

# New Pension Board Membership Form



Florida Public Pension Trustees Association



## Certified Public Pension Trustee Program - CPPT



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. Program participants 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.

Once a program participant 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 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.**

## Trustee Leadership Council (TLC)

The Trustee Leadership Council is a new program designed for the more seasoned trustees, requiring participants to have their CPPT designation in order to register. The cumulation of all FPPTA educational programs provides participants in this program to put their knowledge to work in this three-level yearlong course. Enrollees will dissect case studies of pension plans and assess the decisions made at various stages of plan funding. It will challenge traditional thinking around plan design and the best ways to safeguard and grow the fund to meet its obligations. Participants will be tasked with consensus building, team work, and collaboration. All in all, this is a course of rigor, but a unique opportunity to experience trustee education at the crossroads of conceptual and practical.

## 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. Trustees can register for events or classes, and access virtual – and archived – education programs from a secure platform.

The FPPTA website also hosts resources like the Pension Plan Data Center and the FPPTA Tool Box, which houses research and communications tools. 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.

## 2025 New Membership Form for Pension Boards

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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.

### 2025 Membership Fee

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2025 Membership is \$750 for the Pension Board for the year. Membership runs from January 1, 2025 through December 31, 2025.

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

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

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

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

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

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

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

### Completed Form

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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 board's profile. You will receive notification when this is completed.

Thank you for your membership!

### FPPTA Contact Information

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

**Phone Number:** 800-842-4064

**E-mail:** [fppta@fppta.org](mailto:fppta@fppta.org)

**Website:** [FPPTA.org](http://FPPTA.org)



# Trustee Contact Information

- Please provide names and addresses of the members on 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 Number: \_\_\_\_\_

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

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

E-mail: \_\_\_\_\_

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

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

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

E-mail: \_\_\_\_\_

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

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

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

E-mail: \_\_\_\_\_

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

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

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

E-mail: \_\_\_\_\_

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