

ABLE Account Expenditure

Date of Expenditure: _____

How is this expenditure related to the disability (or blindness) of the ABLE account owner?

How does this expenditure increase and/or maintain health, independence, and/or quality of life of the ABLE account owner?

How can this expenditure be grouped? (Check all that apply)

Education Housing Transportation Basic Living Expenses

Employment Training and Support

Assistive Technology and Personal Support Services

Health, Prevention, and Wellness

Financial Management and Administrative Services

Legal Fees

Expenses for Oversight and Monitoring

Funeral and Burial Expenses

Other Please explain: _____

If this is a housing expenditure, were funds spent the same month they were drawn from the ABLE Account?

NA Yes No (It is counted as a resource for SSI and Medicaid purposes)

A receipt, bill of sale, or similar document is attached to this document. (Remember to make a photocopy of machine printed receipts as these fade with time.)

Examples of Common ABLE Account Expenditures

Education

Tuition (pre-school through post-secondary)
School Supplies
Books
Tutoring
Meal Plans
Attendant Fees

Housing

Rent
Mortgage
Insurance
Property Taxes
HOA Dues
Utilities

** Housing expenses must be paid the same month
When the money is drawn from the ABLE Account

Transportation

Car payment/lease/titling/registration/insurance/fuel/maintenance
Bus
Taxi or Uber/Lyft/Ride Share
Train and Airplane Fares

Employment Training and Support

Job Coach
Continuing Education Classes
Costs Associated with Certifications, Licenses, Job Training
Tools of the Trade
Work Uniforms
Entrepreneur Start-Up Costs
Moving Expenses
Interview Preparation and Resume Development
Transportation to/from work
Financial Management Education and Assistance

Assistive Technology and Personal Support Services

Text-to-Speech (Dragon Dictate)
Screen Readers (Jaws)
iPhone/Smart Phone/Tablet
Cook
Housekeeper
Mobility devices
Home Automation
Augmentative Communication
Alerting Devices

Financial Management and Administrative Services

Tax Preparation
Financial Advisor
Legal Guardianship

Legal Fees

Attorneys' Fees
Court Filing Fees
Trust and Estate Planning

Expenses for Oversight and Monitoring

Guardianship
Financial Management Software

Basic Living Expenses

Food
Housing
Clothing
Household Supplies and Furnishings
Utilities

Funeral and Burial Expenses

Funeral
Casket
Burial or Cremation
Religious or Civic Official