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**JUNE 17, 2025**

**AGENDA ITEM 3  
INFORMATION ITEM**

**CALIFORNIA ABLE ACT BOARD**

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Review of CalABLE Program Quarterly Report (1Q25)

***Background***

The CalABLE Act Board and its program administrator, Vestwell State Savings, LLC, will review CalABLE Program Updates for First Quarter Report of 2025. This will include:

- Customer Service Center Updates
- Recent Enhancements
- CalABLE App
- Future Enhancements

***Presenter***

David Bell, Vice President, Vestwell State Savings, LLC

***Attachments***

- Attachment #1 – CalABLE Program Report (1Q25)

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# Board Meeting

June 17, 2025



# Agenda

- Insourcing - Customer Service Center
- Recent Enhancements
- Future Enhancements

# Customer Service Center

# Insourcing Customer Service

## Insourcing all Call Center Activities to Vestwell

- Expected transition in late Q3 2025
- Unified experience for savers who contact the client services team
- Allows for call routing to different teams or solutions based on complexity or the reason for the call
- Enables Vestwell technology, internal systems and additional training to maximize the saver experience

# Recent Enhancements

# Language Translation

## Current & Future State

### Sites and Documents Translated

- Enrollment Flow
- Saver Portal
- Program Disclosure Booklet

### Current Languages

- Spanish
- Mandarin
- Korean
- Russian
- Italian
- Portuguese
- French
- Polish

### Future Languages

- Cantonese
- Arabic
- Yiddish
- Bengali
- Haitian Creole
- Urdu
- Vietnamese
- Tagalog
- Farsi
- Armenian





# Mobile App

With the CalABLE mobile app, you can:



### Access anywhere, anytime

Easily sign in, track expenses,  
and see your savings from  
anywhere.



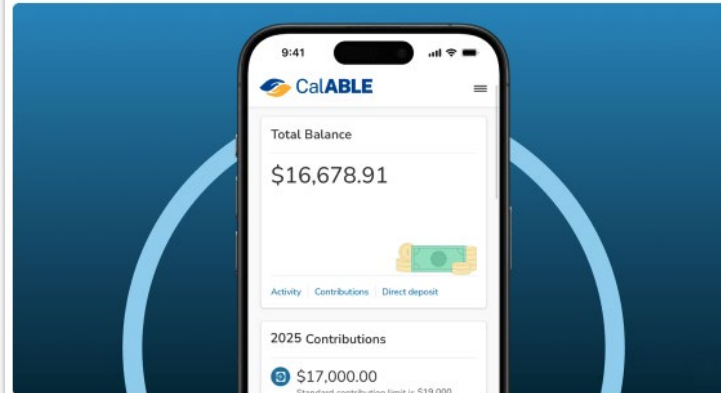
### Save on the move

Make contributions, manage gifts,  
track progress, and select  
investments on the go.



### Pay for what you need

Easily make withdrawals to your  
prepaid CalABLE VISA® Card.



Click here to download the app on iOS or Android:

iOS

Android

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# Future Enhancements

# Upcoming Enhancements

Expanding Capabilities, Growing Savers & Savings, Streamlining Operations

## SMS Notifications

Q2 2025

SMS notifications will allow us to immediately notify account owners via text message when a new bank account has been added or other key account activities take place

## Tiered Access Levels

Q2 2025

Savers will soon have the option of setting additional levels of account access for others to help oversee or manage the accounts

## ABLE Age Adjustment

2025-2026

Vestwell is working with state partners to best promote the disability age of onset moving from 26 to 46 and to adjust the plan to best support the new cohort of savers

# Thank you!