

# ABLE*Con*

AN OVERVIEW OF FLORIDA'S  
DISABILITY RESOURCES  
AND ABLE ACCOUNTS

[ableunited.com](http://ableunited.com)



## ABLE United Overview

Since our official launch in July 2016, ABLE United has provided over 10,000 Floridians, of all ages and [disability types](#), a new way to save through tax-free saving and investment accounts – an account allows for the saving of private funds that generally do not impact eligibility for current or future benefits.

Funds in an ABLE account can be saved with the help of family, friends and organizations through a gifting page – and may be used for [Qualified Disability Expenses](#) including everyday living expenses like groceries, housing and medical appointments or for future expenses like purchasing a car or house. Individuals can save up to \$17,000 each year in an account and those working have the opportunity to save even more through [ABLE to Work](#).

To get started, an individual must receive SSI or SSDI based on a disability that occurred prior to age 26 or self-certify that they meet the social security standards and have a severe disability. Types of disabilities that qualify include, but are not limited to, a diagnosis such as Down syndrome, autism, cerebral palsy, cognitive, developmental or mental health disorders.

Enrolling is all done online and is quick, easy and free.

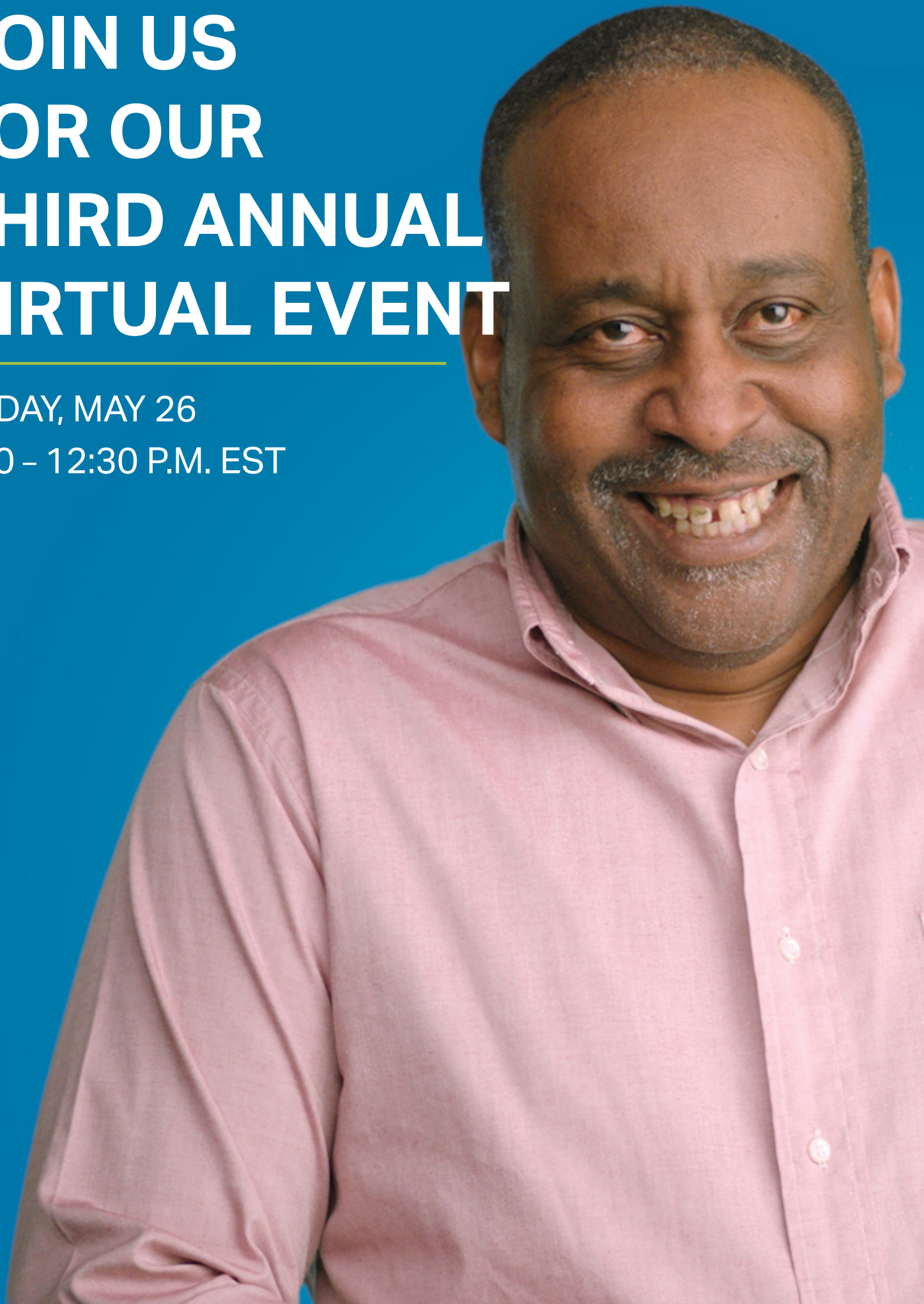
To get started or to learn more, visit [ableunited.com](https://ableunited.com). Resources are also available in Spanish at [ableunited.com/espanol](https://ableunited.com/espanol).

# JOIN US FOR OUR THIRD ANNUAL VIRTUAL EVENT

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FRIDAY, MAY 26

9:00 – 12:30 P.M. EST







## About ABLECon

We know there are a lot of resources available to the disability community, and navigating them can be overwhelming.

**ABLE accounts can serve as more than just a financial tool but can also work alongside other resources too – that's why we created ABLECon.**

For our third annual event, we are bringing a lineup of advocates and professionals together to discuss some of your most frequently asked questions on guardianship, special needs trusts, and benefits as they relate to ABLE accounts.

This virtual event is dedicated to educating the disability community on how and why an ABLE United account is right for them.

# Session Schedule

## 1. ABLE United 101

9:00 – 9:50 A.M. EST

ABLE United 101 is a crash course on the ins and outs of ABLE accounts. In this roundtable discussion, we'll cover a high-level overview of ABLE accounts, who is eligible, how it works with benefit programs like Supplemental Security Income and Medicaid, as well as the enrollment process.

### Presenters include:

- John Finch, Director of ABLE United
- Elizabeth Ricci, Parent and Advocate

## 2. A Guide to Special Needs Trusts and ABLE Accounts

9:55 – 10:40 A.M. EST

In this session, longtime disability advocate and Board Certified Elder Law attorney, Travis D. Finchum, will cover the basics on special needs planning – including topics like special needs trusts, coordination of government benefits, letters of intent, advance directives and ABLE accounts.

## 3. ABLE and Your Benefits: How SSA Works with ABLE Accounts

10:45 – 11:30 A.M. EST

In this session, we're going to be answering our most frequently asked question: how do ABLE accounts work with benefits?

A representative from the Social Security Administration will join us for a roundtable discussion on how ABLE accounts work

with public benefit programs, including Supplemental Security Income (SSI), and Social Security Disability Insurance.

### Presenters include:

- John Finch, Director of ABLE United
- Tina Williams, North Florida Public Affairs Specialist, Social Security Administration

## 4. An Overview on Guardianship

11:35 – 12:20 P.M. EST

In this session, Attorney Catherine Davey will take a deep dive into estate planning, the legal guardianship process, including alternatives to legal guardianship, as well as how ABLE accounts serve as a critical resource for individuals with disabilities.

It is our hope that you will join us for one, or all four of our sessions, to educate yourself on all things ABLE. Spanish Language and American Sign Language interpreters will be available for all sessions.

**REGISTER NOW**

# Get to Know Our Presenters



**John Finch**

**Director of ABLE United**

John Finch serves as the Director of ABLE United at the Florida Prepaid College Board in Tallahassee, Florida. John oversaw the launch and continued success of the ABLE United program. Previously he served at The Arc of Florida in various capacities including the launch of a dental program that seeks to help individuals with intellectual and developmental disabilities receive emergency dental care. With experience in both the non-profit social services field and financial sector, John continues to strive to make a difference in people's lives.



**Elizabeth Ricci**

**Parent and Advocate**

Elizabeth Ricci is an award-winning immigration attorney and has impacted the Tallahassee community through more than 20 years of pro bono service to foreign-born military veterans, widows, and abused children, to help them seek justice. Elizabeth also manages the ABLE United account for her daughter, Paloma, and has been an ABLE United brand ambassador since 2018.



**Travis Finchum**

**Board Certified Elder Law Attorney  
and Founder of Special Needs Lawyers, P.A.**

Travis D. Finchum has been practicing law since 1996 and has been a Board Certified Elder Law attorney since 2002. He is the President and founder of the law firm Special Needs Lawyers, P.A. Travis founded the Guardian Trusts in 2002 which assists individuals with disabilities in protecting their assets for use during their lifetimes without disqualifying them for much needed public benefits.

# Get to Know Our Presenters



## **Tina Williams**

### **North Florida Public Affairs Specialist, Social Security Administration**

Tina Williams has served as a North Florida Public Affairs Specialist since 2019. She began her career in 2007 as a Customer Service Representative in the Tallahassee, FL Field Office. Throughout her career, she has held a number of progressively responsible positions including both TII Claims Representative and T16 Claims Representative. In 2015, Tina relocated to Louisiana and she served a 120-day detail with the Dallas Region II Area Director's office processing Retirement, Survivor's and concurrent Disability claims for Louisiana and Texas. Following this detail in 2016, Tina relocated to Florida and served as a T16 Claims Specialist where she served as a mentor for staff until selected for her current position where her primary purpose is to educate the community on all SSA topics and promote available online services. Tina has received multiple Agency awards including the 2022 Deputy Commissioner for Operations Honor Awards for the Atlanta Region for her work on the Third Party Assistance Outreach Campaign team.



## **Catherine Davey**

### **Parent and Attorney**

For more than twenty-five years, Catherine Davey has practiced law. Catherine began practicing law near St. Petersburg, representing the State of Florida, Agency for Health Care Administration during their fledgling efforts to recover from estates in Florida for Medicaid liens. Since that time, she has been in practice here in Orlando. For the past eighteen years, she had her own firm and continues to focus her practice in the areas of probate, guardianship, guardian advocacy, estate planning and the drafting and implementation of Special Needs Trusts for the physically for those with physical and developmental disabilities.



# FOUR SESSIONS. ONE DAY.

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SPECIAL NEEDS TRUSTS,  
SOCIAL SECURITY,  
GUARDIANSHIP AND ABLE

