

ABLE Advisory Committee Meeting

2:00pm January 17, 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

Deputy Commissioner Toni Fatone

Jack Frost

Marina Derman

Kerry Tedford-Coles

Sharon Geanuracos

David Guttchen

Shelagh McClure

Emily Bjornberg, OTT

Lydia Neals, OTT

David Barrett, OTT

By Phone

Steve Pintarich

William Pierce

Linda Blackburn

The meeting was called to order at 2:05pm.

Mary Phil Guinan gave opening remarks and asked everyone to introduce themselves.

Kerry Tedford-Coles made a motion to accept the minutes. Amy Porter seconded the motion. The motion passed unanimously.

The committee reviewed the statutorily obligated annual reports for ABLE. There were no specific questions or comments on the filed reports.

Mary Phil Guinan reviewed the CalABLE survey which estimated what kinds of people California is trying to serve. The committee entertained a discussion regarding whether or not to implement a similar survey in CT and how best to improve it.

Kerry Tedford-Coles and Lisa Rowland liked the idea as a marketing and communication vehicle that would let people know that a CT ABLE program is in development. Kerry Tedford-Coles also raised the issue of timeliness. Any survey needs to come back in a timely manner and deliver information that is pertinent to the design of implementation for the program.

Jack Frost stated that CT ABLE needs to be timely, and protect the rights of our citizens in a fully-encompassing manner.

Shelagh McClure stated that this survey should not become a hurdle to timely delivery of services. We are all resource constrained and need to bear that in mind. She expressed concern as to whether the survey would garner enough responses to be a real factor in the design of the RFI.

Toni Fatone asked whether UConn might be able to assist with the survey. Shelagh McClure agreed to communicate with the university to find out.

Amy Porter encouraged the committee to consider a survey as a way to advertise ABLE in CT as rather than a method to flesh out statistics in regards to families with disabilities across the state of Connecticut.

The committee agreed that the first priority now is to get out an RFI. Mary Phil suggested tabling the discussion until the February meeting in order to maintain the focus on moving the RFI forward.

Bill Pierce introduced a two-page document regarding ABLE that he could pass out to constituents. There was broad discussion throughout the committee regarding messaging. Jack Frost made the point that we should have one point of reference for all constituents, and that point should be the Office of the Treasurer. The committee agreed that there should be a balance here in terms of messaging. We must leverage existing contacts into the disability community while at the same time honoring the fact that OTT has been charged with solely implementing the program.

Information was distributed regarding bi-partisan legislation introduced in the U.S. House of Representatives that would authorize roll-overs of funds in 529 accounts to ABLE (529a) accounts. Mary Phil Guinan said staff will continue to monitor legislative developments in DC.

The next meeting is scheduled for February 14, 2017.

Bill Pierce made a motion to adjourn. Toni Fatone seconded the motion which passed unanimously.

The meeting adjourned at 3:00.