

Trustee Travel Procedure

Making Travel Easy: Step-by-Step Guide

The Resource Centers strives to make travel arrangements for trustees simple and efficient. Here's an overview of the travel process and responsibilities for conferences or other board-related travel:

Step 1: Notify Our Office



- **Action:** Inform us of your intent to attend a conference or travel.
 - **How:** Send an email to Conference@ResourceCenters.com with the following details:
 - Plan Name
 - Trustee Name
 - Expected Travel Dates (Departure and Return)
 - **FPPTA Conferences and Trustee Schools**
 - Spouse or Guest
 - CPPT Registration or Course Level (Basic, Intermediate, Advanced)
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Step 2: Conference Registration



- **Our Role:** We will register you for the conference and pay the registration fee in advance.
 - **You Receive:** A confirmation email from the conference with details, including:
 - Hotel booking link
 - Contact information
 - Conference discount code for hotel rooms
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Step 3: Hotel Reservations



- **Your Responsibility:** Book your own hotel room using the provided link or information.
 - **Why:** This allows you to select accommodations based on your preferences.
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Step 4: Travel Arrangements



- **Your Responsibility:** Make your own air travel and/or car rental reservations.
 - **Why:** This ensures flexibility with airports, travel times, and preferences.
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Step 5: Submit Expense Reimbursement Requests



- **Before Travel:**

1. Forward your hotel confirmation with total cost and travel reservations to Conference@ResourceCenters.com.
2. Submit an expense reimbursement form for mileage and per diem (meal allowances). Advance reimbursements for meals and mileage will be issued prior to travel.
3. **Our Role:** We will prepay the hotel and issue you an advance for expenses.

- **After Travel:**

Submit an additional expense reimbursement request for any other out-of-pocket expenses incurred during the trip, such as resort fees, parking, tolls, or gratuities.

Centralized Travel Communication: All travel-related communication should go through our designated email:

Conference@ResourceCenters.com

Remember to include your name and the plan name in your email.

Tax Exempt Certificate: We recommend that you carry a copy of the city or plan tax exempt certificate with you for all board related travel. You can also find a copy of the tax-exempt certificate online under the trustee section of your plan webpage at www.ResourceCenters.com.