

Working Together: Texas ABLE Accounts and Special Needs Trusts

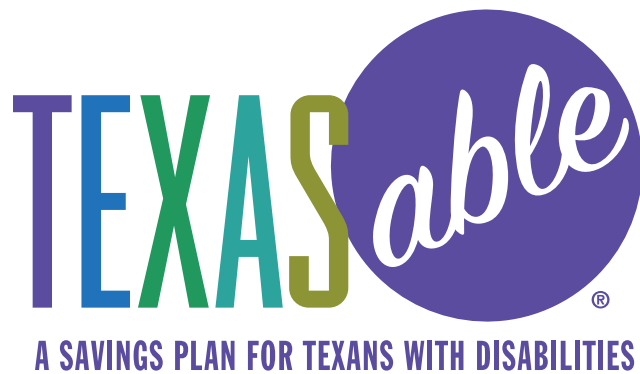
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Topics

- History of ABLE
- ABLE Program Basics
- Texas ABLE Program Highlights
 - Enrollment
 - Investment Options
 - Contributions, Withdrawals and Fees
- Working Together: ABLE Accounts and Special Needs Trusts
- ABLE Reporting Requirements
- ABLE Legislative Update

Before We Begin

This presentation provides highlights of the Texas ABLE Program. Our office cannot provide legal, tax, financial, benefit or investment advice, or advice regarding penalty avoidance under applicable tax law. Contact your attorney, financial advisor or tax expert regarding your specific legal, tax, financial, benefit, or investment situation.

Read the Program Disclosure Statement and Participation Agreement for detailed information about the program.

History of ABLE

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Also available as part of the eCourse

[How the Texas ABLE® Program Works with a Special Needs Trust](#)

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