

# Florida Public Pension Trustees Association

## 2019 Associate Membership Brochure

Included in this brochure:

### **FPPTA** Board of Directors

**Pete Prior, CPPT**  
Chairperson

**Tim Olsen, CPPT**  
Vice-Chairperson

**Ann Thompson, CPPT**  
Secretary

**Steve Aspinall, CPPT**  
Treasurer

**Christopher Spencer,  
CPPT**  
Director

**Dwight Mattingly, CPPT**  
Director

**Warren West, CPPT**  
Director

**Renee Lipton, CPPT**  
Director Emeritus

**Ken Harrison, CPPT**  
Director Emeritus

**Ray Edmondson, CPPT**  
Director Emeritus  
1937-2017

### ● **2019 Membership Form**

### ● **Services Provided Form**

### ● **2019 Mailing List Form**

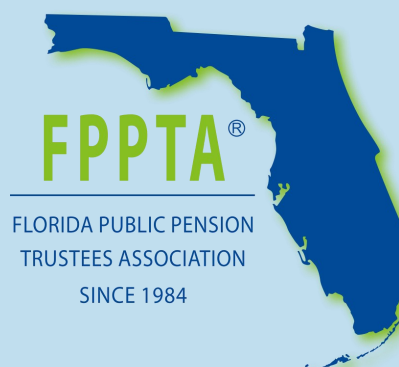
For a detailed list of fees, please see the Membership Brochure. For sponsorship information, please see the Sponsorship Brochure.

## **FPPTA Mission Statement**

The FPPTA has been established for the purpose of providing education and information for the public pension system and protecting Defined Benefit Plans.

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Florida Public Pension Trustees Association  
2946 Wellington Circle East  
Tallahassee, FL 32309  
Phone: 800-842-4064 • Fax: 850-668-8514



## ► 2019 Yearly Membership Form

**THIS MEMBERSHIP FORM IS FOR FIRST TIME MEMBERS ONLY.**

**Renewing members must log-in to [www.fppta.org](http://www.fppta.org) and renew online.**

**New members**, please be sure to complete this form in its entirety and return it to the FPPTA office.

**2019 Yearly Associate Membership**

**\$1,900 per year payment due upon receipt**

### Company Information (Please print clearly)

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Website: \_\_\_\_\_

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**[www.fppta.org](http://www.fppta.org)**

Once membership has been established, FPPTA has made it convenient for you to access, fill-out, and submit all of your registrations online as well as make payments with your credit card that automatically generates a printable receipt or by tele check. In addition, you can find information regarding our CPPT program, Board of Directors, Advisory Board, Education Committee, service providers, upcoming events, membership, Legislative updates and links to State and Federal government websites.

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### Payment Information

☐ Check Enclosed   ☐ Check to Follow

Please make checks payable to: Florida Public Pension Trustees Association (FPPTA)

In order to be PCI compliant FPPTA will no longer accept credit card information on our registration forms. All credit card payments must be made through our secure website or by contacting Lea Herrell at (800) 842-4064 ext. 103.

The information provided in the Associate Membership Form will be posted to the FPPTA website. Members have the ability to search Associate Members and their product offerings.

**Please choose the appropriate category:**

- |   |  |
|---|--|
| <input type="checkbox"/> Accountant/CPA Firm            | <input type="checkbox"/> Money Managers                  |
| <input type="checkbox"/> Actuaries                      | <input type="checkbox"/> Real Estate                     |
| <input type="checkbox"/> Attorneys                      | <input type="checkbox"/> Securities Monitoring           |
| <input type="checkbox"/> Commission Recapture Brokerage | <input type="checkbox"/> Transition Management Brokerage |
| <input type="checkbox"/> Direct Brokerage Services      | <input type="checkbox"/> Third Party Administrator       |
| <input type="checkbox"/> Investment Consultant          | <input type="checkbox"/> Third Party Marketing           |
| <input type="checkbox"/> Litigation                     | <input type="checkbox"/> Trust Custody                   |

**Professional Services:**

<b>Domestic Equities:</b> ___ Commingled ___ Mutual Funds ___ Separate Accounts ___ Large Cap Core ___ Large Cap Growth ___ Large Cap Value ___ Mid Cap Core ___ Mid Cap Growth ___ Mid Cap Value ___ Small Cap Core ___ Small Cap Growth ___ Small Cap Value ___ Other _____	<b>Domestic Fixed Income:</b> ___ Commingled ___ Mutual Funds ___ Separate Accounts ___ Government ___ Corporate ___ Agencies ___ Short Term Yield ___ Core ___ Core Plus ___ High Yield ___ Other _____	<b>International Equities:</b> ___ Commingled ___ Mutual Funds ___ Separate Accounts ___ Large Cap Core ___ Large Cap Growth ___ Large Cap Value ___ Mid Cap Core ___ Mid Cap Growth ___ Mid Cap Value ___ Small Cap Core ___ Small Cap Growth ___ Small Cap Value ___ Other _____	<b>International Categories:</b> ___ Commingled ___ Mutual Funds ___ Separate Accounts ___ Global ___ ADR's ___ EAFE ___ European ___ Pacific Rim ___ Latin America ___ Emerging Markets ___ Other _____
<b>Real Estate:</b> ___ Commingled ___ Separate Accounts ___ Opportunistic ___ Core ___ Value Added ___ High Yield ___ European ___ United States ___ Latin America ___ Florida ___ Other _____	<b>International Fixed Income:</b> ___ Commingled ___ Mutual Funds ___ Separate Accounts ___ Government ___ Corporate ___ Aggregate ___ Short Term Yield ___ Core ___ Core Plus ___ High Yield ___ Other _____	<b>Hedge Funds:</b> ___ Commingled ___ Separate Accounts ___ Convertible Arbitrage ___ Merger Arbitrage ___ Event Driven ___ Distressed Securities ___ Equity market Neutral ___ Equity Long/Short ___ Florida ___ Other _____	<b>Feed Back</b> Please let us know if you would like a category added to the FPPTA website. The purpose of the Professional Services on our website is to better inform our trustees of the products you offer. We encourage our pension board members to utilize the website and support our member service providers.

## 2019 Mailing List

Please provide the names and addresses of colleagues within your company that you would like to receive mailings from the FPPTA. **Please note that in order for any associate to log-in to the FPPTA website, we must have a current email address on file. Your e-mail addresses will not be shared and are for FPPTA use only.**

Please print clearly:

**Company Name:** \_\_\_\_\_

**Contact Person:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip code:** \_\_\_\_\_

**Email:** \_\_\_\_\_ **Phone Number:** \_\_\_\_\_

**Colleagues:** Once membership is activated, this may also be updated by logging into the FPPTA website. Your firm contacts may edit contact information at any time to ensure we have the most current information on file.

▶ **Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Email:** \_\_\_\_\_ **Phone Number:** \_\_\_\_\_

▶ **Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Email:** \_\_\_\_\_ **Phone Number:** \_\_\_\_\_

▶ **Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Email:** \_\_\_\_\_ **Phone Number:** \_\_\_\_\_

▶ **Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Email:** \_\_\_\_\_ **Phone Number:** \_\_\_\_\_

▶ **Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**E-mail:** \_\_\_\_\_ **Phone Number:** \_\_\_\_\_