Account:_____

Account Owner:_____

Mississippi ABLE

Achieving a Better Life Experience

Administered by the Mississippi Department of Rehabilitation Services

ABLE ACCOUNT LEDGER

DATE	DEPOSIT	WITHDRAWAL	ACCOUNT BALANCE	DEPOSIT TOTAL FOR THE YEAR	WHY THIS IS A QUALIFIED EXPENSE

HOW TO EVALUATE A POTENTIAL QUALIFIED DISABILITY EXPENSE PER IRS GUIDELINES*

1. The expense was incurred while you were an eligible individual.
2. The expense only benefits you as an individual with a disability.
3. The expense helps you maintain or improve your health, independence, or quality of life.
4. The expense relates to your disability. The following are ways the expense may be related:

- Education
- Housing
- Transportation
- Employment Training and Support
- Assistive Technology
- Personal Support Services
- Preventative Health & Wellness
- Financial Management & Administrative Services
- Legal Fees
- Expenses for Oversight and Monitoring
- Funeral and Burial Expenses

*Any question you have on a qualified disability expense should be addressed to the financial institution where you established your ABLE Account and the Internal Revenue Service before incurring the expense.