

**Minutes of the ABLA Advisory Committee Meeting**  
**October 17, 2017**

**Attendees:**

David Barrett  
Emily Bjornberg  
Jessica Carroll, DSS  
Marina Derman  
Deputy Commissioner Toni Fatone, DAS  
Jack Frost  
Sharon Geanuracos  
Mary Phil Guinan  
David Guttchen, OPM  
Kevin Lawton, DDS  
Shelagh McClure  
Commissioner Amy Porter, Department of Rehabilitation Services  
Lisa Rowland  
Christine Shaw

The meeting, held via teleconference, was called to order at 2:05 p.m.

Christine Shaw opened the meeting with welcoming remarks. She informed the group that Treasurer Nappier was scheduled to speak with Treasurer Read that afternoon regarding Oregon's selection as the preferred state with which to partner in establishing Connecticut's ABLA program, and to lay the groundwork for the implementation of the partnership. Ms. Shaw thanked the members of the RFI subcommittee for their work and invited committee members to continue their participation during the implementation phase.

Shelagh McClure informed the group that the Connecticut Council on Developmental Disabilities has a new executive director, who will likely want to be involved in promoting the ABLA program.

Lisa Rowland said that she would like to be involved with grassroots messaging across the state. She suggested that Treasury staff should go on a speaking tour in order to answer the many questions groups around the state will have. Mary Phil Guinan agreed that such presentations would be important and that other states have been successful with a "train the trainer" model to increase the number of presenters with expertise.

Ms. Shaw stated that work was underway to finalize the legal agreements necessary to launch the program. She estimated that once a memorandum of understanding with Oregon was finalized, as well as the agreement with Bank of New York Mellon, custodian of the ABLA plan assets, the Connecticut ABLA program would launch approximately four months thereafter. Ms. Shaw indicated that Treasury staff would share with committee members a timeline for implementation and a list of next steps.

Ms. Shaw specified the next steps, including a work session to review marketing materials. The consensus of the committee was that phone calls work better for updates and in-person meetings work best when a lot of input is desired.

Jack Frost made a motion to accept the minutes from the last meeting. David Guttchen seconded the motion which passed with one abstention from Ms. McClure.

Ms. Shaw moved to adjourn the meeting. The motion passed unanimously.

The meeting adjourned at 2:35 p.m.