



**CONSORTIUM FOR CITIZENS  
WITH DISABILITIES**

**Ad Hoc Asset Development, Tax, and Finance Task Force  
December 2007**

Mission

The CCD Asset Development and Tax and Finance Task Force works on public policy issues that promote full access to the formal economy for persons with disabilities, their families and employers.

Task Force Actions Taken This Year

- Formation of Ad Hoc Committee led by APHSA's Center for Workers and Disability
- Series of informational meetings provided to Ad Hoc members about the current state of asset development programs and initiatives for persons with disabilities by the CFED, National Disability Institute and IRS Stakeholder Partnerships Education and Communication (SPEC)
- Attended briefings from Senator Dodd's staff on the "Disability Savings Account Legislation"
- Joint meeting with U.S Treasury Office on Financial Education to explore opportunities and share information
- Held informal briefing on Representative Crenshaw's "Financial Security Accounts for Individuals with Disabilities" Bill and Representative's Conyer's "Freedom To Save Act of 2007" Bill
- Members attended meeting hosted by the New America Foundation to hear comment about Representative Conyer's Bill "Freedom to Save Act of 2007." Steven Mendelsohn, attorney with The Law, Health Policy & Disability Center, University of Iowa, presented as part of the panel.
- Presentation and dialogue about Shared Horizons, Inc. a pooled Trust and Fiduciary Services for People with Disabilities in DC and Maryland.

Task Force 2008 Agenda:

In the area of financial and tax education, the task force plans to explore/address:

- Integrate financial education on IEPs, K – 12
- Asset Building
- Predatory lending

On the legislative front, the task force plans to address asset related provisions in legislation such as:

- The Conyers, Crenshaw, and Dodd proposals referenced in 2007
- Farm Bill reauthorization proposals
- Housing – Section 8
- Access to health care platforms

The task force also intends to initiate and foster relationships with:

- Senate Finance, Agriculture, and HELP Committees
- House Ways & Means, Energy & Commerce, and Education & Labor Committees
- Internal Revenue Service, Department of the Treasury

Finally, the task force intends to engage private sector partners in educating and providing services to people with disabilities, such as business associations, professional groups, and leveraging the Community Reinvestment Act in the banking community.

Task Force Co-Chairs include:

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