

IABLE New Account Owner Checklist

Account Owner

Information needed for the Eligible Individual.

- Name
- Email
- Phone
- Address
- Social Security or Tax ID number
- Birth date
- Disability type
- Basis for eligibility
- Form of identification

Investments

Choose your investment option(s). Visit IAble.gov/investments for more information.

- Aggressive
- Moderately Aggressive
- Growth
- Moderate
- Moderately Conservative
- Conservative
- Checking

Authorized Individual

An Authorized Individual may open and manage an account on behalf of an Eligible Individual. If this applies, the following information is needed for the Authorized Individual.

- Name
- Phone
- Address
- Social Security or Tax ID number
- Birth date
- Form of identification

Contribution Method

Choose how you would like to contribute to the IABLE account.

- Bank Account
 - Routing Number
 - Account Number
- Paycheck (additional forms will be provided)
- Check (additional forms will be provided)

Visit IAble.gov/enroll to get started.

