National Disability Institute (NDI) and Neighborhood Allies Live Webinars: Financial Empowerment for Individuals with Disabilities

Achieva Family Trust is proud to partner with National Disability Institute and Neighborhood Allies on a series of educational workshops designed for financial professionals, and other professionals in the disability community who are assisting individuals to work towards the goal of financial empowerment and independence. The webinars are designed to provide information to representatives of financial institutions, financial coaches and counselors, social workers, and case managers regarding best practices for the engagement of individuals with disabilities and the various financial options that are available to address their financial needs. We will kick off the educational series on December 10, 2020, with the following workshop:

Navigation of the Complexities of the Financial Systems as a Person With a Disability

Thursday, December 10, 2020
10 a.m. - 12 p.m.

While we all navigate the same financial system, the approach for a person with a disability may be different due to the barriers and/or additional layers of complexity that might need to be navigated to fully participate in the system. This training is important for financial institutions, disability service providers, and other community partners who want to better understand considerations people with disabilities may have when it comes to making financial decisions. This training will answer:

- What are the challenges and barriers someone with a disability may face as they navigate financial stability and participation in the financial mainstream?
- What does financial empowerment for a person with a disability look like?
- What resources are available in your community to build strong referrals and provide additional services and supports?

Unless the challenges of people with disabilities are intentionally addressed, people with disabilities will be unintentionally excluded from the financial system. By participating in this training, you will better understand new approaches to build expectations for the level of financial well-being that is possible to achieve building a more vibrant and inclusive Pittsburgh community.

Presenters:
Brittany Thome, Manager, Financial Empowerment, National Disability Institute
Katie Metz, Director, Financial Resilience Center, National Disability Institute

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Following the kick-off session on December 10, 2020, the following additional trainings are offered to further build upon this theme:

Disability Awareness and Engagement

Wednesday, January 13, 2021
10 a.m. - 12 p.m.

This workshop will focus on creating greater awareness and sensitivity among financial professionals, regarding engaging with individuals with disabilities. This would include some background and understanding of the financial challenges faced by persons with disabilities, and guidance on disability etiquette and engagement that would assist both the financial professionals and their clients with disabilities toward achieving more successful outcomes from their interactions.

Presenters: Chuck Reese, Vice President, and Branch Manager, Chase Bank;
Anna Frank, Financial Education Program Coordinator, First Commonwealth Bank;
Mara Schwabenbauer, Community Action Specialist, Allegheny County Department of Human Services;
Guy Caruso, Ph.D., FAADD, Western Coordinator, Institute on Disabilities at Temple University;
Katie Smith, Speaker, Educator, Advocate

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Government Benefits 101

Thursday, February 11, 2021
10 a.m. - 12 p.m.

This workshop will provide information regarding the most common types of government benefits received by people with disabilities (i.e. Social Security Disability, Supplemental Security Income (SSI), SNAP benefits, HUD, Section 8 Subsidies.) This session will include a brief overview of how employment income impacts eligibility for public benefits.

Presenters: Elaine Cole, MS, Public Affairs Specialist, Social Security Administration
Erin Guay, MA, Paralegal/Compliance Officer, Pennsylvania Health Law Project
Nancy McMillan, MSW, Employment Benefits Specialist, Achieva Family Trust

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Special Needs Trusts and ABLE Accounts

Tuesday, March 16, 2021
10 a.m. - 12 p.m.

This workshop will include all aspects of PA ABLE Accounts, including account basics, eligibility, qualified expenses, advantages, how to enroll, and options for investments. In addition, a review of the three types of Special Needs Trusts will be provided, as another option for asset protection for persons with disabilities.

Presenters:
Jacquelyn E. Connell, Esq., Achieva Family Trust Staff Attorney
Diana Fishlock, Field Representative, Pennsylvania Treasury Department

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Money Management Resources

Wednesday, April 14, 2021
10 a.m. - 12 p.m.

This workshop will bring together information for financial professionals that includes disability etiquette and best practices for engagement with individuals with disabilities, as well as tools and methods that are available for budgeting, savings, and debt management.

Presenters: Rebecca Johnson, Program Manager, Pittsburgh Financial Empowerment Center
Susan Tachau, Chief Executive Officer, Pennsylvania Assistive Technology Foundation (PATF)
Katherine Reim, Regional Trust Liaison, Achieva Family Trust, Funding Assistance Coordinator, PATF

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The Navigation of the Complexities of the Financial Systems as a Person With a Disability workshop is made available through the generous support of JPMorgan Chase. All other workshops in this series are made available through generous funding from the Heinz and Fisa Foundations.

If you have any questions or need assistance registering, please contact Patty Yerina at 412.995.5000 x589 or futureplanning@achieva.info

Closed Captioning is available