

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
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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 - \$200M	\$ 1,500	\$ 750
>\$200M - \$400M	\$ 3,000	\$ 1,500
>\$400M - \$600M	\$ 4,500	\$ 2,250
>\$600M - \$800M	\$ 6,500	\$ 3,750
>\$800M - \$1B	\$ 8,000	\$ 4,000
>\$1B - \$2B	\$15,000	\$ 7,500
>\$2B - \$4B	\$20,000	\$ 10,000
>\$4B - \$6B	\$25,000	\$ 12,500
> \$6B	\$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 general interest in expanding their knowledge of self-directed retirement accounts.

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| ➤ 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 service or non-investment product providers | ➤ Other associations that focus on financial, investment, savings, retirement or alternative asset issues |

Service Members:

- Pay annual membership dues of **\$800**; 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.