

# Eleventh Annual Trustee School



September 15 -17, 2025

Edgar H. Wilson Convention Center | Macon, Georgia

**SPONSOR PROSPECTUS**



**CRPF<sup>TM</sup>**

Certified Retirement  
Plan Fiduciary<sup>TM</sup>

# An educated fiduciary is an effective fiduciary.™

In 2009, the GAPPT was established as a nonprofit organization dedicated to promoting education for public retirement system fiduciaries. The Eleventh Annual Trustee School will offer the Certified Retirement Plan Fiduciary™ curriculum and a continuing education course with sessions covering applicable laws, roles and responsibilities, ethics, plan governance, actuarial principles, and investments.

## Who Attends

Trustee School attendees include public retirement system trustees and staff members, as well as professional service providers of public retirement plans.

## Why Attend

In addition to its engaging educational sessions, the Trustee School will offer various networking opportunities to meet other retirement professionals and share insights and information.

## Trustee School Features

The Trustee School has two full days of educational programming. Participants can register for the Certified Retirement Plan Fiduciary™ program or a continuing education course. (Affiliates have the additional option to register as a "networking only" attendee.)

Breakfast and lunch are provided to all attendees, and networking receptions are held on Monday and Tuesday evenings.

Regardless of course selection, Plan Sponsor attendees can earn up to fourteen of their state-required educational hours!



**Take Advantage of Early-Bird Registration Before August 25th!**

**Plan Sponsor Members \$169.00**

**Affiliate Members \$620.00**

**Guests \$99.00**

Please visit [www.gappt.org](http://www.gappt.org) for information about non-member rates and guest qualifications.  
*Beginning August 25, 2025, rates will be \$199.00 for Plan Sponsor members and \$720.00 for Affiliate members.*



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.



# ANTICIPATED AGENDA

## Sunday, September 14, 2025

5:30 PM: **CRPF™ Designee Reception** (Invitation Only)

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## Monday, September 15, 2025

7:00 AM: **Registration Opens**  
7:15 AM - 8:15 AM: **Breakfast**  
8:15 AM - 9:20 AM: **General Session**  
9:20 AM - 9:35 AM: **Morning Break**  
9:35 AM - 9:50 AM: **Course Introduction Sessions**  
9:50 AM - 10:40 AM: **Breakout Sessions** (All Courses)  
10:50 AM - 11:40 AM: **Breakout Sessions** (All Courses)  
11:40 AM - 12:35 PM: **Networking Lunch**  
12:40 PM - 1:30 PM: **Breakout Sessions** (All Courses)  
1:40 PM - 2:30 PM: **Breakout Sessions** (All Courses)  
2:30 PM - 2:50 PM: **Afternoon Break**  
2:50 PM - 3:40 PM: **Breakout Sessions** (All Courses)  
3:50 PM - 4:40 PM: **Review Sessions** (CRPF™ Courses)  
**Breakout Session** (Continuing Education Course)  
5:30 PM - 6:30 PM: **Cocktail Reception**  
6:30 PM: **Dinner and Evening on Your Own**

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## Tuesday, September 16, 2025

7:30 AM: **Registration Opens**  
7:30 AM - 8:40 AM: **Breakfast**  
8:40 AM - 9:30 AM: **Breakout Sessions** (All Courses)  
9:30 AM - 9:50 AM: **Morning Break**  
9:50 AM - 10:40 AM: **Breakout Sessions** (All Courses)  
10:50 AM - 11:40 AM: **Breakout Sessions** (All Courses)  
11:40 AM - 12:35 PM: **Networking Lunch**  
12:40 PM - 1:30 PM: **Breakout Sessions** (All Courses)  
1:40 PM - 2:30 PM: **Breakout Sessions** (All Courses)  
2:30 PM - 2:50 PM: **Afternoon Break**  
2:50 PM - 3:40 PM: **Breakout Sessions** (All Courses)  
3:50 PM - 4:40 PM: **Review Sessions** (CRPF™ Courses)  
**Breakout Session** (Continuing Education Course)  
5:30 PM - 6:30 PM: **Cocktail Reception**  
6:30 PM: **Dinner and Evening on Your Own**

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## Wednesday, September 17, 2025

7:30 AM: **Continental Breakfast Available**  
8:00 AM - 9:30 AM: **CRPF™ Course Examinations**

All educational sessions, meals, and  
receptions will be held at the Edgar H. Wilson  
Convention Center.







## Macon Marriott City Center

Located in the heart of Macon, the Macon Marriott City Center is the city's only 4-Diamond full-service hotel. Connected to the Edgar H. Wilson Convention Center, Trustee School attendees will be just steps away from the event's educational sessions.

**The group rate is \$127.00 plus tax per night and is available until August 25, 2025 or until the block sells out.**



**A link to the group rate will be available on the Trustee School registration confirmation email. Room rates and availability are not guaranteed.**

*The Macon Marriott City Center is located at 240 Coliseum Drive, Macon, Georgia, 31217. The hotel is approximately 77 miles from Hartsfield-Jackson Atlanta International Airport and 14 miles from the Middle Georgia Regional Airport.*



# TRUSTEE SCHOOL SPONSORSHIP OPPORTUNITIES



## Why Sponsor

The GAPPT has 650 members representing over 23 billion dollars in plan assets. The Association's events historically see a plan sponsor to affiliate ratio of 1:1 which allows maximum engagement and visibility.

### PLATINUM LEVEL

**\$2,300.00**

Recognition in All Three  
Trustee School Course Books

Recognition on the Event  
App, GAPPT|ACCESS

Recognition on Platinum  
Level Signage

Half Page Advertising Space  
in All Three Trustee School  
Course Books

Half Page Advertising Space  
in the GAPPT Newsletter

Acknowledgment in the  
Online "Monthly Memo"

Recognition and Signage at  
Your Preferred Trustee  
School Networking Event

Attendee List with Contact  
Information

### GOLD LEVEL

**\$1,800.00**

Recognition in All Three  
Trustee School Course Books

Recognition on the Event  
App, GAPPT|ACCESS

Recognition on Gold Level  
Signage

Quarter Page Advertising  
Space in All Three Trustee  
School Course Books

Quarter Page Advertising  
Space in the GAPPT  
Newsletter

Acknowledgment in the  
Online "Monthly Memo"

Attendee List with Contact  
Information

### SILVER LEVEL

**\$1,250.00**

Recognition in All Three  
Trustee School Course Books

Recognition on the Event  
App, GAPPT|ACCESS

Recognition on Silver Level  
Signage

Acknowledgment in the  
Online "Monthly Memo"

Attendee List with Contact  
Information

## Sponsor Benefits and Rates

Affiliate members may purchase sponsorships during the event registration process. Only GAPPT Affiliate members in good standing may become sponsors. Sponsorships do not include attendee registration fees and are nonrefundable. All invoice payments must be received thirty (30) days before the event date for inclusion in any printed material. Sponsors are solely responsible for submitting material before the print deadline. Additional information and due dates will be emailed upon registration. Visit [www.gappt.org](http://www.gappt.org) for more information.



# SPONSOR GUIDELINES

## TRUSTEE SCHOOL OVERVIEW:

The GAPPT Trustee School is an annual educational opportunity offered to public retirement system trustees, plan staff members, and professional service providers of public retirement plans.

## IMPORTANT DATES:

- August 18, 2025:** Firm Information Due  
Sponsor Invoices Due  
Program Ad Due (*Platinum/Gold Only*)
- August 25, 2025:** Late Registration Begins
- September 3, 2025:** Event App Publication
- October 8, 2025:** Newsletter Ad Due (*Platinum/Gold Only*)
- November 1, 2025:** Third Quarter Newsletter Publication

## MATERIAL SUBMISSION:

All material is submitted during the Trustee School registration process. Information received after August 18, 2025, is not guaranteed for inclusion.

**Firm Logo:** Logos will be included on the event app, and a dedicated sponsor page will be included in the printed course books. Sponsor logos will also be included in other event signage. Please provide an image of the highest quality available. (TIF, GIF, or PNG preferred.)

**Other Firm Information:** The event app will list additional information, including a brief firm summary (1-2 paragraphs), the firm's URL address, and social media URL addresses.

**Program Advertisement:** (*Gold and Platinum Sponsors Only.*) Provide a high-quality formatted advertisement in the appropriate size. A different advertisement may be used for newsletter publication but must be received by the October deadline.

**Platinum Sponsor Ad Size:** 7.5" wide x 4.75" high (horizontal) or 3.5" wide x 9.5" high (vertical)

**Gold Sponsor Ad Size:** 3.5" wide x 4.75" high

## EXHIBITS:

Due to the event's educational focus, exhibit space is not provided at the GAPPT Trustee School.

## EVENT SPONSORSHIP AND SIGNAGE:

(*Platinum Sponsors Only.*) Selection of the sponsored networking event/meal is on a first come basis. Signage will be placed in the event area and the firm name will be listed next to the event on the conference schedule.

## SPONSOR ATTENDEE LISTS:

The sponsoring member will be emailed a registrant list with email and phone contacts three weeks before the Trustee School on August 27, 2025. A final attendee list will be emailed on October 6, 2025. **Additional lists on demand will not be provided.**

## SPONSOR SUPPORT:

Before the Trustee School dates, please contact Sue Reynolds at [sue@gappt.org](mailto:sue@gappt.org) or 770-295-8209 for assistance. GAPPT staff will be available at the registration desk during the Trustee School for any onsite questions or concerns.





# ATTENDEE INFORMATION

## REGISTRATION RATES:

Registration rates are conditional upon an individual's GAPPT member status. The GAPPT does not offer per-day rates for its events. All attendees, including presenters, will be charged the applicable rate regardless of their arrival or departure date.

## GUEST REGISTRATION:

A guest is a spouse, significant other, friend or an adult child (21 years old or older) who is not in a retirement industry-related occupation. An individual employed by actuarial, consulting, custodial, legal, plan administration, or investment management firm cannot be considered as a guest. All guests must be registered to attend GAPPT events, and must wear their name badge.

Guest registration includes GAPPT-hosted Trustee School meals and networking events. (This is a \$400.00 value.)

## REGISTRATION DEADLINE:

Early-bird rates are available until August 24, 2025.

Attendees may register after this date, but higher event fees will apply.

## REFUNDS:

To receive a refund, notification must be received on or before August 24, 2025, and will be subject to a \$25.00 processing fee. **No refunds will be given to cancellations received on or after August 25, 2025.**

## CERTIFIED RETIREMENT PLAN FIDUCIARY™ PROGRAM:

The GAPPT offers trustees and staff members a certification program developed to address the six educational areas listed in the Georgia Code. To receive a Certified Retirement Plan Fiduciary™ (CRPF™) designation, participants must successfully complete the Basic and Advanced Courses.

## PREREQUISITES:

There are no prerequisites to register for the Basic Course or the Continuing Education Course. Successful completion of the Basic Course is required to register for the Advanced Course.

CRPF™ Basic and Advanced Course participants must attend all their course sessions and in the assigned order.

## ATTENDEE VERIFICATION:

Attendees must present a valid driver's license or government ID to receive a name badge.

## NAME BADGES AND SESSION ATTENDANCE:

Name badges must be worn during all educational sessions and GAPPT-hosted networking events. The name badge's QR code will be used to verify session attendance.

## EQUIPMENT REQUIREMENTS:

The GAPPT provides the following:

**CRPF™ Basic and Advanced Course Attendees:** Course Book, Highlighter, Pencil, and Course Examination

**Continuing Education Course Attendees:** Printed Program (optional)

*It is recommended that all participants bring a laptop*

*computer, tablet, or smartphone to utilize the event app.*

*Public internet access will be available in the meeting rooms.*

## LEARNER ACCOMMODATIONS:

Attendees may request accommodations for technical support, seating arrangements, and general assistance. If available, alternative formats for event material will be provided. Accommodation requests should be emailed to [info@gappt.org](mailto:info@gappt.org) before August 25, 2025.

## SESSION DESCRIPTION:

A summary of the session is listed in the event app and printed program (if provided).

## SESSION LEARNING OUTCOMES:

A session's learning outcomes are listed in its slide presentation and reviewed at its beginning and end. CRPF™ Basic and Advanced Course presentations are included in their Course Books. Continuing Education Course presentations (if provided) are included on the event app.

## CRPF™ BASIC AND ADVANCED COURSE EXAMINATIONS:

A fifty (50) question assessment of multiple-choice or true-false questions is required for Basic and Advanced Course attendees. Participants must receive a 70% or higher score to complete the examination successfully. Examinations and pencils are provided to the participants.

## CONTINUING EDUCATION COURSE ASSESSMENT:

The GAPPT uses presenter observations, attendance, and evaluation results to measure participants' achievement of the learning outcomes.

## GAPPT CONTINUING EDUCATION CREDITS:

Participants must have their name badge QR code scanned to qualify for GAPPT CECs. Scanning is available 15 minutes before the scheduled start of a session and 15 minutes after the session begins. The number of CECs awarded is based on the length of the session

## IACET CONTINUING EDUCATION UNITS:

To earn IACET CEUs, participants must attend a session and also complete its evaluation to ensure they met the learning outcomes.

## CPE CREDITS (NASBA):

To earn CPE credits, participants must have their name badge scanned upon entering and exiting the session room. The delivery method of the Trustee School is Group Live. No advanced preparation is required for the CRPF™ Courses or Continuing Education Course sessions. The program level is considered basic. A session's field of study and CPE credits will be listed in the course book and on the event app. For additional questions, please contact [info@gappt.org](mailto:info@gappt.org).

The GAPPT 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](http://www.nasbaregistry.org).





# ATTENDEE INFORMATION

## ATTENDEE EVALUATIONS:

Participants will have the opportunity to evaluate presenters on their material, delivery, and subject matter expertise. This data will be utilized for educational event planning and future presenter consideration. Evaluation results will be made available to the presenter upon their request. Attendees are also encouraged to complete the Attendee Event Evaluation after the Trustee School.

## EDUCATIONAL POLICIES:

A listing of the Association's educational policies, including the Event Behavior Policy, Anti-Discrimination Policy, Policy for Disclosure of Financial and Proprietary Interest, Policy for Intellectual and Legal Property Rights, Policy for Privacy and Information Security, Refund Policy, Complaint Policy, and Program Cancellation Policy can be viewed at: <https://gappt.memberclicks.net/policies>

## NOTIFICATION OF CRPF™ COURSE COMPLETION AND CERTIFICATES:

On October 3, 2025, CRPF™ participants will be notified via email whether they successfully or unsuccessfully completed their course. Notification is either a "pass" or "fail." Exam scores will be released upon email request and to the individual only. The course completion date will also be listed in their GAPPT member profile.

Certificates will be mailed to participants who successfully complete the CRPF™ Basic or Advanced Course. Certificates are mailed to the participant's organization address within 30 days of the event's conclusion.

## MEMBER-HOSTED EVENTS:

Affiliates should not host client events during scheduled conference sessions, meals, or networking activities.

## SUPPORT SERVICES:

GAPPT staff will be available at the registration desk for attendee questions or concerns during the event dates. For assistance before or after the event, attendees may contact [info@gappt.org](mailto:info@gappt.org). Inquiries will be responded to within 24 hours during regular business hours.

## TRANSCRIPTS:

Earned GAPPT CECs and IACET CEUs will be uploaded to the participant's GAPPT profile within 14 days of the event's conclusion. Members may view and download a copy of their transcript through the GAPPT website at [www.gappt.org](http://www.gappt.org).

## ATTENDEE LIST:

The initial attendee list will only be available through the registrant webpage on August 27, 2025. Participants should refer to GAPPT|ACCESS for the most up-to-date list of attendees. **Additional lists on demand will not be provided.** The final attendee list will be available in the website's "Archived Event" section on October 10, 2025.

## PARKING:

Complimentary parking has been arranged for attendees at the Macon Marriott City Center. Additional parking is available at the Edgar H. Wilson Convention Center for those who be driving in.

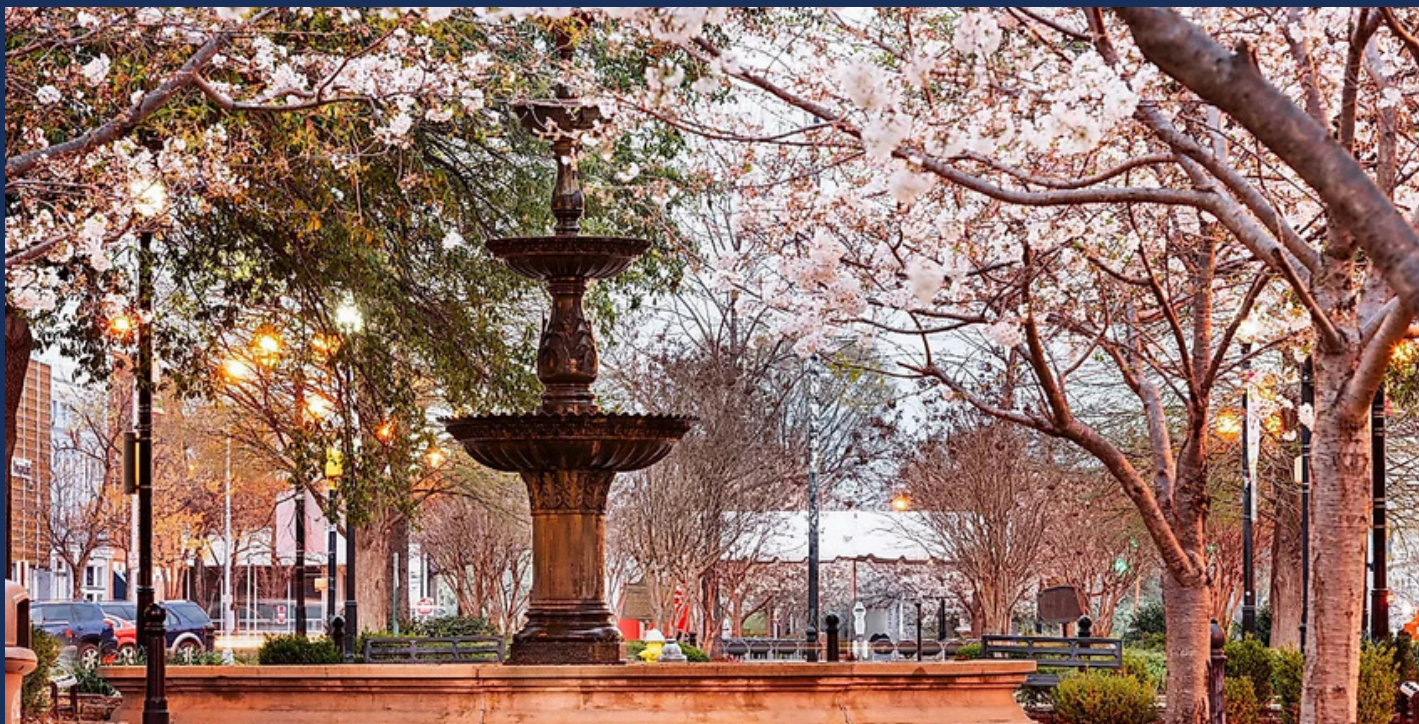
## REGISTRANT WEBPAGE AND EVENT APP:

A webpage for event registrants only will be available on **August 27, 2025**. This webpage will contain event information, including special reminders, a program preview, and the attendee list. GAPPT|ACCESS, our event app, will be available on September 3, 2025.





For inquiries about the GAPPT Eleventh Annual  
Trustee School, please contact us.



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