

2023 Working Together: Texas ABLE Accounts and Special Needs Trusts

February 16, 2023 • STUDIO WEBCAST

Thursday Morning, Feb. 16, 2023

1:00 pm
1.00 hr

Working Together: Texas ABLE Accounts and Special Needs Trusts

Learn about the tax-advantaged Texas Achieving a Better Life Experience Program (Texas ABLE®), a disability savings program created specifically for Texans with qualifying disabilities. This session covers specifics about Texas ABLE and how it can be used in conjunction with Special Needs Trusts, while helping to preserve state and federal means-tested benefits, including SSI and Medicaid. Learn how recent regulatory and legislative developments have continued to expand the flexibility and impact of ABLE accounts.

Moderator:

Linda Fernandez, Texas Comptroller of Public Accounts - Austin, TX

Panelists:

Anna Mallett, Texas Comptroller of Public Accounts - Austin

Rob Percival, Orion Advisor Solutions - Omaha, NE

2:00 pm

Presentation Concludes