

# HOW TO CONTRIBUTE TO A CALABLE ACCOUNT WITH E-GIFTING

## Create an eGifting Event

The screenshot displays the CalABLE website interface. At the top left is the CalABLE logo, featuring a stylized blue and orange hand holding a heart. In the top right corner, there is a [Contact Us](#) link. A blue navigation bar contains the following menu items: Home, Your Account (with a dropdown arrow), eGift (with a dropdown arrow), Financials (with a dropdown arrow), Documents (with a dropdown arrow), Profile (with a dropdown arrow), and Log Out. The eGift dropdown menu is open, showing options: Create an Event, View Events, Address Book, and Contributions Report. On the left side, under the heading "YOUR ACCOUNTS", there are two account entries: JOHN SMITH and JANE SMITH. Below these entries, a message states: "Click on any name listed below to take action on that account." There are two buttons: "Incomplete Applications" and "No Incomplete Applications". The main content area for JOHN SMITH shows fields for Permanent Address, Mailing Address, Primary Phone, Secondary Phone (NOT ON FILE), and Email. An "Update" button is positioned next to the Mailing Address field. To the right of the account information is a "News & Announcements" section with a "Coronavirus Update" notice. At the bottom of the account information is an "Account Summary" table. A "Make a Contribution" button is located at the bottom right of the page.

**YOUR ACCOUNTS**

- JOHN SMITH
- JANE SMITH

Click on any name listed below to take action on that account.

[Incomplete Applications](#)

No Incomplete Applications

**JOHN SMITH**

Permanent Address

Mailing Address

Primary Phone:

Secondary Phone: NOT ON FILE

Email:

[Update](#)

**News & Announcements**

**Coronavirus Update**

In response to the evolving Coronavirus situation, we are working to maintain uninterrupted service. You can enroll in the CalABLE Program and/or continue to manage your CalABLE account online anytime. Continuity of service is our highest priority. We will continue to monitor the situation to

**Account Summary**

Your Beneficiary(s)	Account Number	Value
JOHN SMITH		\$13,620.45
JANE SMITH		\$742.78
<b>Total Account Value</b>		<b>\$14,363.23</b>

[Make a Contribution](#)

# Select the Type of Gifting Event



[CONTACT US](#)

- ▼ eGift
- » Create an Event
- [View Events](#)
- [Address Book](#)
- [Contributions Report](#)

## Select Gift Event Details

**Gifting Event\***  **Start Date\***

- Select Event Type
- Select Event Type**
- Birthday
- Congratulations
- Graduation
- Holiday
- Just Because
- Special Occasion

### Select Beneficiary

Click a name below to select

- JAMES TROUT
- KEVIN TROUT

### Select Invitees

Check All

[Manage Contacts](#)

	Name	Email
<input type="checkbox"/>	Malcolm Harmon	Malcolm.Harmon09@outlook.com

### Create Invitation

**From:** Plan Email  
**To:** Invitees Selected from Invitees Section  
**Subject:**

**Dear:** Prefilled from Above Selected Contacts  
**Email Body:\***


Please take this opportunity to give the gift of a better life by clicking the link at the bottom of this email.

Select the Beneficiary the eGift is for.

Select Invitees – You can invite 1 specific contact from your contacts, some of your contacts or all contacts. You can also select when you would like the eGift Email/Event to Start by using the calendar. The date defaults to today's date.

Home Your Account eGift Financials Documents Profile Log Out

### Select Gift Event Details

**Gifting Event\*** Holiday **Start Date\*** 10/28/2020 

#### Select Beneficiary

Click a name below to select.

JOHN SMITH

JANE SMITH

#### Select Invitees

Check All [Manage Contacts](#)

Name	Email
<input checked="" type="checkbox"/>	[Redacted]
<input checked="" type="checkbox"/>	[Redacted]
<input checked="" type="checkbox"/>	[Redacted]

#### Create Invitation

**From:** Plan Email  
**To:** Invitees Selected from Invitees Section  
**Subject:** eGift for A Better Life Experience

**Dear:** Prefilled from Above Selected Contacts

**Email Body:\***

Please take this opportunity to give the gift of a better life by clicking the link at the bottom of this email.

This link will bring you directly to a page where you can gift to our CaABLE account.

Thank you,

JOHN SMITH

When you create the invitation, you can use the default text in the email body, or you can replace the text with the words of your choice.

**Create Invitation**

**From:** Plan Email  
**To:** Invitees Selected from Invitees Section  
**Subject:** eGift for A Better Life Experience

**Dear:** Prefilled from Above Selected Contacts  
**Email Body:\***

Please take this opportunity to give the gift of a better life by clicking the link at the bottom of this email.

This link will bring you directly to a page where you can gift to our CalABLE account.

Thank you,

JOHN SMITH

Below is an example of what your email will look like:


**From:** do\_not\_reply@calable.ca.gov  
**To:** Contact Email  
**Subject:** eGift for A Better Life Experience

Please take this opportunity to give the gift of a better life by clicking the link at the bottom of this email.

This link will bring you directly to a page where you can gift to our CalABLE account.

Thank you,


JOHN SMITH



[Create Event >>](#)

**Select Create Event to continue to the Gift Review Page.**

Review your eGift Event. If you would like to edit the event before sending it, select the edit button. The edit button will bring you back to the Gift Event Details page to make edits. When you are satisfied with the text and the recipients, select continue.



[Contact Us](#)

[Home](#) [Your Account](#) [eGift](#) [Financials](#) [Documents](#) [Profile](#) [Log Out](#)

▼ eGift

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### Gift Event Review

#### Event Details

Gift Event	Start Date
Holiday	10/26/2020

#### Beneficiary(s) Selected

DIANA BERRY

#### Selected Invitees

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#### Invitation

From: do\_not\_reply@calable.ca.gov

To: Contact Email

Subject: eGift for A Better Life Experience

Please take this opportunity to give the gift of a better life by clicking the link at the bottom of this email.

This link will bring you directly to a page where you can gift to our CalABLE account.

Thank you,

JOHN SMITH

[Edit](#) [Continue](#)

You can elect to print your eGift email. Select the Confirm button to send your eGift event email.

**CalABLE**

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▼ eGift

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### Confirm eGift

**You must click Confirm below in order to finalize this eGift event.**

Gift contributions through eGift are subject to the terms and conditions of the Program Disclosure Statement and Participation Agreement, including the Maximum Account Balance Limit requirements of CalABLE. eGift contributions will be invested according to the allocation on file for the account at the time the gift contribution is posted to the CalABLE account.



#### Event Details

Gift Event	Start Date
Holiday	10/26/2020

#### Beneficiary(s) Selected

DIANA BERRY

#### Selected Invitees

Name	Phone	Email

#### Invitation

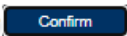
From: do\_not\_reply@calable.ca.gov  
To: Contact Email  
Subject: eGift for A Better Life Experience

Please take this opportunity to give the gift of a better life by clicking the link at the bottom of this email.

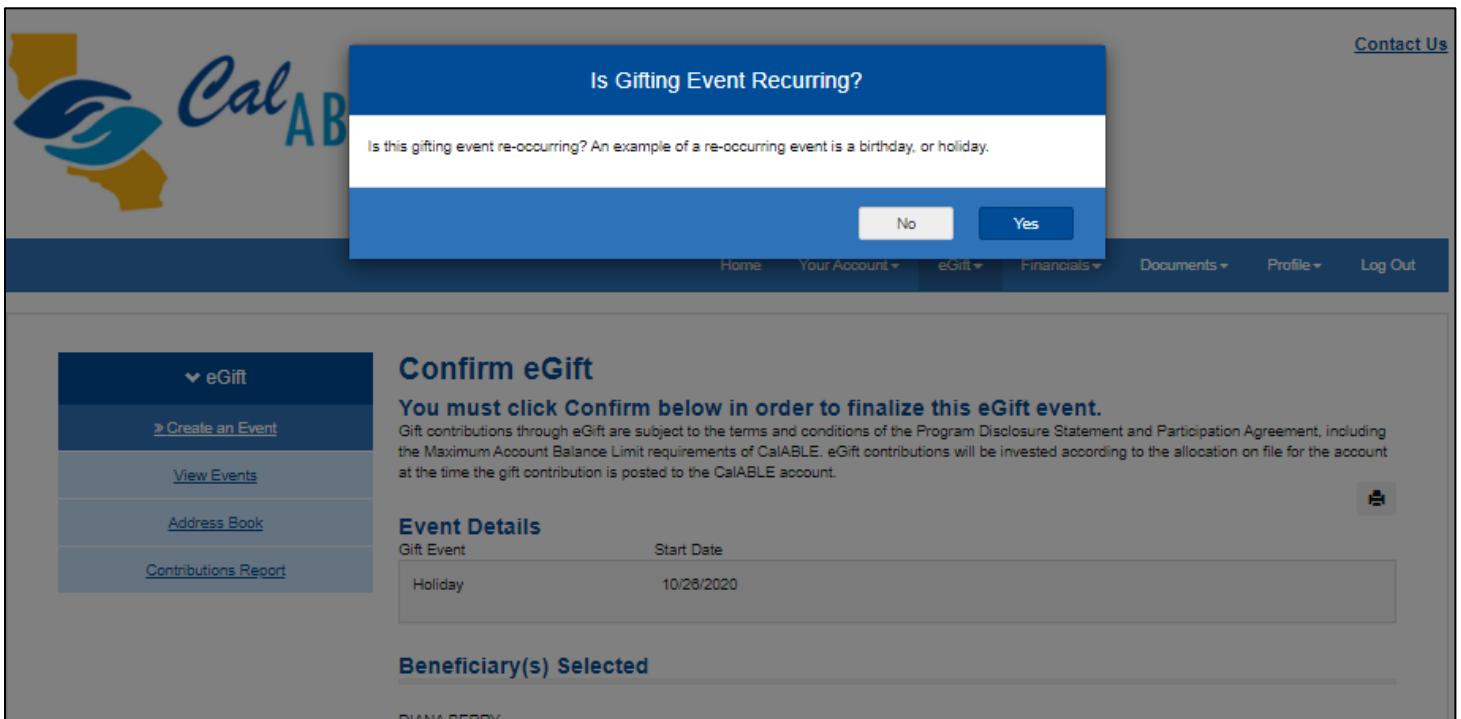
This link will bring you directly to a page where you can gift to our CalABLE account.

Thank you,

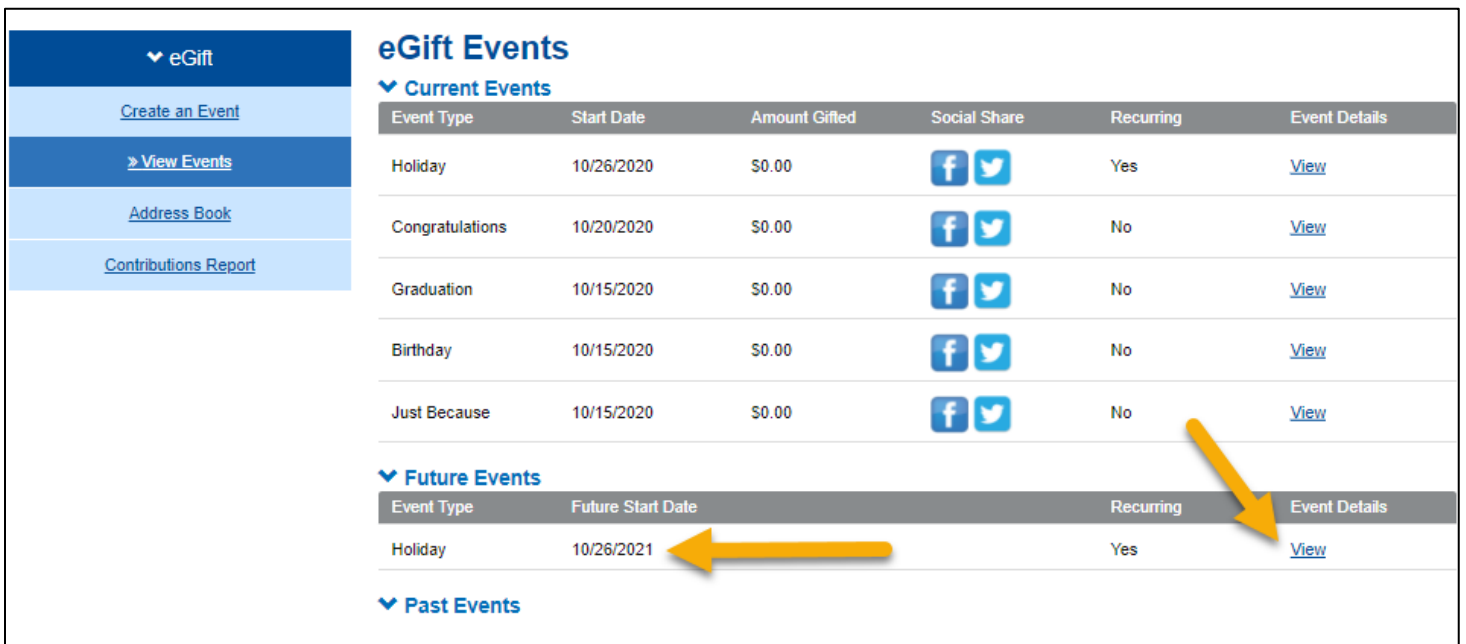
JOHN SMITH



When you select Confirm, you will be asked if the eGift event will be re-occurring. If you select “No,” the email will be sent. If you select “Yes,” the email will be sent, and this same event will be scheduled on the same date the following year.



If “Yes” is selected your eGift Events Page will display your Future Events.



You can view the Event Details, as well as who made contributions by selecting “View.”

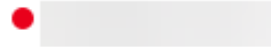
Your Invitee will receive the following email with a secured link to make their contribution:

## eGift for A Better Life Experience



do\_not\_reply@calable.ca.gov

To



Please take this opportunity to give the gift of a better life by clicking the link at the bottom of this email.

This link will bring you directly to a page where you can gift to our CalABLE account.

Thank you,

JOHN SMITH

Click the link to go to the Gifting Page: <https://beta.ablegifting.com/CA/Oa1Oxy>



When the invitee clicks on the secure link they will land on the following page and make their contribution.



## Enter Gift Contribution

You have been invited to contribute to a Gift Event for the below-named Beneficiary's CalABLE account. Your gift will help them achieve a better life experience. Please enter your desired gift amount and your personal banking information below.

The minimum contribution amount is \$25.00. Please note that not all gift contributions may be accepted because there is a limit to how much can be contributed to a CalABLE account each year. The account balance at the time the contribution is processed will determine whether the gift can be accepted.

Event Type : Holiday

Giftee

DIANA BERRY

Gift Amount\*

\$ 0.00

Total Amount:

\$ 0

### Account Details

First Name\*

Last Name\*

Email\*

Bank Name\*

Account Type\*

Select One



Routing Number\*

Account Number\*

\* We do not save your financial information

\*If you provide your email, we will only use it to confirm your gift contribution.

I agree with the [Terms and Conditions](#) for my gift contribution



Exit

Send Gift

**Event Details:** In the Event Details page you can share your event from your account to Facebook and Twitter or other social network platforms. All you need to do is copy and paste the link. View who has contributed to this specific event by clicking on “View Event Details.”

- ▼ eGift
- [Create an Event](#)
- » [View Events](#)
- [Address Book](#)
- [Contributions Report](#)

### Your Current eGift Event Details

Gift Event	Start Date	Deactivate	Auto Recur	Social Share
Congratulations	11/26/2021	<input type="checkbox"/>	<input type="checkbox"/>	 

Beneficiary Name	Account #	Amount Gifted
JAMES TROUT	2200005150	\$0.00
KEVIN TROUT	2200006734	\$0.00

[View Contribution Details](#)

Total: \$0.00

### Would you like to change your current invitees?

Check All

[Manage Contacts](#)

Name	Email
<input checked="" type="checkbox"/> Malcolm Harmon	Malcolm.Harmon09@outlook.com

### Would you like to edit/view your invitation?

**From:** Plan Email  
**To:** Invitees Selected from Invitees Section  
**Subject:**

**Dear:** Prefilled from Above Selected Contacts

**Email Body:\***

Please take this opportunity to give the gift of a better life by clicking the link at the bottom of this email.

This link will bring you directly to a page where you can gift to our CalABLE account.

Thank you,

ROBERT J. TROUT

You can also check and see who has made an eGift Contribution.

CalABLE

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eGift

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### eGift Contribution Detail Report

Gift Event	Start Date	Deactivated Date
Holiday	10/26/2020	

DIANA BERRY - Acct #: 2200003859

Name	Email	Amount
		Total Gifted: \$0.00

You can “Deactivate” an Event at any time by checking “Deactivate.”

CalABLE

Home Your Account eGift Financials Documents Profile Log Out

eGift

- Create an Event
- View Events
- Address Book
- Contributions Report

### Your Current eGift Event Details

Gift Event	Start Date	Deactivate	Auto Recur	Social Share
Holiday	10/26/2020	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Beneficiary Name Account # Amount Gifted

DIANA BERRY 2200003859 \$0.00

Total: \$0.00

View Contribution Details

CalABLE

Are you sure you want to deactivate this event and move it to the Past Events section?

Once this event ends you will no longer be able to receive gift contributions towards it.  
A new event can be created at any time.

Cancel Confirm

Documents Profile Log Out

### Your Current eGift Event Details

Gift Event	Start Date	Deactivate	Auto Recur	Social Share
Holiday	10/26/2020	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Beneficiary Name Account # Amount Gifted

DIANA BERRY 2200003859 \$0.00

Total: \$0.00

View Contribution Details