

# 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

## 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

## Investments

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

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

## 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](http://IAble.gov/enroll) to get started.

