

PAPERS CPPT Program

Certified Public Pension Trustee Program

AN EDUCATIONAL CERTIFICATION OPPORTUNITY FOR PUBLIC PENSION TRUSTEES, PENSION ADMINISTRATORS AND STAFF, AND INDUSTRY PROFESSIONALS



Leadership in Public Pension Education

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 to their position involved with a pension system.
- To develop a standard of education and industry competency so that each individual working with the retirement system in their capacity protects the retirement security for the public pension plan beneficiaries in Pennsylvania.



Pennsylvania Association of the Public Employee Retirement Systems
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www.pa-pers.org

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Course Requirements

Following a core curriculum, the certification program requires participating in 36 hours of course credits over a three year period of time. Course credits can be attained by attending the Spring Forum, the Fall Workshop, PAPERS Online Sessions, or some combination of the three. Participants must successfully pass an exam following each educational offering. Upon course completion, the participant will be awarded the Pennsylvania Certified Public Pension Trustee designation.

- A minimum of 18 hours must be obtained by attending course offerings at the PAPERS Annual Spring Forum.
- Up to 18 hours may be obtained by attending the PAPERS Annual Fall Workshop
- The PAPERS Online Program are meant to supplement missed credits throughout the program. Participants can earn up to 8 credits per year and a maximum of 18 credits through the duration of the CPPT program.

Acquiring Credits

CPPT Participants gain credits by attending the various educational offerings by PAPERS. PAPERS hosts a Spring Forum, a Fall Workshop, and Online Program Sessions. After each educational program participants must successfully pass a certification exam.

Spring Forum - Potential to earn up to 12 credits at a single forum with successful completion of a follow up certification exam

Fall Workshop - Potential to earn up to 10 credits at a single workshop with successful completion of a follow up certification exam

PAPERS Online Program - You can earn a single credit by participating in an online session and successfully completing a follow up certification exam. There will be eight online sessions per year allowing participants to earn up to 8 credits per year. Please note that a participant is limited to earning a maximum of 18 credits through the online program.

Certification Testing

There will be a multiple choice certification exam after each educational offering. Testing is done online and graded on a pass/fail system. A passing grade is defined as 70% correct answers. You must successfully pass the certification exam within two weeks following the educational offering in order to obtain the projected credits for that event.

Curriculum

PAPERS has many relationships with leaders in all facets of the industry who offer their knowledge and expertise. These professionals are well qualified to instruct the PAPERS membership in an educational setting. The PAPERS CPPT Program will cover a well balanced curriculum with a focus on the following areas:

- Asset Allocation & Investment Strategies
- Communications & Media Programs
- Fiduciary & Compliance Standards
- Legal Issues/Board Policies & Practices
- Pension Fundamentals
- Pension Funding & Plan Design
- Public Pension Industry Trends & Issues

Program Cost & Duration

Total CPPT Program - \$300

Annual Post-Certification Fee - \$30

The program must be completed in a three year time frame. In order to retain the CPPT designation, participants must attend either the Spring Forum and/or the Fall Workshop at least once a year. There is a \$30 annual post-certification fee in addition to any conference registration fees.

Program Registration

Please visit the PAPERS website (www.pa-pers.org) and follow instructions provided on the PAPERS CPPT registration form. You may then email or mail the completed form to Sean McKinstry.

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