

# New Pension Board Membership Form



## **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.

## Certified Public Pension Trustee Program—CPPT



The FPPTA launched the Certified Public Pension Trustee (CPPT) program in 1997. The goal of the CPPT program is to prepare trustees to perform their duties with confidence and expertise, and to instill in them the value of continuing education in an ever-changing landscape. The CPPT program is an educational track designed to be completed over the course of three FPPTA Trustee Schools within a three-year time frame. Students are expected to complete and pass a test for each of the three program tiers: Basic, Intermediate, and Advanced.

The curriculum covers a wide range of topics and lectures that will prepare trustees for the procedures that are legally mandated; the ethical and fiduciary rules that should inform trustees' actions; activities of the professionals hired by the pension board; and the day-to-day decisions likely to arise in the ordinary course of the trustee's duties and activities.

Certification is only awarded after a trustee has been successfully tested on the knowledge acquired in the classroom. Should a trustee fail any part of the program, that part of the program must be repeated and successfully re-tested. Once a student has completed the program, they are required to obtain continuing education credits each year in order to retain their CPPT designation.

The certification program requires a monetary commitment from the pension board and a time and study commitment from program participants.

## Pension Fundamentals for New Trustees

This new program is intended to be a primer for a new trustee walking into their role on the pension board. This one day virtual program will cover the various roles people play in the pension system, give a run down of how a defined benefit plan works, and familiarize a new trustee with the language, players, and lay of the land they'll come to know in their new role. In addition to this program, participants will receive access to a digital reference book full of useful information for trustees no matter their experience level. This program does *not* offer CEU credits. **This program is a requirement for any trustee intending to enroll in the CPPT Program — trustees must complete this program before entering into the Basic CPPT course.**

## FPPTA.org

[www.fppta.org](http://www.fppta.org) is the gateway for information about events, dates, registration, recertification, membership renewal, and all the current and upcoming education programs and events. The website is easy to navigate and keeps all trustee member information secure. Trustees can register for events or classes, and access virtual – and archived – education programs from a secure platform.

It is also a portal to the many extras we provide our members. Here, trustees will find **Resources** like the Pension Plan Data Center and the FPPTA Tool Box, which houses research, infographics, videos and tutorials on subjects ranging from pension funding facts, to *how-to* tutorials. Also housed on the website are the FPPTA's publications, a digital handbook for pension boards, and information about the FPPTA Relief Fund and Raymond T. Edmondson Scholarship programs.

The website gives our trustee members access to all the ancillary tools the FPPTA makes available only to members. It is a well-developed, versatile support vehicle and always current source of information.

## 2023 New Membership Form for Pension Boards

**This membership form is for first time members only. This is not intended for current members renewing membership. Renewing members must log-on to [fppta.org](http://fppta.org) and renew on-line.**

## 2023 Membership Fee

2023 Membership is \$750 for the Pension Board for the year. Membership runs from January 1, 2023 through December 31, 2023.

**Pension Board Name:** \_\_\_\_\_

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

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

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

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

**Administrator:** \_\_\_\_\_

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

## Completed Form

Please send the completed Membership Form to: MJ Chwalik at [MJ@fppta.org](mailto:MJ@fppta.org). Once the form is received FPPTA staff will create the pension boards profile. You will receive notification when this is completed.

Thank you for your membership!

## FPPTA Contact Information

**Mailing Address:** 2946 Wellington Circle East, Tallahassee, FL 32309

**Phone:** 800-842-4064 \* **E-mail:** [fppta@fppta.org](mailto:fppta@fppta.org) \* **Website:** [FPPTA.org](http://FPPTA.org)

## Trustee Contact Information

\*Please provide the names and addresses of the members of the board.

\*It is vitally important to have an e-mail address on file as the FPPTA communicates solely through e-mail.

**Trustee Name:** \_\_\_\_\_

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

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

**Trustee Name:** \_\_\_\_\_

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

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

**Trustee Name:** \_\_\_\_\_

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

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

**Trustee Name:** \_\_\_\_\_

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

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

**Trustee Name:** \_\_\_\_\_

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

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