



Oregon ABLE Savings Plan - cheat-sheet

Before you get started, make sure the beneficiary is eligible for an ABLE account.

To open an account, you'll need some basic information handy:

- Your email, which will become your Username to login to the ABLE account
- Basic info about the beneficiary, such as: birthday, home address in Oregon
- The beneficiary's Social Security Number or Taxpayer Identification Number
- Diagnosis code for Social Security Income (SSI) or Social Security Disability Insurance (SSDI) eligibility, or a signed diagnosis form from a licensed physician that proves an eligible disability or blindness was diagnosed before the age of 26

If you're an Authorized Legal Representative (ALR) filling opening an account for a beneficiary, we'll also need some information about you:

- Basic info about you, such as: name, birthday, home address
- The relationship to the beneficiary (To be an Authorized Legal Representative (ALR), you must have Power of Attorney, or be a parent/legal guardian of the beneficiary)
- Work status

After you confirm your identity by answering some secure questions, you'll verify your email and create a password to protect the account. To finish setting up the account, you'll:

- Customize the name
- Choose how to allocate your money
- Select an investment option (if you choose to invest)
- Set a target goal for the account
- Add money to start off the account, and set up monthly transfers if you want automatic transfers
- Enter the account and routing number to connect your bank to the account

After that, you're done. It only takes 10 minutes (or less, now that you know everything you need) to sign up for an ABLE account. Get started at www.OregonABLESavings.com