

*Pension Resource Center*

**TRUSTEE CONFERENCE REGISTRATION, TRAVEL,  
AND EXPENSE REIMBURSEMENT PROCEDURES**

Accommodating the different preferences and travel schedules for Trustees presents a challenge, particularly since the administrator lacks the resources of a travel agent. The Pension Resource Center therefore suggests the following guidelines for travel by Trustees and others on behalf of the plan. Please note that we implemented these guidelines for the Trustees of the plans that we administer. Your Board may have adopted additional guidelines, forms, requirements for advance approval, or other procedures prior to any travel. We would also encourage the Trustees to engage the services of a regular travel agent to satisfy particularly difficult preferences or travel requests.

***Conference Registration Procedures:***

Trustees should forward the details or completed registration form to the appropriate administrative staff, allowing sufficient time to allow for registration and payment of fees in advance of the conference date. We will forward the registration information along with the payment to the conference on behalf of the Trustee.

***Travel Arrangements:***

- **Flight Arrangements:** Due to the many possible flight arrangements, airlines, and travel preferences, Trustees should arrange their own flights. Upon receipt of the information along with the appropriate documentation of the expenses, the administrator will arrange for immediate reimbursement to the Trustee.
- **Hotel Reservations:** We find considerable variation in the preferences among our Trustees for room locations, arrangements, specific bed types, arrival and departure times. Each Trustee should therefore make his or her own reservation for a room at the conference and obtain a confirmation number. Upon receipt of the confirmation number and the total cost for the room, the administrator will forward payment to the hotel in advance of the conference along with a copy of the tax-exempt certificate. To complete the payment, we will also need the full name, address, and phone number for the hotel when we overnight a check for payment. Sometimes the rooms allotted to a conference at a particular hotel will fill up quickly; we therefore recommend that Trustees reserve their hotel rooms as early as possible.
- **Rental Cars:** The administrator will reimburse the rental car expenses from the plan upon receipt of the documentation of the expense. We advise the Trustees to include the additional property and liability insurance offered by the rental car company when traveling on behalf of the plan.

### ***Per Diem Reimbursement:***

Trustees can receive reimbursement for per-diem expenses in advance or following return from travel on behalf of the plan. The administrator will typically need the following details to provide the appropriate reimbursement.

- **Meals:** Trustees should provide the administrator with the estimated date and time of departure, along with the estimated date and time for return. The administrator will then determine the appropriate per-diem allowance and arrange for reimbursement either in advance or after the Trustee completes the travel. Alternatively, the Trustees can save and submit receipts for actual expenses for meals.
- **Mileage:** Trustees driving to conferences can estimate mileage in advance using any online map utility, such as Google, MapQuest, Yahoo, Rand McNally, and others. Trustees can also document the mileage at the actual time of travel. Most plans will reimburse driving related expenses at the standard federal mileage reimburse rate currently in effect at the time of travel. Upon receipt of the appropriate documentation or details, the administrator will arrange for reimbursement either in advance or after the Trustee completes the travel.

### ***Additional Resources:***

Trustees should always carry the tax-exempt certificate for the plan when traveling. In particular, the hotels are notorious for charging taxes on rooms even when provided with the appropriate documentation. The administrator always provides a copy of the tax-exempt certificate to the hotel when making a payment for a room as well.

Trustees can obtain additional information related to travel on the website maintained for each Plan. The administrator created a separate section under each plan web page which includes copies of Board policies, tax-exempt forms, forms to submit for reimbursement if available for your plan, and other useful links. Please visit your plan website at [www.ResourceCenters.com](http://www.ResourceCenters.com).

Please address all correspondence relating to travel and reimbursement requests as follows:

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