



Enable Savings Plan: Entity Management Dashboard Enrollment



Registration

Landing Page

Entity Management Dashboard Registration

Entities serving as an Authorized Individual can start opening, managing and viewing Accounts once the registration has been submitted and approved by the Plan.

3 EASY STEPS TO BEGIN

- 1 Create the **Control Person's** login credentials
- 2 Enter the Entity's Information
What is an Entity? 
- 3 Review, submit and log in to your Dashboard to complete registration for approval

 Download and notarize the **Entity Certification Form** which will be required to complete the Entity Registration.

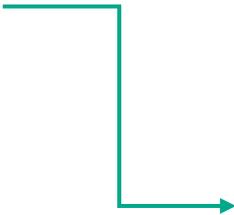
CONTROL PERSON INFORMATION

This email address will be used to log in.

This phone number will be used for login security.

Continue

① Create the **Control Person's** login credentials



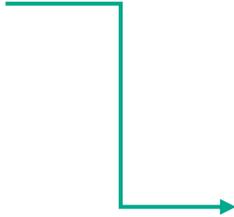
Who is a Control Person? ✕

An individual with significant responsibility to control, manage, or direct the Entity. A Control Person may include, but is not limited to, the: Chief Executive Officer, Chief Financial Officer, Chief Operating Officer, Managing Member, General Partner, President, Vice President, Treasurer, Executive Director/Director of a government agency, or any other individual who regularly performs similar functions. Please see 31 C.F.R. § 1010.230(d)(2). The Control Person must have the authority to make binding commitments on behalf of the Entity.

A Control Person can edit Entity profile settings; add, edit, or remove Team Members; assign an access level to Team Member(s); and open, manage and view Accounts under the Entity's authority.

Close

2 Enter the Entity's Information
What is an Entity? ?



What is an Entity? ×

What is an Entity?

An Entity is a company, organization, either for-profit or non-profit, or government agency that is designated to act as an Authorized Individual for one or more ABLE Eligible Individuals.

What is an Authorized Individual?

The Authorized Individual is the person or Entity either 1) designated to act on the Account Owner's behalf with respect to the Account if the Account Owner lacks Legal Capacity (Legal Capacity is determined by applicable state or district law) to exercise signature authority over the Account, or 2) is the person or Entity designated by an Account Owner with Legal Capacity as the Account Owner's agent under power of attorney to exercise signature authority over the Account.

When can an Entity serve as an Authorized Individual?

The Entity can serve as the Authorized Individual on ABLE Accounts if the Entity is either:

Close

Download and notarize the **Entity Certification Form** which will be required to complete the Entity Registration.

↑ ↑ ↑
Link to state specific form



Plan Documentation ×

Download and notarize the Entity Certification Form.

[Entity Certification Form](#) ↓

When the Entity Certification Form is submitted to the Plan, the notary seal must be fully visible. If the notary seal is not fully visible, the Plan will contact the Control Person and request that a completed form with a fully visible notary seal be mailed to the Plan.

Close

Will not allow you to continue if Passwords don't match

CONTROL PERSON INFORMATION

First Name Wilma	Last Name Flintstone
Work Email Address wilmaflintbc@yahoo.com	Confirm Work Email Address wilmaflintbc@yahoo.com
This email address will be used to log in.	
Direct Phone Number (401) 241-8517	
This phone number will be used for login security.	
Password Entity2024!	Confirm Password Entity2
◆ Passwords don't match	◆ Passwords don't match

Continue

Will not allow you to continue if Password doesn't meet criteria

CONTROL PERSON INFORMATION

First Name
Wilma

Last Name
Flintstone

Work Email Address 
wilmaflintbc@yahoo.com

Confirm Work Email Address 
wilmaflintbc@yahoo.com

This email address will be used to log in.

Direct Phone Number
(401) 241-8517

This phone number will be used for login security.

Password
Entity2 

Confirm Password
Entity2 

- ◆ Password must be a minimum of 8 characters long and include 3 of the following: lower characters, upper characters, special characters, or numbers. Password cannot include first name, last name, username, or email.

CONTROL PERSON INFORMATION

First Name
Wilma

Last Name
Flintstone

Work Email Address 
wilmaflintbc@yahoo.com

Confirm Work Email Address 
wilmaflintbc@yahoo.com

This email address will be used to log in.

Direct Phone Number
(401) 241-8517

This phone number will be used for login security.

Password 
Entity2024!

Confirm Password 
.....

Continue



Tell us about the Entity

ENTITY INFORMATION

Tell us about the Entity

Please enter the Entity's Information.

Name of Entity Test Bedrock	Entity Type For-Profit	
Entity Email Address info@yahoo.org	Entity Phone Number (401) 241-8517	
Entity TIN 666-78-9789	Confirm Entity TIN 666-78-9789	
Entity Permanent Street Address		
Street Address 1 Barney Drive	Street Address Line 2 (optional)	
City Coventry	State Rhode Island	Zip Code 02816

What is an Entity?

What is an Entity?
An Entity is a company, organization, either for-profit or non-profit, or government agency that is designated to act as an Authorized Individual for one or more ABLE Eligible Individuals.

What is an Authorized Individual?
The Authorized Individual is the person or Entity either 1) designated to act on the Account Owner's behalf with respect to the Account if the Account Owner lacks Legal Capacity (Legal Capacity is determined by applicable state or district law) to exercise signature authority over the Account, or 2) is the person or Entity designated by an Account Owner with Legal Capacity as the Account Owner's agent under power of attorney to exercise signature authority over the Account.

When can an Entity serve as an Authorized Individual?
The Entity can serve as the Authorized Individual on ABLE Accounts if the Entity is either:

Close

Entity Type
For-Profit

For-Profit

State or Government

Non-Profit

For-Profit is used as the Entity type throughout this presentation. Some information requested for a For-Profit Entity does not pertain to Non-Profit or State/Government.

- Check this box if the Entity mailing address is different from the permanent address.
If this box is left unchecked, the Entity's permanent address will be used as the mailing address for Account-related information.

How would this mailing address be used?

Entity Mailing Address

Street Address PO Box 1	Street Address Line 2 (optional)	
City Coventry	State Rhode Island	Zip Code 02816

To help the government prevent the funding of terrorism and money laundering activities, federal law requires all financial institutions to obtain, verify and record information that identifies each person or Entity who opens, owns, or manages an Account.

[Back](#)

Cancel

Next

Entity Mailing Address

For Accounts established by the Entity as an Authorized Individual for a minor or for an adult without Legal Capacity, the Entity mailing address will be the Account mailing address. The Entity will receive Account statements, transaction confirmations, and other Account-related correspondence. For Accounts where an Account Owner with Legal Capacity has designated the Entity as an Authorized Individual, the Entity will receive duplicate Account statements and transaction confirmations at the Entity mailing address.

Close

REVIEW & SUBMIT

Does everything look correct?

Review the information to confirm it is complete and accurate.

CONTROL PERSON INFORMATION - [Edit](#)

First Name	Last Name	Work Email Address	Direct Phone Number
Wilma	Flintstone	wilmaflintbc@yahoo.com	401-241-8517

ENTITY INFORMATION - [Edit](#)

Name of Entity	Entity Type	Entity Email Address	Entity Phone Number	Entity TIN	Permanent Address
Test Bedrock	For-Profit	info@yahoo.org	401-241-8517	666-78-9789	1 Barney Drive Coventry, RI 02816

Mailing Address
PO Box 1 Coventry, RI 02816

Box must be checked to submit

I acknowledge the information provided is complete and accurate.

[< Back](#)

[Cancel](#)

[Submit](#)

The Entity Information has been successfully submitted. Additional steps are required to complete the Entity Registration.

Submit Entity Information — Log In and Complete Registration — Plan Review — Approved

To complete the registration please log in, upload the [Entity Certification Form](#), and add Team Members.
Once the additional information is received, the Entity Registration can be submitted for Plan review and approval.

[Log In To Dashboard](#)

[Print This Page](#) 

You can print this page
or save it as a PDF

CONTROL PERSON INFORMATION

First Name	Last Name	Work Email Address	Direct Phone Number
Wilma	Flintstone	wilmaflintbc@yahoo.com	401-241-8517

ENTITY INFORMATION

Name of Entity	Entity Type	Entity Email Address	Entity Phone Number	Entity TIN	Permanent Address
Test Bedrock	For-Profit	info@yahoo.org	401-241-8517	666-78-9789	1 Barney Drive Coventry, RI 02816

Mailing Address

PO Box 1 Coventry, RI 02816



Log In To Dashboard

Log In To Dashboard

Print This Page 

You are now at the main log in page



Log in to the Entity Management Dashboard

Open, manage and view ABLÉ Accounts for Eligible Individuals the Entity serves.

-  Easily open new Accounts and track their progress
-  Manage Accounts on behalf of Eligible Individuals
-  Generate and download Account transaction reports
-  **Need help?** Please call Customer Service at 1-844-ENABLE4 Monday - Friday, 8:00 am - 8:00 pm CT

Not registered? [Start Entity Registration](#)

LOG IN TO THE DASHBOARD



[Forgot Password](#)

Next

[Activate New Team Member Access](#)

Not an Entity? [Go to Individual Account Login](#)

LOG IN TO YOUR DASHBOARD

Let's verify your login information

Select a method to send a temporary PIN

- Text to xxx-xxx-8517
- Voice call to xxx-xxx-8517
- Email to wilmafintbc@yahoo.com

[← Back](#)

Cancel

Next

LOG IN TO THE DASHBOARD

Enter the requested PIN

Enter PIN
111122

[← Back](#)

Cancel

Login



Complete Entity Registration



Submission/next steps e-mail (sent to Entity e-mail address)

From: Enable <ne.noreply@savewithable.com>
Date: Sun, Nov 24, 2024 at 9:31 AM
Subject: Your Entity information has been successfully submitted
To: <Sample@gmail.com>

Thank you for starting the registration for your Enable Entity Management Dashboard. The Entity Information has been successfully submitted and additional steps are required to complete the registration. If you have not already, please log in at the <https://ne.enablesavings.com/services/login> to upload the Entity Certification Form, add Team Members, and submit for Plan review. Certain information is necessary to create Team Members within the Entity Management Dashboard. To complete this process more easily, please have available the name, job title, work email address, and direct phone number for all Team Members. For the roles of Control Person(s) and Beneficial Owner(s) you will also require their residential address, date of birth and Social Security Number.

✓ COMPLETE REGISTRATION

🌐 FAQs

Need help?

☎ Please call Customer Service at
(888) 609-3263 Monday-Friday 8:00
am to 5:00 pm ET

[Download Plan Forms](#) 

Complete Entity Registration

 Please ensure you complete all registration steps and submit. **Progress will be lost if you log out or leave.**

STEP 1

Submit Entity Information

✓ Complete

STEP 2

Upload Notarized Entity Certification Form and Add Team Members

Get Started

Please upload a notarized [Entity Certification Form](#) and add all [Team Members](#) for the Entity.

STEP 3

Submit for Plan Review

○ Not Completed

Avoid losing progress and submit the registration for Plan review.

Allow up to 7 business days once the registration is submitted for the Plan verification.

[Plan Disclosure Booklet](#)

[Privacy Policy](#)

[Security Policy](#)

[National ABLE Alliance](#)

[Contact Us](#)

Add Team Members

and add all **Team Members** for the Entity.

Team Member Management

Allows a Team Member to open, manage and view ABL Accounts under the Entity's authority, as well as the ability to add, remove and edit Authorized Representatives of the Entity. Team Members with Team Member Management access level must have the authority to act on behalf of the Entity and to bind the Entity with respect to any ABL Account opened or maintained by the Entity.

- ✓ View ABL Accounts and run transactional reports
- ✓ Open and manage ABL Accounts
- ✓ Add, remove or edit Authorized Representative Team Member(s)

Signatory

Allows a Team Member to open, manage and view ABL Accounts under the Entity's authority. Team Members with Signatory access level must have the authority to act on behalf of the Entity and to bind the Entity with respect to any ABL Account opened or maintained by the Entity.

- ✓ View ABL Accounts and run transactional reports
- ✓ Open and manage ABL Accounts
- ✗ Add, remove or edit Authorized Representative Team Member(s)

Read-Only

Allows a Team Member to view ABL Accounts and run transaction history reports for ABL Accounts under the Entity's authority. Read-Only access level does not include access to ABL Account-level detailed information.

- ✓ View ABL Accounts and run transactional reports
- ✗ Open and manage ABL Accounts
- ✗ Add, remove or edit Authorized Representative Team Member(s)

At bottom of pop up for 'Team Members' it pulls out key points of different Access Levels.

Team Member

A member of an Entity group made up of the Control Person(s), Beneficial Owner(s), and Authorized Representative(s) of the Entity.

Control Person

An individual with significant responsibility to control, manage, or direct the Entity. A Control Person may include, but is not limited to, the: Chief Executive Officer, Chief Financial Officer, Chief Operating Officer, Managing Member, General Partner, President, Vice President, Treasurer, Executive Director/Director of a government agency, or any other individual who regularly performs similar functions. Please see 31 C.F.R. § 1010.230(d)(2). The Control Person must have the authority to make binding commitments on behalf of the Entity.

A Control Person can edit Entity profile settings; add, edit, or remove Team Members; assign an access level to Team Member(s); and open, manage and view Accounts under the Entity's authority.

Beneficial Owner → Only For-profit Entities have a Beneficial Owner.

Any individual who directly or indirectly, through any contract, arrangement, understanding, relationship, or otherwise, owns 25% or more of the equity interests of the legal Entity. Please see 31 C.F.R. § 1010.230(d)(1). The Beneficial Owner can be assigned either Team Member Management, Signatory, or Read-Only access level.

Authorized Representative

An individual assigned Team Member Management, Signatory or Read-Only access level.

Access Levels

Team Member Management

Allows a Team Member to open, manage and view ABL Accounts under the Entity's authority, as well as the ability to add, remove and edit Authorized Representatives of the Entity. Team Members with Team Member Management access level must have the authority to act on behalf of the Entity and to bind the Entity with respect to any ABL Account opened or maintained by the Entity.

Signatory

Allows a Team Member to open, manage and view ABL Accounts under the Entity's authority. Team Members with Signatory access level must have the authority to act on behalf of the Entity and to bind the Entity with respect to any ABL Account opened or maintained by the Entity.

Read-Only

Allows a Team Member to view ABL Accounts and run transaction history reports for ABL Accounts under the Entity's authority. Read-Only access level does not include access to ABL Account-level detailed information.

STEP 2

Upload Notarized Entity Certification Form and Add Team Members

Get Started

Please upload a notarized [Entity Certification Form](#) and add all [Team Members](#) for the Entity.

Step 1 of 2

Upload Entity Certification Form

[Download Entity Certification Form](#) ↓

Please upload a notarized Entity Certification Form to continue

Drag and drop files here to upload

Please ensure your document is 2MB or less and one of the following file types: JPG, PDF, TIFF, PNG, or BMP.

Select files... Drop files here to select

Drag and drop or select a saved file.

⚠ When the Entity Certification Form is submitted to the Plan, the notary seal must be fully visible. If the notary seal is not fully visible, the Plan will contact the Control Person and request that a completed form with a fully visible notary seal be mailed to the Plan.

Cancel

Next

STEP 2

Upload Notarized Entity Certification Form and Add Team Members

Get Started

Please upload a notarized [Entity Certification Form](#) and add all [Team Members](#) for the Entity.

Step 1 of 2

Upload Entity Certification Form

[Download Entity Certification Form](#) ↓

Please upload a notarized Entity Certification Form to continue



Drag and drop files here to upload

Please ensure your document is 2MB or less and one of the following file types: JPG, PDF, TIFF, PNG, or BMP.

Select files...

Drop files here to select

 _ILB30283924 (2).pdf
231.75 KB



File shows here when successfully uploaded →

Step 2 of 2

Add Team Members

[See Team Members](#)

Complete the profiles for the **Control Person**, any **Beneficial Owner(s)** who own 25% or more of the equity interest (if none, at least one Beneficial Owner is required) and **Authorized Representative(s)**. Assign at least one Beneficial Owner or Authorized Representative **Team Member Management** or **Signatory** access level.

Pop-up text shown
on next page →

Complete your Control Person profile ^

Control Person Name
Test Indiana

Job Title CEO	Date of Birth 01/12/1978 	
Social Security Number 	Confirm Social Security Number 	
Residential Street Address 22 Fred Drive	Residential Street Address Line 2	
City Coventry	State Rhode Island 	Zip Code 02816

Only For-Profit flow requires Beneficial Owner Information

Control Person Name
Test Indiana

Job Title
CEO

Date of Birth
01/12/1978

Social Security Number

Confirm Social Security Number

Residential Street Address
22 Fred Drive

Residential Street Address Line 2

City
Coventry

State
Rhode Island

Zip Code
02816

Confirm that the information entered above is true and accurate.

Yes No

Are there **Beneficial Owners** who own 25% or more of equity interest within the organization?

Yes No

Additional
questions:
For-profit
Entities only

Assign a Beneficial Owner who owns 25% or more of equity interests

First Name

Last Name

Work Email Address 

Direct Phone Number

This email address will be used for the Team Member to log in.

This phone number will be used for login security.

Job Title

Date of Birth
MM/DD/YYYY 

Social Security Number 

Confirm Social Security Number 

Residential Street Address

Residential Street Address Line 2

City

State 

Zip Code

What **access level** would you like this Team Member to have?

Team Member Management Signatory Read-Only

- Not all For-profit Entities will have a Beneficial Owner other than the Control Person.
- The Control Person is a Beneficial Owner.
- We do require the PII for a Beneficial Owner. To have access to the dashboard, it needs to be inputted at time of Registration.
- For all other Entity types, we only require PII for Control Person (*Government Entities can get this waived*)

Step 2 of 2

Add Team Members

[See Team Members](#)

Complete the profiles for the **Control Person**, any **Beneficial Owner(s)** who own 25% or more of the equity interest (if none, at least one Beneficial Owner is required) and **Authorized Representative(s)**. Assign at least one Beneficial Owner or Authorized Representative **Team Member Management** or **Signatory** access level.

Team Member Roles

Team Member

A member of an Entity group made up of the Control Person(s), Beneficial Owner(s), and Authorized Representative(s) of the Entity.

Control Person

An individual with significant responsibility to control, manage, or direct the Entity. A Control Person may include, but is not limited to, the: Chief Executive Officer, Chief Financial Officer, Chief Operating Officer, Managing Member, General Partner, President, Vice President, Treasurer, Executive Director/Director of a government agency, or any other individual who regularly performs similar functions. Please see 31 C.F.R. § 1010.230(d)(2). The Control Person must have the authority to make binding commitments on behalf of the Entity.

A Control Person can edit Entity profile settings; add, edit, or remove Team Members; assign an access level to Team Member(s); and open, manage and view Accounts under the Entity's authority.

Beneficial Owner

Any individual who directly or indirectly, through any contract, arrangement, understanding, relationship, or otherwise, owns 25% or more of the equity interests of the legal Entity. Please see 31 C.F.R. § 1010.230(d)(1). The Beneficial Owner can be assigned either Team Member Management, Signatory, or Read-Only access level.

Authorized Representative

An individual assigned Team Member Management, Signatory or Read-Only access level.

Who is a Control Person?

An individual with significant responsibility to control, manage, or direct the Entity. A Control Person may include, but is not limited to, the: Chief Executive Officer, Chief Financial Officer, Chief Operating Officer, Managing Member, General Partner, President, Vice President, Treasurer, Executive Director/Director of a government agency, or any other individual who regularly performs similar functions. Please see 31 C.F.R. § 1010.230(d)(2). The Control Person must have the authority to make binding commitments on behalf of the Entity.

A Control Person can edit Entity profile settings; add, edit, or remove Team Members; assign an access level to Team Member(s); and open, manage and view Accounts under the Entity's authority.

Close

Who is a Beneficial Owner?

Any individual who directly or indirectly, through any contract, arrangement, understanding, relationship, or otherwise, owns 25% or more of the equity interests of the legal Entity. Please see 31 C.F.R. § 1010.230(d)(1). The Beneficial Owner can be assigned either Team Member Management, Signatory, or Read-Only access level.

Close

Who is an Authorized Representative?

An individual assigned Team Member Management, Signatory or Read-Only access level.

Close

What does the Team Member Management access level allow a Team Member to do?

Allows a Team Member to open, manage and view ABL Accounts under the Entity's authority, as well as the ability to add, remove and edit Authorized Representatives of the Entity. Team Members with Team Member Management access level must have the authority to act on behalf of the Entity and to bind the Entity with respect to any ABL Account opened or maintained by the Entity.

Close

What does the Signatory access level allow a Team Member to do?

Allows a Team Member to open, manage and view ABL Accounts under the Entity's authority. Team Members with Signatory access level must have the authority to act on behalf of the Entity and to bind the Entity with respect to any ABL Account opened or maintained by the Entity.

Close

✓ Add Team Member

First Name: Betty

Last Name: Rubble

Work Email Address: bettyrubblbc@yahoo.com

Direct Phone Number: (401) 241-8517

Job Title: Manager

This email address will be used for the Team Member to log in.

This phone number will be used for login security.

What **access level** would you like this Team Member to have?

Team Member Management

Signatory

Read-Only

No PII required for additional Team Members

Add Team Member +

To help the government prevent the funding of terrorism and money laundering activities, federal law requires all financial institutions to obtain, verify and record information that identifies each person or Entity who opens, owns, or manages an Account.

⚠ You must add at least one Team Member with a Team Member Management or Signatory access level to proceed.

This email address will be used for the Team This phone number will be used for login

Have you added all Team Members? ×

Have you added all Beneficial Owners and Authorized Representatives with Team Member Management and Signatory access level?

[Continue Adding](#) [I'm Finished](#)

inst

information that identifies each person or Entity who opens, owns, or manages an Account.

Review and submit

Does everything look correct?

Review the information to confirm it is complete and accurate before certifying.

CONTROL PERSON - [Edit](#)

First Name	Last Name	Work Email Address	Direct Phone Number	Job Title	Date of Birth	SSN	Residential Street Address
Wilma	Flintstone	wilmaflintbc@yahoo.com	401-241-8517	CEO	01/12/1978	*****2432	22 Fred Drive Coventry, RI 02816

Access Level

Admin

BENEFICIAL OWNERS - [Edit](#)

First Name	Last Name	Work Email Address	Direct Phone Number	Job Title	Date of Birth	SSN	Residential Street Address
Wilma	Flintstone	wilmaflintbc@yahoo.com	401-241-8517	CEO	01/12/1978	*****2432	22 Fred Drive Coventry, RI 02816

Access Level

Admin

AUTHORIZED REPRESENTATIVES - [Edit](#)

First Name	Last Name	Work Email Address	Direct Phone Number	Job Title	Access Level
Betty	Rubble	bettyrubblbc@yahoo.com	401-241-8517	Manager	Signatory

The Control Person must scroll to the bottom of the Certifications before being able to check the box to consent.

The box must be checked, consenting and agreeing to the Certifications, before Registration can be submitted.

CONTROL PERSON CERTIFICATIONS

Please scroll to the bottom of the box to view the certifications and continue.

I understand that by selecting the checkbox below I am certifying that I am a Control Person of the Entity named in this Entity Registration, and I am duly authorized to act on the Entity's behalf. As such, I certify the truth and accuracy of the following:

1. I have the authority to complete this Entity Registration on behalf of the Entity and have the authority to bind the Entity.
2. I have familiarity with the business and affairs of the Entity so as to be able to knowingly make the statements set forth in this Entity Registration.
3. The Entity is in good standing in its jurisdiction of formation and any other required jurisdictions.
4. I understand that NH ABLE will, in part, rely on the statements and certifications set forth in this Entity Registration in determining whether the Entity will be permitted to open NH ABLE Accounts on behalf of Eligible Individuals.
5. I have the authority to act on behalf of the Entity and to delegate Team Members to further act on behalf of the Entity and to bind the Entity with respect to any NH ABLE Account established or maintained by the Entity for an Eligible Individual.

- By checking this box, I consent and agree: (i) to the use of e-signature; (ii) that I am duly authorized to complete this Entity Registration; (iii) that I know and understand the contents of the Entity Registration; (iv) that the information provided as part of this Entity Registration is true and correct; and (v) each certification in the box above is true and accurate. I acknowledge and agree to the terms and conditions set forth in the [Plan Disclosure Booklet] and the Privacy Policy.
See the [Plan Disclosure Booklet](#) and [Privacy Policy](#).

By continuing you are confirming that the information provided is complete and accurate to the best of your knowledge. Entity Registrations are under review until approved by the Plan. A notification will be sent to the organizational email address once the registration has been approved.

[< Back](#)

[Cancel](#)

[Submit](#)

CONTROL PERSON CERTIFICATIONS

Please scroll to the bottom of the box to view the certifications and continue.

I understand that by selecting the checkbox below I am certifying that I am a Control Person of the Entity named in this Entity Registration, and I am duly authorized to act on the Entity's behalf. As such, I certify the truth and accuracy of the following:

1. I have the authority to complete this Entity Registration on behalf of the Entity and have the authority to bind the Entity.
2. I have familiarity with the business and affairs of the Entity so as to be able to knowingly make the statements set forth in this Entity Registration.
3. The Entity is in good standing in its jurisdiction of formation and any other required jurisdictions.
4. I understand that NH ABLER will, in part, rely on the statements and certifications set forth in this Entity Registration in determining whether the Entity will be permitted to open NH ABLER Accounts on behalf of Eligible Individuals.
5. I have the authority to act on behalf of the Entity and to delegate Team Members to further act on behalf of the Entity and to bind the Entity with respect to any NH ABLER Account established or maintained by the Entity for an Eligible Individual.

- By checking this box, I consent and agree: (i) to the use of e-signature; (ii) that I am duly authorized to complete this Entity Registration; (iii) that I know and understand the contents of the Entity Registration; (iv) that the information provided as part of this Entity Registration is true and correct; and (v) each certification in the box above is true and accurate. I acknowledge and agree to the terms and conditions set forth in the [Plan Disclosure Booklet] and the Privacy Policy.

See the [Plan Disclosure Booklet](#) and [Privacy Policy](#).

By continuing you are confirming that the information provided is complete and accurate to the best of your knowledge. Entity Registrations are under review until approved by the Plan. A notification will be sent to the organizational email address once the registration has been approved.

[< Back](#)

 **Please read and accept the Terms and Conditions before proceeding.**

CONTROL PERSON CERTIFICATIONS

Please scroll to the bottom of the box to view the certifications and continue.

1. [Plan Disclosure Booklet](#)
2. [Plan Privacy Policy](#)

To download, view, and print the disclosure documents online, you'll need Adobe Reader. If you don't have Adobe Reader, go to www.adobe.com to download it for free.

If you do not select the checkbox below or if you're unable to download, print, or otherwise receive the disclosure documents, or if you do not consent to e-signature and electronic delivery of the disclosure documents noted above, it is not possible to submit your Entity Registration. Contact the Plan for assistance.

The Plan does not charge a fee to use our website, but you may incur expenses from your Internet service provider when you access information online. Also, be aware that your Internet service provider may occasionally experience system failure, and hyperlinks to documents may not function properly.

- By checking this box, I consent and agree: (i) to the use of e-signature; (ii) that I am duly authorized to complete this Entity Registration; (iii) that I know and understand the contents of the Entity Registration; (iv) that the information provided as part of this Entity Registration is true and correct; and (v) each certification in the box above is true and accurate. I acknowledge and agree to the terms and conditions set forth in the [Plan Disclosure Booklet] and the Privacy Policy.
See the [Plan Disclosure Booklet](#) and [Privacy Policy](#).

By continuing you are confirming that the information provided is complete and accurate to the best of your knowledge. Entity Registrations are under review until approved by the Plan. A notification will be sent to the organizational email address once the registration has been approved.

[< Back](#)

Cancel

Submit

You've submitted the Entity registration for Plan review!

✔ Submit Entity Information — ✔ Log In and Complete Registration — ⏸ Plan Review — ○ Approved

Thank you for submitting the Entity Registration. An email confirmation will be sent to the Entity organizational email address. Please allow up to 7 business days for Plan verification. An email will be sent to the Entity organizational email address when the Entity Registration has been approved. If additional information is required, the Plan will contact the Control Person.

[Back to Dashboard](#)

[Print This Page](#) 

CONTROL PERSON

First Name	Last Name	Work Email Address	Direct Phone Number	Job Title	Date of Birth	SSN
Wilma	Flintstone	wilmaflintbc@yahoo.com	401-241-8517	CEO	01/11/1978	*****2432
Residential Street Address		Access Level				
22 Fred Drive Coventry, RI 02816		Admin				

BENEFICIAL OWNERS

First Name	Last Name	Work Email Address	Direct Phone Number	Job Title	Date of Birth	SSN
Wilma	Flintstone	wilmaflintbc@yahoo.com	401-241-8517	CEO	01/11/1978	*****2432
Residential Street Address		Access Level				
22 Fred Drive Coventry, RI 02816		Admin				

AUTHORIZED REPRESENTATIVES

First Name	Last Name	Work Email Address	Direct Phone Number	Job Title	Access Level
Betty	Rubble	bettyrubblbc@yahoo.com	401-241-8517	Manager	Signatory

Once submitted, the Control Person can no longer view SSN for Beneficial Owner

Team Member(s) successfully added.

Entity Registration Submitted

You've submitted the Entity Registration for Plan review.
Please allow up to 7 business days once the registration is submitted.

The Plan is reviewing your Registration application

Allow up to 7 business days once the registration is submitted.

 In Review

UP NEXT

Add and manage ABLE Accounts

Team Members will be able to start adding Accounts after approval.

Registration in review e-mail

From: Enable <ne.noreply@savewithable.com>
Date: November 24, 2024 at 9:43:38 AM EST
To: <Sample@gmail.com>
Subject: Your Entity registration is being reviewed

Thank you for completing your Enable Entity Management Dashboard registration. Please allow up to 7 business days for Plan verification. You will receive another email when the registration is approved. If additional information is required the Plan will contact you.

Thank you for choosing Enable.



Approved Dashboard – Control Person View

Approval e-mail

From: Enable <ne.noreply@savewithable.com>
Date: November 24, 2024 at 9:46:08 AM EST
To: <Sample@gmail.com>
Subject: Welcome to the Entity Management Dashboard

Your Entity Registration has successfully gone through Plan review and been approved. You can now log in at <https://ne.enablesavings.com/services/login> to open and manage Enable Accounts.

Thank you for choosing Enable.



Log in to the Entity Management Dashboard

Open, manage and view ABL Accounts for Eligible Individuals the Entity serves.

- ✔ Easily open new Accounts and track their progress
- ✔ Manage Accounts on behalf of Eligible Individuals
- ✔ Generate and download Account transaction reports
- 📞 **Need help?** Please call Customer Service at 1-844-ENABLE4 Monday - Friday, 8:00 am - 8:00 pm CT

Not registered? [Start Entity Registration](#)

LOG IN TO THE DASHBOARD



[Forgot Password](#)

Next

[Activate New Team Member Access](#)

Not an Entity? [Go to Individual Account Login](#)

Control Person View

-  ACCOUNT MANAGEMENT
-  TEAM MEMBERS
-  FAQs
-  PROFILE SETTINGS

Need help?
Please call Customer Service at
(888) 609-3263 Monday-Friday 8:00
am to 5:00 pm ET

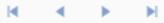
[Download Plan Forms](#) 

Entity Management Dashboard

[Open New Account](#) 

 [Export Account List](#)

NAME ↑	ACCOUNT NUMBER	SSN	STATUS	▼	BALANCE
No records available.					
					0 - 0 of 0 items

Control Person View

ACCOUNT MANAGEMENT

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Team Members

[Add Team Member](#)

[See Team Members and Access Levels](#)

NAME	EMAIL	ROLE	ACCESS LEVEL
Betty Rubble	bettyrubblbc@yahoo.com	Authorized Representative	Signatory
Wilma Flintstone	wilmaflintbc@yahoo.com	Control Person Beneficial Owner	Admin

Allows for Adjust Access Level or Remove Team Member

 ACCOUNT MANAGEMENT

 TEAM MEMBERS

 **FAQS**

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Frequently Asked Questions

How does an Entity open a new Account for an Eligible Individual? 

How can Team Members use the Entity Management Dashboard? 

How do I change or update Entity and Team Member information within the dashboard? 

What is the meaning of each Account status type in the Entity Management Dashboard? 

What happens if the Account Owner for whom the Entity manages the ABLE Account moves to different group home or is no longer served by the Entity? 

Frequently Asked Questions

How does an Entity open a new Account for an Eligible Individual?

A Team Member who has Team Member Management or Signatory access level can use the Entity Management Dashboard to open a new Account (via the "Add a New Account" button). Once a Team Member selects "Add a New Account," they will complete and submit an enrollment for a new Account. The following Account Owner information is needed to open the Account:

- Permanent street address
- Mailing address (if different)
- Date of Birth
- Social Security Number
- Driver's license, state-issued I.D., military I.D. or passport number
- Investment Option choices
- Bank account number and routing number (if funding and/or withdrawing via electronic bank transfer)
- Documentation, if required by the Plan

Once the enrollment is submitted, the new Account will be in pending status until approved by the Plan. While in pending status the Account is unable to receive contributions. Any contributions received will be held until the Account is no longer in pending status.

How can Team Members use the Entity Management Dashboard?

All Accounts for which the Entity serves as Authorized Individual are displayed in the Account Management section of the Entity Management Dashboard. From the Dashboard, Team Members with Team Member Management or Signatory access level can open, manage, and transact on Accounts on behalf of the Entity. Team Members with Read-Only access level can view Account information within the Dashboard and run transaction history reports.

How do I change or update Entity and Team Member information within the dashboard?

Changing Entity Information after the Entity is registered:

A Control Person of the Entity can update the Entity mailing and permanent addresses, organizational email address, and phone number in the Profile Settings section of the Entity Management Dashboard.

Please contact Customer Service if the Entity name or TIN needs to be changed.

Password updates:

Any Team Member can change their password by clicking on the Forgot Password link via the Entity Management Dashboard login page.

Changing a Team Member's Information under Profile Settings:

In order to change or update any Team Member information under Profile Settings (name, email address, job title, or phone number), a Control Person of the Entity, or a Team Member with Team Member Management access level, must remove the Team Member, then add them back as a new Team Member with the updated information. However, the same email address and password may be used.

Team Members with Team Member Management access level have the authority to add or remove others with Team Member Management access level. Team Members with Team Member Management access level must have the authority to act on behalf of the Entity and to bind the Entity with respect to any ABLE Account opened or maintained by the Entity.

Only a Control Person may add or remove another Control Person or Beneficial Owner.

Note: There must be at least two Team Members who have Team Member Management or Signatory access level at all times. In some instances, a Team Member may have to be added before one can be removed.

Changing a Team Member's access level:

A Control Person or Team Member with Team Member Management access level can change the access level for Team Members by going under Team Members and selecting the vertical ellipsis to the right of the Team Member.

Only a Control Person may change the access level for a Beneficial Owner.

Adding or removing a Control Person:

If a Control Person is changed or added, an updated Entity Certification Form must be submitted to the Plan. New Control Persons or Beneficial Owners will be in pending status until they have been reviewed and approved by the Plan.

What is the meaning of each Account status type in the Entity Management Dashboard?

- Active – the Account is open and in good order.
- Closed – the Account has been permanently closed.
- Account Freeze – The Plan has placed a freeze on the Account. If you have questions, please contact Customer Service at 1-844-ENABLE4 Monday–Friday 8:00 am to 8:00 pm CT for assistance. Accounts may be unable to receive contributions or allow withdrawals while in Account Freeze.
- Action Needed – the Plan was unable to verify the information provided in the enrollment. Please contact Customer Service at 1-844-ENABLE4 Monday–Friday 8:00 am to 8:00 pm CT
- Pending Review – the Account is in a pending status until it has been reviewed by the Plan.

What happens if the Account Owner for whom the Entity manages the ABLE Account moves to different group home or is no longer served by the Entity?

Please immediately contact the Plan for instructions on how to remove the Entity as Authorized Individual and for next steps for transferring management of the Account. Please contact Customer Service at 1-844-ENABLE4 Monday–Friday 8:00 am to 8:00 pm CT

Profile Settings

- TEAM MEMBERS
- FAQS
- PROFILE SETTINGS**

Entity Profile Settings [Edit](#)

Name of Entity	Entity Type	Entity Email Address	Entity Phone Number	Entity TIN
Test Bedrock	For-Profit	wilmaflintbc@yahoo.com	401-241-8517	666-78-9789

Permanent Address	Mailing Address
1 Barney Drive Coventry, RI 02816	PO Box 1 Coventry, RI 02816

E-Delivery Notifications [Edit](#)

Confirmations, statements, and reminders for Individual ABLE Accounts managed by the Entity.

E-Delivery Email Address
wilmaflintbc@yahoo.com



User Profile Settings

Editing capabilities for users are currently not available. The Team Member must be removed and re-added to make changes.

First Name	Last Name	Work Email Address	Direct Phone number
Wilma	Flintstone	wilmaflintbc@yahoo.com	401-241-8517

Editing capabilities for users are currently not available. The Team Member must be removed and re-added to make changes.



Approved Dashboard – Team Member View

Team Member e-mail

From: Enable <ne.clientservice@savewithable.com>
Sent: Sunday, November 24, 2024 8:51 AM
To: <Sample@gmail.com>
Subject: Please join the Entity Management Dashboard

You've been invited to be a Team Member in the Test Bedrock Entity NH ABLE Entity Management Dashboard. Visit <https://ne.enablesavings.com/services/login> and select Activate New Team Member Access to set up your login credentials. Once registered, please bookmark the site so that you can log in more easily in the future.



Log in to the Entity Management Dashboard

Open, manage and view ABL Accounts for Eligible Individuals the Entity serves.

- ✓ Easily open new Accounts and track their progress
- ✓ Manage Accounts on behalf of Eligible Individuals
- ✓ Generate and download Account transaction reports
- 📞 **Need help?** Please call Customer Service at 1-844-ENABLE4 Monday - Friday, 8:00 am - 8:00 pm CT

Not registered? [Start Entity Registration](#)

LOG IN TO THE DASHBOARD

Username

Password 

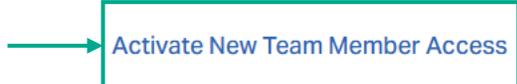
[Forgot Password](#)

Next

[Activate New Team Member Access](#)

Not an Entity? [Go to Individual Account Login](#)

For Team Member login after Entity is approved



ACTIVATE NEW USER ACCOUNT

Let's verify your login information

Please enter your email address

Username
bettyrubblbc@yahoo.com

Cancel

Next

ACTIVATE NEW TEAM MEMBER ACCESS

Let's verify your login information

Select a method to send a temporary PIN

- Text to xxx-xxx-8517
- Voice call to xxx-xxx-8517
- Email to wilmaflintbc@yahoo.com

Cancel

Next

LOG IN TO THE DASHBOARD

Enter the requested PIN

[< Back](#)

Cancel

Login

ACTIVATE NEW TEAM MEMBER ACCESS

Choose a new password

Please enter your new password.

[< Back](#)

Cancel

Submit

 Password updated successfully

LOG IN TO YOUR DASHBOARD

Username
bettyrubblbc@yahoo.com

Password
●●●●●●●● 

[Forgot Password](#)

Next

Team Member Log in – no editing capabilities for Signatory or Read Only Access

 ACCOUNT MANAGEMENT

 **TEAM MEMBERS**

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Team Members [See Team Members and Access Levels](#)

NAME	EMAIL	ROLE	ACCESS LEVEL
Betty Rubble	bettyrubblbc@yahoo.com	Authorized Representative	Signatory
Wilma Flintstone	wilmaflintbc@yahoo.com	Control Person Beneficial Owner	Admin

 ACCOUNT MANAGEMENT

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 **PROFILE SETTINGS**

Profile Settings

User Profile Settings

Editing capabilities for users are currently not available. The Team Member must be removed and re-added to make changes.

First Name	Last Name	Work Email Address	Direct Phone number
Betty	Rubble	bettyrubblbc@yahoo.com	401-241-8517