

Video Series on the ABLE Act- updated 9-11-2023 (DRAFT)

The ABLE Act has many uses – but in order to utilize this tool a great deal of education is necessary. A playlist on the ABLE Act can be viewed by going to <https://dalelawfirm.com/educational-videos/> and selecting **THE ABLE ACT**

Another way is to go to www.youtube.com/c/achievingindependence and look for the playlist called ABLE. Here are links to specific programs in the series:

Unique Issues for Special Needs Trust and CalABLE: This video presents the basics of the ABLE Act as well as Special Needs Trusts. Stephen Dale demonstrates, through a series of case studies, how a special needs trust tied to an ABLE Account can get the best of all worlds in many cases. This video was recorded as part of Connections California, a statewide project by Parents Helping Parents. Connections California offers information on adult transition topics to families and self-advocates who have disabilities. Find all adult transition resources at <https://www.php.com/transition-to-adulthood/>

CalABLE and Special Needs Trusts – co-presented by Dante Allen, Executive Director of CalABLE and Stephen Dale, Esq. and Trustee of the Golden State Pooled Trust at <https://youtu.be/ss-ibnJFGfU?si=mjesJhyJSddecFYd&t=2>

The ABLE Act with a Focus on Housing at <https://youtu.be/84CgDu1Eb4w>

Mary Eble of the Golden State Pooled Trust discusses how the ABLE Act can be used to assist an ABLE beneficiary with residential needs. One exciting thing about using an ABLE Account with housing needs for SSI recipients is that payments from an ABLE Account for food and shelter do not cause a reduction in SSI.

The ABLE Act and the Medicaid Lien at <https://youtu.be/Gd3UokkWJiQ>

This video reviews the Medicaid Payback which is a lien on an ABLE Account for any Medicaid used for medical purposes when the ABLE beneficiary passes away from the time the account is established. This segment explores what Medicaid services are subject to the lien, the factors that should be considered and how to minimize the chance of a lien.

The ABLE Act and Capacity Issues at <https://youtu.be/uCeJga6oisQ>

This video focuses on who is in charge of an ABLE Account and things that should be considered if the ABLE beneficiary lacks capacity or loses capacity.

The ABLE Act and Taxes

This is a 2-part program –

Part 1 explains gift and estate taxes <https://youtu.be/oKTIJuEfSXQ> .

Part 2 talks about income taxes and compares ABLE Accounts with special needs trusts <https://youtu.be/AsF9rz2ReCo>

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To see our YouTube Channel – go to

<https://www.youtube.com/c/achievingindependence>

Questions: email amy@dalelawfirm.com

Other ABLE Resources:

ABLE Accounts Availability

No matter where you live, you can open an ABLE account in any state that accepts residents outside their state. You can view all available programs at:

<https://www.ablenrc.org/select-a-state-program/>

ABLE National Resource Center: The ABLE NRC is the leading source of information and best practices regarding the ABLE program.

<https://www.ablenrc.org/>