

RITA’s membership calendar runs from January 1 – December 31. RITA encourages those that are directly or indirectly engaged in the self-directed retirement or financial services industry, including service providers, to become a member.

RITA membership will provide you with the resources you need to move your company forward. All membership categories receive these exclusive value-added benefits:

- Company listing in RITA’s online Member Directory (with links to your company website and social media sites)
- Member-only access to RITA’s website
- Use of the RITA-designed membership credential for the appropriate member category
- Industry updates, alerts and breaking news on regulatory, compliance and other timely issues
- Access to industry best practices
- Invitations to RITA-sponsored webinars
- Ability to participate on RITA committees – Compliance, Operations, Legislative Relations, etc.
- Discounted conference registration rate
- Access to any member-only sessions at RITA conferences for Full and Associate Members
- Discounted RITA Institute rates for furthering education and professional development



**Questions?**

Retirement Industry Trust Association  
Mike Posey, Membership Director  
Phone: 512.826.5553  
Email: [mposey@ritaus.org](mailto:mposey@ritaus.org)

**FULL MEMBER**

The **Full Member** category is open to state or federally-chartered trust companies and banks that are primarily engaged in the administration of self-directed retirement accounts, and are regulated by state or federal banking authorities.

**Full Members:**

- Have full voting rights.
- Pay annual membership dues of **\$600**; billed in January.
- May attend any closed-member meeting sessions at conferences.
- Should use “**Member**” in any forward-facing marketing materials, websites, etc. that reference RITA membership.
- Pay annual assessment fees based on total assets held, as follows:

Total Assets	Full Member Annual Assessment Fee*	Associate Member Annual Assessment Fee*
First-year member	\$ 1,500	\$ 750
\$0 - \$250M	\$ 1,500	\$ 750
>\$250M - \$500M	\$ 3,000	\$ 1,500
>\$500M - \$750M	\$ 4,500	\$ 2,250
>\$750M - \$1.0B	\$ 7,500	\$ 3,750
>\$1.0B - \$1.5B	\$10,000	\$ 5,000
>\$1.5B - \$2.0B	\$15,000	\$ 7,500
>\$2.0B - \$4.0B	\$20,000	\$ 10,000
>\$4.0B - \$6.0B	\$25,000	\$ 12,500
> \$6.0B	\$30,000	\$ 15,000

\* Subject to board’s annual review and determination; annual assessment fees may be adjusted based on the association’s budget and strategic plans.

**(Note: To avoid double-charging custodians for the same assets, assessment fees are reduced by the total assets of affiliated TPA(s), if the TPAs are also RITA members.)**

## ASSOCIATE MEMBER

The **Associate** membership category is open to third party administrators (TPAs), entities shown on the IRS list of "Approved Nonbank Trustees and Custodians", brokerage/clearing firms, depositories and others that are engaged in the administration of self-directed retirement accounts or safekeeping of retirement assets. An Associate Member may or may not be regulated.

### Associate Members:

- Have voting rights equal to one-half vote per Associate Member.
- Pay annual membership dues of **\$300**; billed in January.
- Pay annual assessment fees based on total assets held at one-half of the Member rate, as outlined in the table above.
- If both a TPA and its custodian join as RITA members, the assessment fees charged to the custodian would be reduced by the total assets of its affiliated TPA(s) to avoid double-charging the custodian for the same assets.
- May attend any closed-member meeting sessions at conferences.
- Should use "**Associate Member**" in any forward-facing marketing materials, websites, etc. that reference RITA membership.

## SERVICE MEMBER

This membership category is open to a wide variety of individuals and companies that provide ancillary services or non-investment products to the self-directed retirement or financial services industry. It also is open to those that have a

- |   |   |
|---|---|
| ➤ Broker/dealer registered representatives          | ➤ Real estate professionals   |
| ➤ Registered Investment Advisors (RIAs)             | ➤ Endowments/foundations  |
| ➤ Attorneys   | ➤ Family offices  |
| ➤ Consultants                                       | ➤ Pension fund managers   |
| ➤ CPAs or accounting professionals                  | ➤ State or federal government agencies (including regulatory and enforcement)                             |
| ➤ Due diligence firms                               | ➤ Educators from universities and colleges  |
| ➤ Valuation/appraisal professionals                 | ➤ Other associations that focus on financial, investment, savings, retirement or alternative asset issues |
| ➤ Other service or non-investment product providers |   |

general interest in expanding their knowledge of self-directed retirement accounts.

### Service

### Members:

- Pay annual membership dues of **\$1,000**; billed in January.
- Do not pay annual assessment fees.
- Do not have voting rights.
- Are eligible for sponsorship or educational speaking opportunities at RITA conferences.
- May not attend the closed-member sessions at conferences.
- Should use "**Service Member**" in any forward-facing marketing materials, websites, etc. that reference RITA membership.