

HDI SEMINAR SERIES

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ABLE Accounts and other Financial Planning Tools: The Importance of Developing a Financial Identity

Friday, March 3, 2017 1:00 – 3:00pm EST

UK Coldstream Research Campus

Human Development Institute Training Room

1525 Bull Lea Road, Lexington KY 40511

Please join us in person or online via videoconference. A link to the live video stream of the seminar will be sent to registrants.

Presenters

Carolyn Wheeler has over thirty years of experience working with families and persons with disabilities. Since 1999, she has worked as a Project Director with the Human Development Institute (HDI) where she has trained numerous individuals in the Personal Futures Planning Process.

Dave Matheis has over thirty-five years of experience working with families and persons with disabilities. Since 2004, he has been the Program Planning and Development Branch Manager for the Kentucky Office of Vocational Rehabilitation.

Samara Heavrin, STABLE Kentucky Coordinator, OJ Oleka, Chief of Staff for the Office of Kentucky State Treasurer Allison Ball, and Karen Perch, Ph.D., J.D., Executive Director, Life Plan of Kentucky, Inc. will serve on the panel for the question and answer session.

Millions of persons with disabilities and their families are often relegated to a life of poverty as a result of not being allowed to build even the most modest levels of resources. Persons receiving supports through Social Security, Medicaid and other publicly-funded programs are often disqualified from those supports if they have more than \$2,000 worth of countable resources or assets. ABLE accounts allow eligible individuals with disabilities to save up to \$14,000 a year in an ABLE account without jeopardizing their eligibility for federally-funded means tested benefits, such as Supplemental Security Income (SSI) and Medicaid. This seminar will provide information on both ABLE accounts, with a particular emphasis on Kentucky's ABLE program, as well as Life Plan of Kentucky, Inc., Kentucky's pooled special needs trust program.

Learning Objectives:

1. Participants will learn the value of financial education and asset development specific to persons with disabilities and their families.
2. Participants will be able to identify at least three asset development strategies for persons with disabilities.
3. Participants will be able to identify at least three organizations or programs in Kentucky that can assist persons with disabilities with financial education and asset development.

CEU's are pending in Rehabilitation Counseling in conjunction with the Kentucky Office of Vocational Rehabilitation.

Registration: Electronic registration will open **February 3, 2017**. Visit [HDI Seminar Registration](#) to register for the seminar. For help registering, contact walt.bower@uky.edu