



Program Summary:

The State of Delaware offers a low cost 529(a) savings plan – **DEPENDABLE** – that allows individuals with disabilities and their families to save for a broad range of expenses on a tax-advantaged basis without jeopardizing their benefits from supplemental security income (SSI), Medicaid and other federal programs. Eligible individuals can open an account for themselves, or an authorized individual can open an account on their behalf. The **DEPENDABLE** Program is administered through a consortium model with 18 other states through the recordkeeper, Ascensus.

DEPENDABLE Goals [Proposed]:

- Contributions and new account growth
- Customer service responsiveness for individuals with disabilities and their caregivers (SLA metrics)
- Enhanced platform accessibility and usability

Target Audience:

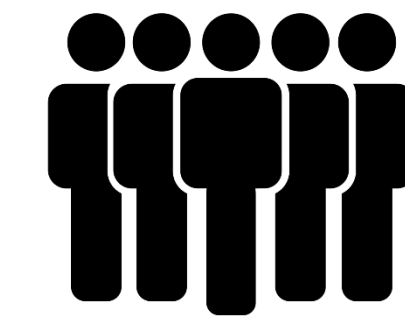
Delawareans who acquired their disability prior to age 26 and their caregivers

Fourth Quarter (2023) Highlights:

- **395 funded DEPENDABLE accounts as of December 31, 2023**
- **New accounts increased by 10% (38 accounts)** through Q4 2023 over the equivalent time period in 2022 with **total assets** at **\$4,069,288.41**
- **Net contributions [contributions less distributions]** through Q4 2023 at **\$850,136.43** a **19% increase**.

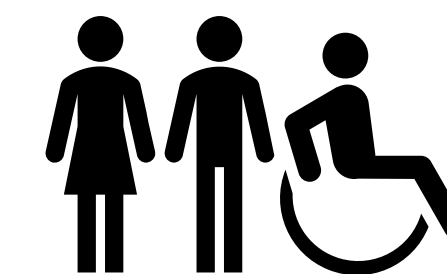
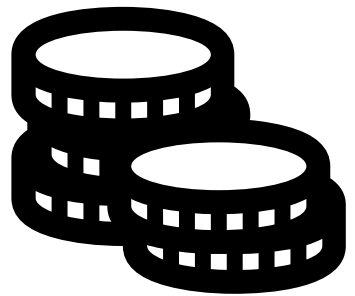
Upcoming Initiatives:

- Blue Rocks Autism Awareness Night, Thursday April 18, 2024
- Delaware Autism Program Transition Night April 25, 2024



**New
Accounts
+10%**

**\$4 M in
Total Assets**



**288
Account
Owners
Receive
SSI or SSDI**

