

Mandatory Bonding Application

FYE July 1, 2022 – June 30, 2023

TO BE FILED WITH THE TRTA OFFICE ON OR BEFORE AUGUST 1, 2022

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