

2025 GAPPT ANNUAL REPORT



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OUR MISSION

In 2009, the GAPPT was established as a nonprofit organization solely dedicated to promote education for public retirement system fiduciaries, and we strongly believe "an educated fiduciary is an effective fiduciary™". In addition to our Certified Retirement Plan Fiduciary™ curriculum, the GAPPT offers educational programming with topics pertinent to public retirement plan trustees and staff members.



IN APPRECIATION

This year would not have been possible with our dedicated Board of Directors, valued committee members, supportive sponsors and knowledgeable presenters. Thank you also to all our members who participated in our educational sessions... The commitment you make on behalf of your plan and beneficiaries is inspiring.

STRATEGY

In 2025, GAPPT's strategy was centered on listening to and responding to the needs of our members while continuing to strengthen the Association's long-term value. We heard directly from members through a membership survey that focused on the value of GAPPT membership and events, as well as feedback on the cost and location of educational programs, and used these insights to guide planning and decision-making.

As part of this commitment, the GAPPT successfully applied for and was approved by the National Association of State Boards of Accountancy (NASBA), as a registered sponsor on the National Registry of CPE Sponsors. This accreditation along with the IACET accreditation, further enhances the quality and credibility of the GAPPT's educational offerings.

We also hosted our Annual Conference at a brand-new location, the beautiful Château Élan, reflecting our focus on delivering high-quality experiences in settings that support learning and connection.

These efforts contributed to strong engagement and measurable growth, including a 30% increase in new plan membership in 2025, reinforcing GAPPT's role as a trusted educational resource for public retirement plan fiduciaries.

Looking Back at 2025...

MEMBERSHIP



68

Plans



114

New Plan Sponsor
& Affiliate
members



7%

increase in
plan
membership

EVENTS



78

Presenters



64

Sessions



615

Registrants



2

Educational
Events

EDUCATION



3,912

GAPPT CECs Earned



238

IACET CEUs Earned



951

NASBA CPEs Earned



17

New CRPF™
Designees

FINANCIALS

Sources of Funding...

Online Classes

1.3%

Other

4.4%

Event Fees

69.2%

Dues

25.1%



Annual Expenses

2025...

Other

8.1%

Event Costs

45.4%

Operations

6%

Payroll

38.6%



Additional Remarks

MEMBER DUES

438 Plan Sponsor Members

207 Affiliate Members

5 Emeritus Members

EVENT FEES

2025 events included the Sixteenth Annual Conference, GAPPT Night with the Atlanta Braves, and the Eleventh Annual Trustee School.

SPONSORSHIPS

32 Affiliate firms generously supported the Association and its members through event sponsorships.



EDUCATION

Noteworthy in 2025

NASBA National Registry of CPE Sponsors

On May 9, 2025, the National Association of State Boards of Accountancy (NASBA) approved the GAPPT as a registered sponsor on the National Registry of CPE Sponsors.

Three CRPF™ Scholarship Recipients

In 2025, the GAPPT granted 3 CRPF™ scholarships, including one scholarship to an out-of-state plan. This initiative aligns with our marketing strategic goal of expanding awareness and sharing the benefits of the GAPPT to surrounding states.

GAPPT Online Education

Interest in online sessions continued to meet the demand of our members in 2025. The online platform saw an increase of purchased sessions from 2024 of over 60%.

Leading Education Through Accreditation™

Since its establishment in 2009, the GAPPT has promoted high-quality, comprehensive, and unbiased education for public retirement system trustees and plan staff members. It is because of this core belief that the GAPPT decided to seek the International Accreditors for Continuing Education and Training (IACET) prestigious Accredited Provider accreditation. Internationally recognized as offering the highest quality continuing education and training programs, IACET Accredited Providers are the only organizations approved to offer IACET Continuing Education Units (CEUs).

After a rigorous review process, the Association was awarded Accredited Provider status on February 1, 2022. The GAPPT has always had the utmost confidence in its educational programming. It is proud to be the **first trustee education organization to be third-party accredited** and is "Leading Education through Accreditation™".

In addition to the IACET accreditation, on May 9, 2025, the National Association of State Boards of Accountancy (NASBA) approved the GAPPT as **a registered sponsor on the National Registry of CPE Sponsors**.

To achieve status as a registered sponsor, the GAPPT had to demonstrate compliance with the Statement of Standards for Continuing Professional Education (CPE) Programs and the program requirements of the National Registry of CPE Sponsors. The **greatest benefit** of becoming a registered sponsor is that all 55 State Boards of Accountancy accept CPE credit issued by Registry sponsors to satisfy a CPA's CPE requirements.



The Georgia Association of Public Plan Trustees® is accredited by the International Accreditors for Continuing Education and Training (IACET) and offers IACET CEUs for its learning events that comply with the ANSI/IACET Continuing Education and Training Standard. IACET is recognized internationally as a standard development organization and accrediting body that promotes quality of continuing education and training.

The Georgia Association of Public Plan Trustees® is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.NASBARegistry.org.





MEMBERS

The GAPPT would not be possible without the time and talent of our member volunteers.

GAPPT Board of Directors

PRESIDENT

Tim Milligan, CRPF™

VICE PRESIDENT

Ramona Bivins, CRPF™

SECRETARY

Matt Hamby, CRPF™

TREASURER

David Harris, CRPF™

DIRECTOR AT LARGE

Paul Bronson, CRPF™

DIRECTOR AT LARGE

David Ward, CRPF™

DIRECTOR AT LARGE

Keisha Register, CRPF™

DIRECTOR AT LARGE

Jason Justice, CRPF™

AFFILIATE CHAIR

AJ Baltozer

And a special thank you to those who volunteered to serve one or more of the following GAPPT committees:

Affiliate Committee

Audit Committee

Board Development Committee

Communications Committee

CRPF™ Leadership Team

Finance Committee

Government Affairs Committee

Marketing Committee

Membership Committee

Program Committee

Rules Committee