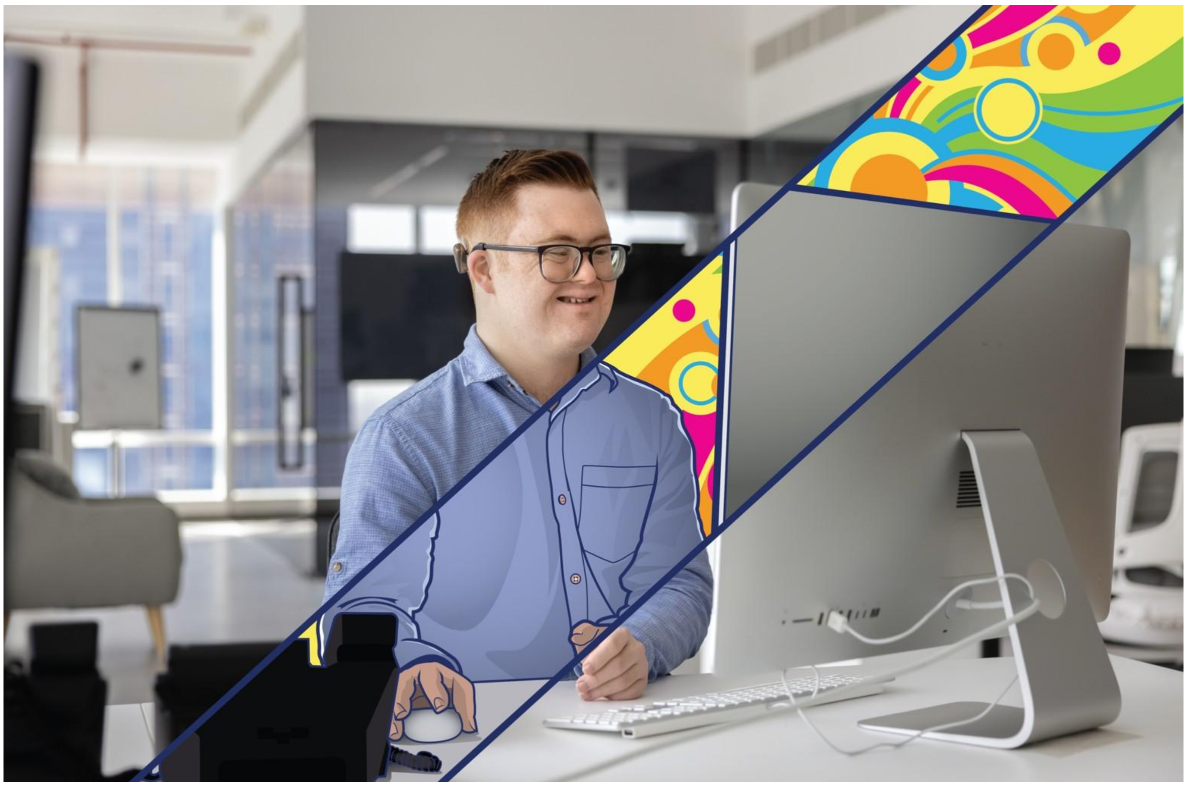
July 14, 2026 - Please note only accounts with an authorized individual received this email.

Important Update: Account access for Authorized Individuals and Interested Parties is Changing!

Get ready for changes to 3rd party account access.



PA ABLE account access for certain Authorized Individuals and all Interested Parties is moving online!

We recently shared news about PA ABLE moving to a new program manager, Vestwell. This change brings meaningful improvements to your PA ABLE experience.

You had previously provided account access to a third party (parent, sibling, friend, advisor, etc.) as either a secondary “Authorized Individual” or an “Interested Party.” This access allowed them to obtain information about your account over the phone or process transactions via paper form.

<u>You will need to re-establish any third-party access to your account after the transition to Vestwell</u>. As a reminder, you are responsible for monitoring the activities of third parties to whom you grant account access, as well as keeping their permissions up-to-date.

Beginning on **July 28, 2026**, you will be able to easily re-add those users to your account from the new PA ABLE online account platform. **Best of all – those users will now be able to access the account online! Users can view or interact with your account via *their own secure login***.

You can assign a variety of custom permission levels to each user, from view-only access up to transactional access.

How to request access for additional users on the new PA ABLE platform:

- Log in to your account at **paable.gov**
- Click on your name in the upper right corner of the account dashboard
- Select "Manage Access"
- Click on "New User"
- Input the required information
- Choose the appropriate role and level of access (see Permission Levels table, below
    - **Important:** ***"Account Manager"*** access (which includes the ability to make withdrawals) requires a **Notarized Power of Attorney (POA) Form** to be submitted by the additional user when they create a login. If you are re-establishing access for someone who has previously submitted a POA form, you do not need to resubmit the form.*
- **Interested Parties will no longer receive copies of quarterly or year-end statements in the mail.** They will be able to log in online to view, download, or print those documents.

Beginning on July 28, 2026, you will be able to choose from the following Permission Levels for Additional Users:

<u>Viewer Permission Level</u>

- POA form not required
- Can download statements
- **Cannot** make contributions

- **Cannot** manage investments
- **Cannot** make withdrawals
- **Cannot** update account information

<u>Contributor Permission Level</u>

- POA form not required
- Can download statements
- Can make contributions
- **Cannot** manage investments
- **Cannot** make withdrawals
- **Cannot** update account information

<u>Account Manager Permission Level</u>

- POA form required*
- Can download statements
- Can make contributions
- Can manage investments
- Can make withdrawals
- Can update account information

Have questions?

We're here for you. Give us a call Monday–Friday from 8am to 5pm ET at 855-529-ABLE (2253) or email us at **transition@paable.gov**.

Continue to visit **paable.gov/updates** for additional information and the latest updates related to this transition.

We're excited to continue helping you power your life experiences with an even stronger PA ABLE. Thank you for being an account holder and entrusting us to help every PA ABLE account holder achieve a better life experience.

Sincerely,
PA ABLE Savings Program

---

paable.gov | **855-529-ABLE (2253)** | Stacy Garrity, State Treasurer

**POA Forms are only required for new additional users with Account Manager access. The new additional user will be prompted to upload this form when they create their login. If you are re-establishing access for someone who has previously submitted a POA form, you do not need to resubmit the form.*

The Pennsylvania ABLE Savings Program is administered by the Pennsylvania Treasury Department. Before investing, please carefully read the Disclosure Statement (available at paable.gov or by calling 855-529-2253) to learn more about the program, including its effect on federal and state benefits, investment objectives, risks, fees, and tax implications.

613 North Dr | Room G-06 | Harrisburg, PA 17120