

Twelfth Annual Trustee School



September 28 - 30, 2026

The Classic Center | Athens, Georgia

SPONSOR PROSPECTUS



Certified Retirement Plan Fiduciary™ | CRPF™
Defined Contribution Plan Fiduciary™ | DCPF™

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 Twelfth Annual Trustee School will offer the Certified Retirement Plan Fiduciary™ program, the new Defined Contribution Plan Fiduciary™ program 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 a Certified Retirement Plan Fiduciary™ Course, the Defined Contribution Plan Fiduciary™ Course, or the 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 By September 3rd!

Plan Sponsor Members \$189.00

Affiliate Members \$750.00

Guests \$129.00

Please visit www.gappt.org for information about non-member rates and guest qualifications.
Beginning September 4, 2026, rates will be \$219.00 for Plan Sponsors, \$850.00 for Affiliates, and \$159.00 for guests.



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.



ANTICIPATED AGENDA

Monday, September 28, 2026

7:00 AM:	Registration Opens
7:15 AM - 8:15 AM:	Networking Breakfast
8:15 AM - 9:20 AM:	General Session (All Courses)
9:20 AM - 9:35 AM:	Morning Break
9:35 AM - 9:50 AM:	CRPF™ Course Intro Sessions
9:50 AM - 10:40 AM:	Breakout Sessions (CRPF™ and CE)
10:50 AM - 11:40 AM:	Breakout Sessions (CRPF™ and CE)
11:40 AM - 12:35 PM:	Networking Lunch
12:40 PM - 1:30 PM:	Breakout Sessions (CRPF™ and CE)
1:40 PM - 2:30 PM:	Breakout Sessions (CRPF™ and CE)
2:30 PM - 2:50 PM:	Afternoon Break
2:50 PM - 3:40 PM:	Breakout Sessions (CRPF™ and CE)
3:50 PM - 4:40 PM:	Review Sessions (CRPF™) Breakout Session (CE)
4:45 PM - 6:00 PM:	Networking Reception
6:00 PM:	Dinner and Evening on Your Own

Tuesday, September 29, 2026

7:30 AM:	Registration Opens
7:30 AM - 8:40 AM:	Networking Breakfast
8:25 AM - 8:40 AM:	DCPF™ Course Intro Session
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™ and DCPF™) Breakout Session (CE)
4:45 PM - 6:00 PM:	Networking Reception
6:00 PM:	Dinner and Evening on Your Own

Wednesday, September 30, 2026

7:30 AM:	Continental Breakfast Available
8:00 AM - 9:30 AM:	CRPF™ and DCPF™ Examinations

NOTE: The DCPF™ Course sessions will be held on Tuesday, September 29, 2026. DCPF™ Course registrants are encouraged to attend the CE sessions on Monday, September 28, 2026 to maximize their continuing education hours.



All educational sessions, meals, and receptions will take place at the Classic Center.



Hyatt Place Athens | Downtown

There's no cooler city to explore than Athens, home of the University of Georgia. Athens is teeming with local boutiques, craft breweries, historic landmarks, and a lively music scene.



The group rate is \$179.00 plus tax per night and is available until August 26, 2026 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 Hyatt Place | Athens Downtown is located at 412 North Thomas Street, Athens, Georgia 30601, and is easily accessible by car. The hotel is approximately 82 miles from Hartsfield-Jackson Atlanta International Airport. Flights into the area's regional airports may be available.



TRUSTEE SCHOOL SPONSORSHIP OPPORTUNITIES



Why Sponsor

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

PLATINUM LEVEL

\$3,000.00

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 Four Trustee School Course Books and in the GAPPT Newsletter

Acknowledgment in the Online "Monthly Memo"

GAPPT LinkedIn Post

Recognition and Signage at Your Preferred Trustee School Networking Event

Attendee List with Contact Information

GOLD LEVEL

\$2,200.00

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 Four Trustee School Course Books and in the GAPPT Newsletter

Acknowledgment in the Online "Monthly Memo"

GAPPT LinkedIn Post

Attendee List with Contact Information

SILVER LEVEL

\$1,500.00

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"

GAPPT LinkedIn Post

Attendee List with Contact Information

Trustee School 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 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 31, 2026:** Firm Information Due
Sponsor Invoices Due
Program Ad Due (*Platinum/Gold Only*)
- September 4, 2026:** Late Registration Begins
- September 14, 2026:** Event App Publication
- October 8, 2026:** Newsletter Ad Due (*Platinum/Gold Only*)
- November 1, 2026:** Fourth Quarter Newsletter Publication

MATERIAL SUBMISSION:

All material is submitted during the Trustee School registration process. **Information received after August 31, 2026, deadline is not guaranteed for inclusion.**

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

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

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 it 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 emails three weeks before the Trustee School on September 9, 2026. A final attendee list will be emailed on October 7, 2026. **Additional lists on demand will not be provided.**

SPONSOR SUPPORT:

Before the Trustee School dates, please contact Sue Reynolds at 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 an actuarial, consulting, custodial, legal, plan administration, or investment management firm cannot be considered a guest. All guests must be registered and wear their name badges. 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 September 3, 2026. Attendees may register after this date, but higher fees will apply.

REFUNDS:

To receive a refund, a notification must be received on or before September 3, 2026, and will be subject to a \$25.00 processing fee. **No refunds will be given for cancellations received on or after September 4, 2026.**

CERTIFIED RETIREMENT PLAN FIDUCIARY™ (CRPF™) PROGRAM:

Our flagship certification program for trustees and staff members was 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.

CERTIFIED DEFINED CONTRIBUTION FIDUCIARY™ (DCPF™) PROGRAM:

This one-and-a-half-day certification program provides comprehensive education for those administering public-sector defined contribution plans, such as 401(a), 457, or 403(b) plans.

PREREQUISITES:

There are no prerequisites to register for the CRPF™ Basic Course, DCPF™ Course, or the Continuing Education Course. Successful completion of the CRPF™ Basic Course is required to register for the CRPF™ Advanced Course. CRPF™ and DCPF™ Course participants must attend all their course sessions to qualify for the examination.

EQUIPMENT REQUIREMENTS:

The GAPPT provides the following:

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

DCPF™ 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, tablet, or smartphone to use 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 before September 3, 2026.

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™ and DCPF™ Course presentations are included in their Course Books. Continuing Education Course presentations (if provided) are included on the event app.

CRPF™ and DCPF™ COURSE

EXAMINATIONS:

A fifty (50) question assessment consisting of multiple-choice or true-false questions is required for CRPF™ and DCPF™ Course attendees. Participants must score 70% or higher to pass the examination. Exams, scantron sheets, and pencils are provided.

CONTINUING EDUCATION COURSE

ASSESSMENT:

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

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.

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.

NASBA CPE CREDITS:

To earn NASBA CPE credits, participants must have their name badge scanned upon entering and scanned again within 10 minutes of the session ending. The Trustee School's delivery method is Group Live. No advanced preparation is required for the CRPF™ Courses, DCPF™ Course, 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 questions, please contact info@gappt.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™ and DCPF™

COURSE COMPLETION AND CERTIFICATES:

On October 16, 2026, CRPF™ and DCPF™ participants will be notified via email whether they successfully completed their course. Notification is either a "pass" or "fail." Exam scores will be released upon an 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 a CRPF™ Course or the DCPF™ 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 Trustee School 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. Inquiries will be responded to within 24 hours during regular business hours.

TRANSCRIPTS:

Earned GAPPT CECs, IACET CEUs, and NASBA CPEs 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.

ATTENDEE LIST:

The initial attendee list will only be available through the registrant webpage on September 9, 2026. 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 19, 2026.

PARKING:

Overnight parking is available to Hyatt Place guests for \$12.00 per night. Paid parking is available at the Classic Center.

REGISTRANT WEBPAGE AND EVENT APP:

A webpage for event registrants only will be available on **September 9, 2026**. 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 19, 2026.



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



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