Strategic Objectives

September 2025

DELAWARE ABLE PLAN
DEPENDABLE
Security for the future™

1 Drive Greater Participation

Collaborate with program manager on marketing

Explore nonprofit partnerships

Expand opportunities with healthcare providers, schools and government agencies

Utilize DHSS funding for marketing opportunities

Raise awareness about the age adjustment coming January 1

2026 Goal:

150
new accounts

2 Grow Account Contributions

Promote the gifting service

Educate families on ABLE vs. competing products

Promote plan with State of Delaware employees, emphasizing direct deposit

Market the plan to employers

Provide education around the Delaware tax incentive

Partner with Department of Finance to enable direct deposit of tax refunds

2026 Goal:

250K
average plan-wide monthly contribution increase

3 Promote Plan Awareness

Engage the community at career fairs and local nonprofit events

Plan sponsorships (i.e. State Fair)

Identify and leverage press and influencer opportunities

Market other advantages of a 529a

Provide education on state and federal tax advantages

Market ABLE for veterans

2026 Goal:

10
Events & Sponsorships

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About **DE**PEND**ABLE**

Delaware's ABLE plan, also known as **DE**PEND**ABLE**, was established through the Delaware ABLE Act of 2015 under Section 529A of the federal tax code. It exists to encourage and assist individuals and families in saving personal funds for the purpose of supporting eligible individuals with disabilities with maintaining their health, independence, and quality of life.

In October 2017, the Board voted to join the National ABLE Alliance, a consortium of states that have pooled together to generate scale for their respective state Achieving a Better Life Experience (ABLE) savings plans/programs for persons with disabilities. Delaware launched its ABLE program in June 2018.

ABLE accounts enable beneficiaries to make periodic self-directed investment elections, and the program also offers an insured deposit account option.

Mission

To inspire and support individuals and families in building a secure financial foundation for disability-related expenses by driving participation, encouraging consistent contribution growth, and promoting awareness of the **DE**PEND**ABLE** Plan. Through targeted outreach, prudent investment oversight, and best-in-class plan management, we aim to empower participants to take an active role in planning for long-term independence, well-being, and quality of life.

About the Plans Management Board

The Plans Management Board oversees and administers the State of Delaware's ABLE Plan authorized under Chapter 96A within Title 16 of the Delaware Code.

About the Office of the State Treasurer

The Office of State Treasurer provides administrative support for the Board and works directly with Ascensus.

Fast Facts[1]

Assets

$7,800,584.83
▲ 76% YoY

YTD Contributions

$1,848,776.84
▲ 6% YoY

Accounts with a Balance

619
▲ 5.4% YoY

New Accounts

106
▲ 11.8% YoY

Average Balance

$12,504.38

Avg. Monthly Contributions

$226,520.01

SSI Recipients	SSDI Recipients
$9,274	$13,421

[1] As of 8/31/2025