



# **REI NETWORK WEBINAR: FINANCIAL INCLUSION AND SHARED PROSPERITY THE NEXT FRONTIER**

**January 13, 2016  
Washington, DC**

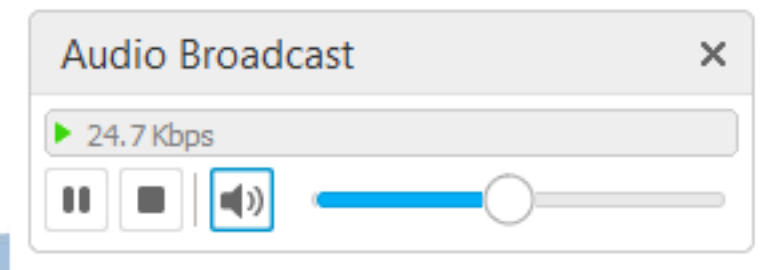
# Moderator



*Michael R. Roush, M.A.*  
**Director, Real Economic  
Impact Network**  
**National Disability Institute**

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# Submitting Questions

**For Q&A:** Please use the chat box or Q&A box to send any questions you have during the webinar to **Michael Roush** or **Nakia Matthews** and we will direct the questions accordingly during the Q&A portion.

- If you are listening by phone and not logged in to the webinar, you may also ask questions by emailing questions to [mroush@ndi-inc.org](mailto:mroush@ndi-inc.org).

***Please note:*** This webinar is being recorded and the materials will be placed on the National Disability Institute website at [www.realeconomicimpact.org](http://www.realeconomicimpact.org)

# Technical Assistance

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# National Disability Institute

The mission of National Disability Institute is to drive social impact to build a better economic future for people with disabilities and their families.







# NDI's Real Economic Impact Network

- An alliance of organizations & individuals dedicated to advancing the economic empowerment of people with disabilities.
- Consists of more than 4,500 members located throughout the United States.
- Includes non-profits, community tax coalitions, asset development organizations, financial education initiatives, corporations & private-sector businesses, federal/state/local governments & agencies, and individuals & families with disabilities.
- All partners join forces to embrace, promote & pursue access to & inclusion of people with disabilities in the economic mainstream.

**Learn more about the REI Network at**

**[www.realeconomicimpact.org/REI-Network.aspx](http://www.realeconomicimpact.org/REI-Network.aspx)**

# Moderator



*Michael Morris, J.D.*  
**Executive Director**  
**National Disability Institute**



# Americans with Disabilities Act of 1990

The Nation's proper goals regarding individuals with disabilities are to assure equality of opportunity, full participation, independent living, and economic self-sufficiency for such individuals;

42 U.S.C. § 1201 (a)(8) (2005)



# NDI: What We Do

- Advance financial inclusion, capability, and well-being
- Leverage the power of collaboration with public and private sector partners

# Adopt and Implement

1. Value all individuals across the spectrum of disabilities as productive contributors to the vitality of a workforce and communities.
2. Support informed decision-making so that people with disabilities have choices with respect to their individual preferences and needs.
3. Encourage collaboration among all stakeholders (public and private sector) to design, implement, and improve opportunities for people with disabilities to participate in the economic mainstream and advance financial capability and well-being.
4. Be accessible, affordable, and inclusive



# Economic Advancement and Financial Inclusion Summit

Ten Recommendations for Collective Action

July 22, 2015  
Newseum  
Washington, DC

<http://www.realeconomicimpact.org/pages/ada-event>

# The Next Ten Years

- Reduce by 50 percent the number of working age adults with disabilities living in poverty
- Increase by 50 percent the number of working age adults with disabilities who are banked and consistently using mainstream affordable and accessible financial services



# **FIVE CORE RECOMMENDATION AREAS**



# 1. Increase competitive integrated employment, income production, and career pathways.

- All 50 states adopt Employment First principles
- Simplify and improve current Social Security work incentives
- Increase participation of youth and adults with disabilities in career pathways through WIOA implementation

## **2. Integrate financial health assessment (FHA) and financial counseling services as part of education, social, and human service delivery systems.**

- Include FHA as part of IDEA, WIOA, Ticket to Work and HCBS individual program plans
- Add financial education and counseling as a fundable service
- Recognize financial capability as a complementary goal to achieve education, employment, and community participation objectives

### **3. Reduce the savings penalties that are a mandatory part of asset limits for public benefits eligibility for SSI, Medicaid, and housing assistance.**

- Exempt from resource testing on any type of retirement account
- Raise asset limits from \$2,000 to \$10,000

## **4. Promote replication of financial inclusion effective strategies by banks and credit unions**

- Conduct a Credit Roundtable
- Create and disseminate a Toolkit of best practices

## **5. Identify and implement solutions to the long term services and supports costs associated with living with a disability over a lifetime.**

- Expand participation in the ABLE Act and remove ceiling for earned income contributions
- Create a long-term care tax credit to offset extra daily costs of support to be more independent

# FINANCIAL INCLUSION AND SHARED PROSPERITY: THE NEW FRONTIER

## NEXT STEPS IN 2016

1. Listening Tour in Cities Across the Country
2. Social Media Campaign
3. Build Collective Action Agenda
  - Disability Community
  - Financial Community
  - Government

# 4 WHEEL CITY PRESENTS

# MAIN\$TREAM

RICK FIRE



TAP WATERZ



# “Mainstream” 4 Wheel City

[Interview: NDI and 4 Wheel City](#)

[Google Play link](#)

[iTunes link](#)

[Amazon link \(with preview\)](#)



# Opportunities 2016

- Partner Spotlight in Monthly Newsletter
- Share Individual Success Stories
- REI Network Advisory Committee
  - Two Advisory Member openings

# Tax Time Tools

- You can access Tax Time tools and resources in the Virtual Toolkit at:

[www.realeconomicimpact.org/taxes-and-tax-preparation/virtual-toolkit](http://www.realeconomicimpact.org/taxes-and-tax-preparation/virtual-toolkit)



# Join the MyFreeTaxes Portal

If you haven't registered this season, sign up now to be a partner by visiting [www.MyFreeTaxes.com](http://www.MyFreeTaxes.com) to promote MyFreeTaxes in your workforce community.

1. Click the "Partner Login" text on the left in the blue box
2. Click "Create an Account"
3. Complete the registration form

Once you register, you will receive an automated verification email. Click the link in the email to activate your account. Log-in on [www.myfreetaxes.com](http://www.myfreetaxes.com).

**QUESTIONS?**



# Join the Movement!

## NDI's Real Economic Impact Network

Sign-up at [bit.ly/NDI-sign-me-up](http://bit.ly/NDI-sign-me-up)

**If you have questions on strategies to build the financial wellness of persons with disabilities, you can send your question to [ask@ndi-inc.org](mailto:ask@ndi-inc.org).**

# AMERICAN DREAM EMPLOYMENT NETWORK (ADEN)



- Authorized national administrative employment network under the Social Security Administration Ticket to Work Program
- Administrative duties performed by NDI Ticket experts, employment services delivered by qualified service providers across the country
- Individuals receiving Social Security disability benefits age 18-64 who want to join the workforce can participate
- ADEN core services: job support and placement, work incentives counseling, financial wellness resources, and long-term employment supports.
- Partnerships with champion employers who strive for diverse workforce and hire individuals with disabilities

*ADEN is a division of National Disability Institute*



[info@americandreamen.org](mailto:info@americandreamen.org)



844.687.2336

# Wrap-Up & Thank You

**Join us for our next webinar:**

Wednesday, February 10, 2016 at 3pm ET

***Tools and Resources to Help Clients Protect Their Identity***

***Presenter: Cindy Liebes, Federal Trade Commission***

*More information about this webinar will be sent out to the REI Network list via email in the coming weeks.*

Check out future webinars and archived webinars (such as today's recording),

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