

**Mandatory Bonding Application**  
**FYE July 1, 2018 – June 30, 2019**

**TO BE FILED WITH THE TRTA OFFICE ON OR BEFORE AUGUST 1, 2018**

District Number \_\_\_\_\_

Local Unit Name and Number \_\_\_\_\_

TRTA provides bonding for District and Local Boards at no cost to the district or local unit. The full premium is paid by TRTA. Six (6) positions of each district or local unit are covered by the policy.

Please provide the list of up to six elected/approved or board approved positions that will be bonded:

- |          |          |
|----------|----------|
| 1. _____ | 2. _____ |
| 3. _____ | 4. _____ |
| 5. _____ | 6. _____ |

The bond covers the position, not the individual; if there is a change of officers, the new officers are covered.

The bond could cover losses up to \$10,000\* for any one occurrence with a \$250 deductible. Participation is **mandatory if all conditions are met**. \*Districts and local units with over \$10,000 of assets please check here \_\_\_\_\_.

Acknowledgement of mandatory conditions:

Official Name and location/address/email (where bank statement is mailed/emailed) of each District/Local Unit:

\_\_\_\_\_  
\_\_\_\_\_

Two Signatures are preferred on all checks: Yes \_\_\_\_\_ No \_\_\_\_\_

Bank statements are reconciled regularly by treasurer or other authorized member preferably who is not a check signor on the accounts: Yes \_\_\_\_\_ No \_\_\_\_\_

A mandatory annual audit of the books is performed: Yes \_\_\_\_\_ No \_\_\_\_\_

**If any of the above conditions are answered "No", you may not be eligible for bonding coverage.**

The above information is submitted by:

Printed Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

**UPON COMPLETION OF THIS FORM, SEND FORM TO:**

Mail: Rosalind Johnson, Deputy Director  
Texas Retired Teachers Association  
313 E. 12th St., Suite 200  
Austin, TX 78701  
Fax: 1.512.476.1003  
Email: [rosalind@trta.org](mailto:rosalind@trta.org)