

Manage the Finances of ABLER Beneficiaries in a New and Easy Way

ABLE accounts can be a life-changing savings opportunity, helping to create financial freedom and equity for people living with disabilities. If a beneficiary is unable to open or manage their account, an individual or Organization Authorized Legal Representative (ALR) can act on their behalf.

If you are a Representative Payee for your clients, placing funds in the ABLER account can:

- ✓ Assist in managing asset limits and prevent suspension of Social Security benefits.
- ✓ Enable organizations to quickly change the person with authority to manage accounts if/when an employee within the organization leaves/changes positions
- ✓ Provide easy access to transactions and records if you are ever required to complete a report by the SSA

If your Organization manages the finances of clients who have disabilities, and/or serves as the Representative Payee as designated by the Social Security Administration, enrolling as an Organizational ALR in an ABLER program can help the people you support save and invest for their future.



Registering Online is Easy

The online registration process for an Organizational ALR consists of:

1. Information about the Organization and Beneficiary
2. Documentation upload and verification

After the Organization's documentation is submitted and approved, registration can be completed and beneficiaries can be enrolled.

Information Needed to Register

To register, you will need to provide information that establishes the ability for your organization to act as an ALR. The key information includes:

About the Organization

Basic Information – Provide formal Organization name, EIN, Organization type, address, contact details, and documentation (varies depending on Organization type)

Controlling Officer Information – requires a government-issued ID for the Controlling Officer

Beneficial Owner Information – required only if the Organization is a for-profit business.

Agent Assignment Information – Authorize a Primary and/or Secondary Agent to act on behalf of the Organization and provide instruction

About the Beneficiary

Basic Information – Identify the beneficiary/account owner

Relationship to the Beneficiary – Identify the organization and the source of their authority to act as ALR (e.g. Power of Attorney, Guardianship, Representative Payee, etc.)

Provide communication preferences

Eligibility Confirmation – Provide the Beneficiary's diagnosis code as defined by the form and confirm the Beneficiary's eligibility to have an ABLER account

Further Documentation

Once you have completed the application and verification, you will need to provide designated documentation to verify your organization. **The following validating documents are required:**

Nonprofit Organizations

- ✓ One of the following documents:
 - Certified Articles of Incorporation of the Organization
 - U.S. Internal Revenue Code Sec. 501(c)(3) Exempt Organization Affirmation
- ✓ Organization Resolution of Signing Authority
- ✓ Government-issued photo ID for the Controlling Officer and any persons assigned as Primary or Secondary Agents

For-profit Organizations

- ✓ One of the following documents:
 - Certified Articles of Incorporation of the Organization
 - Latest audited financial statements
- ✓ Organization Resolution of Signing Authority
- ✓ Government-issued photo IDs for the Controlling Officer and Beneficial Owner(s), and any persons assigned as Primary or Secondary Agents

Other acceptable forms of identification for organizations:

- ✓ Determination Letter
- ✓ General or Limited Partnership Agreement
- ✓ Trust Instrument - Letters of Trusteeship or Executorship
- ✓ A government-issued business license
- ✓ A published annual report
- ✓ 10-K or other information contained on [the U.S. Securities and Exchange Commission Website](#), the websites of various self-regulatory organizations (i.e., FINRA), or from other governmental source

Government Organizations

- ✓ Organization Resolution of Signing Authority
- ✓ Government-issued photo ID for the Controlling Officer