

The Most Wonderful Time of the Year

Preheader: \$5,290 giveaways, financial freedom & more from Treasurer Smith!

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Treasurer's Note

It's a tale as old as time – the days go by slow, but the years go by fast. As I think about wrapping up my first year as Iowa's State Treasurer, I can attest to its truth. This year has been full of moments I won't forget – reuniting an Iowan with \$4.5 million, providing eight families (with two more coming up) a boost to their education savings through College Savings Iowa giveaways, announcing IAble reached \$20 million in assets, meeting many of you at the Iowa State Fair... the list continues.

I cannot wait to see what we accomplish in 2024, and I am thankful to have you along this journey.

With gratitude,

Roby Smith
Iowa State Treasurer

It's Rein-ing Cash

Help these individuals dash, dance and prance into cash this holiday season by telling them they have unclaimed funds waiting at GreatIowaTreasureHunt.gov!



Name	Amount	Name	Amount
Derrick Griswold	\$282.00	Allen McCallister	\$147.00
Arlene Griswold	\$1,080.00	Brandy McCallister	\$159.00
Hazel Griswold	\$119.00	Donald McCallister	\$124.00
Thomas Griswold	\$304.00	Marion & Donald McCallister	\$40,683.00
James Griswold	\$100.00	Charlie Brown	\$300.00
Jon Griswold	\$382.00	Charles Brown	\$155.00
Bartels Rudolph	\$2,425.00	Charles Brown I	\$511.00
Cory & Holly Rudolph	\$239.00	Charles & Doris Brown	\$173.00
David Rudolph	\$400.00	Charles W Brown	\$141.00
Gerzine Rudolph	\$193.00	Ralph E Parker	\$42.00
Margaret Rudolph	\$2,705.00	Cindy Lou Marek	\$175.00
Walker Rudolph	\$115.00	Cynthia Lou Ver Huel	\$375.00

Snow Place Like IAble for Financial Freedom

If you or someone you know is living with a disability and receiving federal benefits, the phrase 'spending down' might be all too familiar. This refers to when recipients of Medicaid, Supplemental

Security Income (SSI) and other government benefits have to bring their assets below the \$2,000 asset cap typically placed on eligibility.

AKA, they have to spend money (sometimes on unnecessary items) in order to maintain crucial benefits.

This is where IAble, Iowa's ABLE plan, comes in. Assets in an IAble account are disregarded from the \$2,000 asset cap, which allows individuals with disabilities to maintain eligibility for government benefits and save their money for important items. Who might be a good fit for IAble? I'm glad you asked! Let's take a look:

- Individuals who want to receive monetary gifts without risking government benefits.
- Parents who want to plan for their child's future disability-related expenses.
- Employees with a disability who want to work without worrying about their savings affecting their benefits.
- Any eligible individual with a disability who wants to save for their own financial goals, with or without help.

Sound like you or someone you know? IAble.gov is a helpful tool for learning more about [saving options](#), [eligibility](#), [qualified expenses](#), [tax benefits](#) and more. Check it out and share with those around you!

Learn more about IAble

[\\$5,290 x 2? Better Brr-leive it!](#)

This holiday season, give a gift that lasts with [College Savings Iowa](#). It has easy-to-understand investments, a wide range of qualified education expenses and tax advantages (just to name a few perks). It's the perfect gift for you to support any child's dream.

But wait, there's more! Visit Iowa529Contest.com before December 31 to enter the children in your life for a chance to win one of TWO \$5,290 College Savings Iowa account contributions.

Enter the giveaway

Happy Holidays!



Don't Miss It!

College Savings Iowa launched a redesigned website that gives future savers the tools they need to get started and gives resources to help current savers navigate their path. With a fresh, new look and easy navigation, I know you'll love the changes as much as I do! But not everything is changing; you'll still be able to find us at CollegeSavingsIowa.com.

Explore the new site