017 ABLE Advisory Committee meeting. Toni Fatone seconded the motion. The motion passed unanimously.

The committee reviewed the proposed RFI for Connecticut ABLE services. Jack Frost raised a question about the length and level of detail in the RFI. Deputy Treasurer Wilson explained that the responding states have been asked for similar information in other RFIs and may ask their program vendors to complete the RFI.

Kerry Tedford-Coles raised the fact that many states are in the position of needing additional accounts and assets under management, and may be prepared to offer a considerable amount of detail. Amy Porter responded that the RFI introduction should point out that we do not need a deep dive on every question. Sharon Geanuracos pointed out that questions resulting from the RFI responses should be made available to all ABLE bidders. David Barrett agreed.

Kerry Tedford-Coles and Jack Frost volunteered to be on the RFI response review committee with OTT staff, Deputy Treasurer Wilson, Assistant Treasurer Mary Phil Guinan, David Barrett and Emily Bjornberg,

Deputy Treasurer Wilson asked all committee members to submit changes to the RFI by no later than the end of business on March 22, 2017.

Mary Phil Guinan gave a brief update on one piece of ABLE-related legislation in CT: HB 7032: An Act Regarding the Office of the Treasury's Recommended Revisions to the Achieving a Better Life Experience Program. She presented the testimony given by Deputy Treasurer Wilson and Shelagh McClure in support of the bill and said it has been reported favorably out of committee.

Discussion ensued regarding the 2017 legislative session. Jack Frost and Marina Derman both mentioned that the budget is not easy for families who have members with disabilities. They are heartened, however, by the number of non-budget related bills that are moving forward that would defend the rights and dignity of people with disabilities.

Bill Pierce gave an update in regards to the dropping of services for mental health patients in Connecticut this session.

Kerry Tedford-Coles discussed the lack of movement on the federal level regarding bills that affect rollovers between 529 and 529a accounts.

Deputy Treasurer Wilson proposed the next meeting date be scheduled for May 16, 2017 to hear about the RFI responses. There would not be a meeting in April. The committee agreed to cancel the April meeting.

Kevin Lawton passed out information from his office, which is seeking to disseminate accurate information about ABLE services to Connecticut families with disabilities.

Jack Frost made a motion to adjourn. Kevin Lawton seconded the motion, which passed unanimously.

The meeting adjourned at 2:50 p.m.