

Overview

Certified PA Public Retirement Plan Professional

An educational certification opportunity for public pension trustees, pension administrators and staff, and industry professionals



Program Goals & Objectives

- *To provide an educational setting that is conducive to developing well informed public pension trustees, pension administrators and staff, as well as industry professionals who work closely with pension systems*
- *To provide an educational setting that enables participants to be actively and meaningfully involved in the management of the pension plans they represent*
- *To provide an educational setting to prepare participants to meet the standards their fiduciary role demands upon acceptance of their position with a pension system*
- *To develop a standard of education and industry competency so that each individual working with a retirement system in their capacity protects the retirement security of the Pennsylvania public pension plan beneficiaries*



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Course Design

The certification program provides participants with exposure to a diverse and comprehensive curriculum of pension topics in a three-part process:

- **On-line introductory education modules develop by Fi360, Inc.**
 - *The Role of the Retirement Plan Fiduciary*
 - *Creating a Comprehensive Fiduciary Process – Parts 1 & 2*
- **Attendance at PAPERS conferences**
- **Continuing Education** – additional on-line education modules; on-line library resources

Program Enrollment

Please visit the PAPERS website www.papers.org to access the certification program application form. A link to this printable form may be found on the “Certification Program” page.

Submit the completed form either by mail or e-mail. See details below under “Program Cost” for more information about submitting the application and required payment.

Program Cost

The one-time enrollment fee of \$499 is payable by three methods:

1. **To pay by check.** Please make check payable to: **PAPERS** and return with application to: **PAPERS, P.O. Box 61543, Harrisburg, PA 17106-1543**
2. **To pay by credit card or PayPal.** Please access the PAPERS website www.papers.org and click on “Certification Program”. Near the bottom of this page click on the drop down box and follow the directions to pay the registration fee. If a

completed application has not already been submitted, please do so either by mail to: **PAPERS, PO Box 61543, Harrisburg, PA 17106-1543** or scanned, saved and e-mailed to: douglas.b@verizon.net.

3. **To pay by ACH transfer.** Please contact PAPERS by e-mail douglas.b@verizon.net to request the bank account and routing information you’ll need to pay by this method. If you require a signed form to initiate the ACH transaction, please send the form to this e-mail address and it will be completed/returned promptly. Then, submit your completed membership application as note in #2 above so it can be matched with the ACH payment.

Process

After submitting a course enrollment form and payment of the one-time fee, individuals will receive an authorization code giving access to the on-line modules. Modules may be taken at one’s leisure to be completed within six months of enrollment.

At the conclusion of each module, participants will take an on-line test to check their understanding of the material. The test may be re-taken any number of times until a passing grade is received.

Participants will receive written notification upon successful completion of the three on-line modules. The next step in the certification process is attendance at three of the next four PAPERS conferences (held each spring and fall). After attending the required number of conferences, participants will be awarded the *Certified PA Public Retirement Plan Professional* designation. Public recognition of this achievement will be provided at PAPERS conferences, on the website and in newsletters.

Continuing education will be required to maintain this designation.