

# 2024 GAPPT ANNUAL REPORT



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MAKING A DIFFERENCE



## 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 2024, the GAPPT Board of Directors and Committee Chairs set strategic goals centered around expanding membership and enhancing member engagement. A key focus was on targeting Defined Contribution (DC) plans within Georgia, as well as those in surrounding states that may not have access to trustee education programs. Additionally, goals were set to drive greater member involvement through participation in Committees.

To support these initiatives, GAPPT implemented targeted marketing efforts aimed at key decision-makers across the region. This included attending conferences and events to raise awareness about GAPPT's offerings and opportunities. The organization also introduced new initiatives to recognize members who had earned or were in the process of earning, the CRPF™ designation.

To ensure the organization's efforts were aligned with the needs of its members, the evaluation process was expanded to gather more insightful feedback on what matters most to the membership. Communications were also enhanced to share information about GAPPT's Standing Committees and their important work, encouraging greater participation.

In celebration of GAPPT's Fifteenth Anniversary, the organization took the opportunity to give back to the community, marking the milestone with contributions to support the local community.

## Looking Back at 2024...

### MEMBERSHIP



**63**

Plans



**117**

New Plan Sponsor  
& Affiliate  
members



**8%**

increase in  
membership

### EVENTS



**91**

Presenters



**63**

Sessions



**626**

Registrants



**2**

Educational  
Events

### EDUCATION



**3,619**

GAPPT CECs Earned



**256.1**

IACET CEUs Earned  
(2,727 Hours)

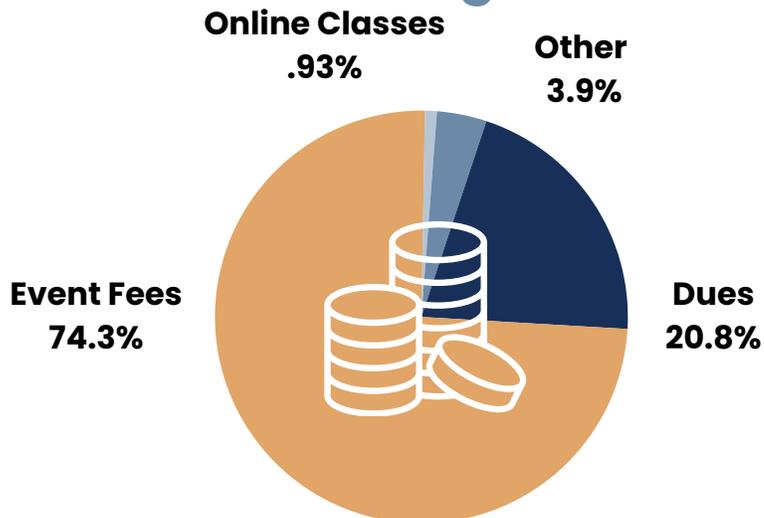


**34**

New CRPF™  
Designees

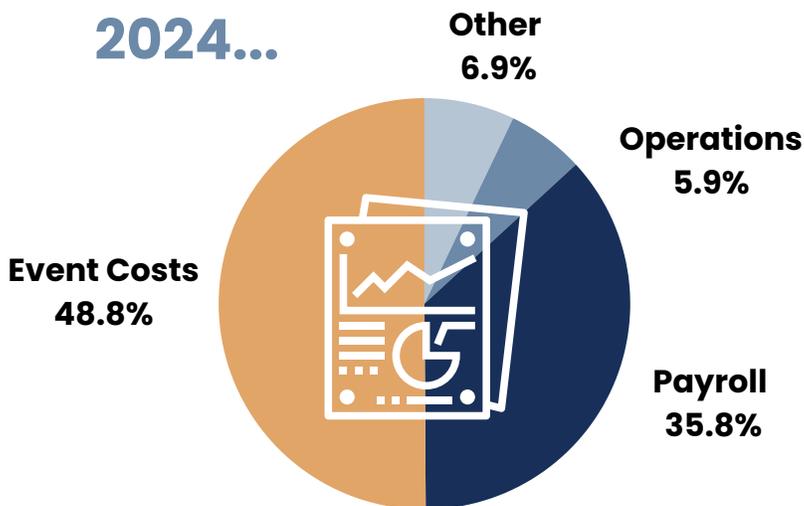
# FINANCIALS

## Sources of Funding...



## Annual Expenses

2024...



## Additional Remarks

### MEMBER DUES

**429** Plan Sponsor Members

**208** Affiliate Members

**4** Emeritus Members

### EVENT FEES

2024 events included the Fifteenth Annual Conference, GAPPT Night with the Atlanta Braves, and the Tenth Annual Trustee School.

### SPONSORSHIPS

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



# EDUCATION

## Noteworthy in 2024

### **GAPPT CECs and IACET CEUs**

In 2024, the number of GAPPT continuing education credits earned was just over 3,600 and the number of IACET CEUs earned was just over 255.

### **Double the CRPF™ designees**

In 2024, the number of individuals earning their CRPF™ increased by 50% from 2023. With 34 individuals completing and passing the Advanced Course.

### **GAPPT Online Education**

Interest in online sessions continued to meet the demand of our members in 2024. Overall, 40 CECs were earned through the GAPPT|CLASSROOM.

## 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™".



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.



# 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**

Frederick Bailey, CRPF™

### **TREASURER**

David Harris, CRPF™

### **DIRECTOR AT LARGE – Position 1**

Matt Hamby, CRPF™

### **DIRECTOR AT LARGE – Position 2**

David Ward, CRPF™

### **DIRECTOR AT LARGE – Position 3**

Keisha Register, CRPF™

### **DIRECTOR AT LARGE – Position 4**

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