Account Retrieval Guide for Organizations

About This Guide

The PA ABLE Savings Program has moved to Vestwell! This Guide explains how your Organization can retrieve and access all PA ABLE accounts being managed on Vestwell's new online platform with a single login. **Once logged in, you will no longer need a separate login for each account managed by your Organization.**

Summary

Only use this Guide if your Organization's name and EIN is tied to a PA ABLE account.

The "Control Person" for your Organization will need to be the first person to retrieve all PA ABLE accounts managed by your Organization. If you are unsure who your Control Person is, locate the Entity Signatory / Verification Form that your Organization originally signed and submitted to PA ABLE. That form names your Control Person. You may need to check with your Organization's leaders or ABLE account managers to find a copy of the form that was submitted.

The Control Person must use their **personal SSN** to retrieve accounts — not the organization's EIN. They will also need to enter the following information:

- Name
- SSN (not EIN/TIN) and DOB
- Address

Who Should Use This Guide?

PA ABLE accounts can be set up in several ways. How you retrieve an account depends on who is listed as its manager — the Account Owner or another person (called an “Authorized Individual”).

You should only follow this Guide to retrieve accounts that list your Organization as the Authorized Individual. That means that your Organization’s name and EIN is tied to the account, in addition to the Beneficiary’s name and SSN.

This Guide does *not* apply if:

The PA ABLE account was set up as a self-managed account, with only the Account Owner’s information and there is no other person or Organization registered on the account with management permissions. These self-managed accounts can only be retrieved with the Account Owner’s name and SSN.

OR

The PA ABLE account has an “Authorized Individual” listed as the account’s manager. An “Authorized Individual” is a person - not an Organization - other than the Account Owner who is designated to manage the account. The Authorized Individual’s name and personal SSN are listed on the account, along with the Account Owner. These accounts must be retrieved using the Authorized Individual’s name and personal SSN. Keep in mind: Even if you work for a support Organization, you may have opened a PA ABLE account using your personal name and SSN.

Account Retrieval Process

First, Locate your Entity Signatory / Entity Verification Form

When your Organization originally registered with PA ABLE, it may have submitted an entity verification / certification form, listing your Organization's EIN, address, users, and more. Most importantly, this form names your Organization's "Control Person" – someone in leadership with the authority to manage and direct your Organization. Locate your copy of the form, and determine who is identified as your Control Person. **This person must complete the account retrieval process (instructions below).**

1. **Visit https://connect.vestwell.com/signup/paable/retrieve.**
2. **Enter the Control Person's email address.** This is the email address they will use to log in to the PA ABLE account portal in the future.
3. **Set up a password.**
4. **Enter the Control Person's information on the "Verify your identity" screen.**
   - The Control Person must input their personal SSN, date of birth, and address on this page. Do not use the Organization's EIN.
   - Click "Verify with text" or "Verify with call," and complete the prompts.

During retrieval, if you receive an error like the one below, a few things might have happened. Try the troubleshooting tips below:

We couldn't find an account with this information. Try again.

1. Your Organization's Control Person may have changed at some point. Confirm if another person at your Organization has authority to manage ABLE accounts and sign for the Organization.
2. The accounts you manage were never set up under your Organization. In this case, the accounts may have been set up using only the Account Owner's information, or using another Organization employee's personal information. You can try inputting the Account Owner's information. An individual employee can also try inputting their personal information.
   - If the above method works, please contact our support team so that we can correctly register the accounts in your Organization's name. This way, you will also be able to access all of the ABLE accounts you manage under a single login.

If you are still unable to access your account(s) please contact PA ABLE support at:

Phone: 855-529-ABLE (2253) | Hours: Monday – Friday, 9:00 AM – 8:00 PM ET

After Retrieval

Once retrieval is successful, the Control Person will be taken to the new PA ABLE online portal. The Control Person will have full "Administrator" permissions in the portal where they can:

1. Access the Organization's dashboard.

Once logged in, the Control Person will see a dashboard displaying all PA ABLE accounts that are associated with the Organization. **You will no longer need a separate login for each account managed by your Organization.**

It is possible that some accounts associated with your Organization will not appear in the dashboard, if the account was not registered correctly when it was opened. Please contact PA ABLE if you are experiencing issues.

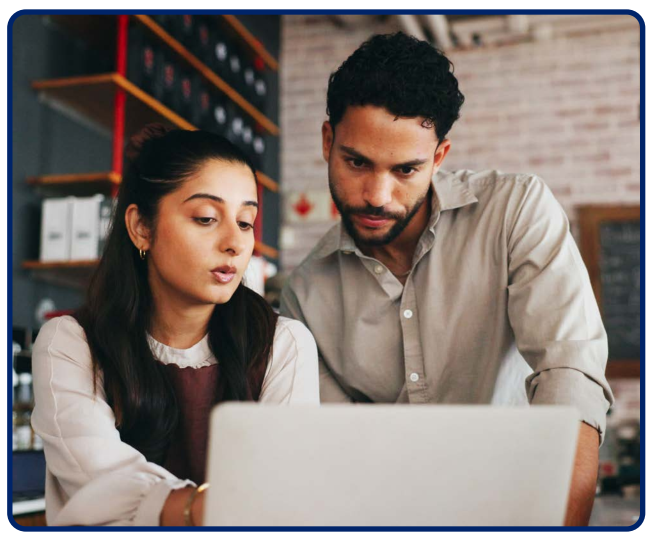
2. Add employee Agents (optional).

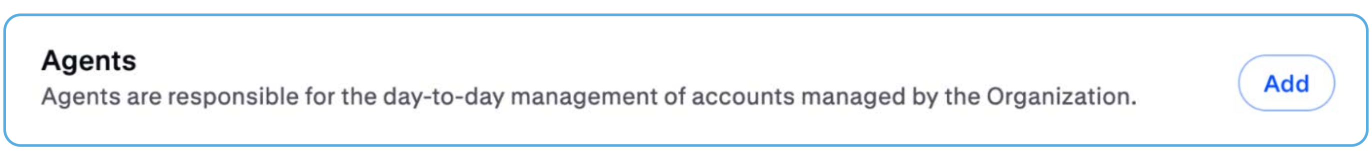
The Control Person can invite other employees (called "Agents") to access the PA ABLE portal and help manage accounts. See "Adding Agents" below.

Adding Agents

After the Control Person retrieves the organization's accounts, they can grant other staff members access by adding them as an Agent of the Organization. Agents can view, open, and/or manage accounts within the limits set by the Control Person.

To add an Agent, navigate to the Profile menu in the top right-hand corner of the Vestwell platform. Select the **"Organization"** menu. Click the "Add" button in the Agents area:





Once your Agent is added, click the three dots next to their name and select "Accounts." Then click "New User." A drop-down menu will appear. You can select any user in your Organization and grant them access to individual ABLE accounts, at custom permission levels.

Contact and Support

If you have questions or need assistance, contact the PA ABLE support team. When reaching out, please include:

- Your Organization's name and EIN
- The name and contact information of your Control Person, if known
- A brief description of your question or issue

PA ABLE Support

Website: paable.gov

Phone: 855-529-ABLE (2253)

Hours: Monday – Friday, 9:00 AM – 8:00 PM ET