

**Pennsylvania Municipalities Pension Trust
ACT 44 DISCLOSURE FORM**

The Pennsylvania Municipalities Pension Trust ("Trust") is a collection of municipal entities from throughout the Commonwealth of Pennsylvania and is the primary Contractor for the pension plan(s) offered by the Township for its employees. The Trust has entered into a number of subcontracts with firms that provide various professional services, all of which are identified below.

- 1) State the names and titles of each individual in your firm who will be providing professional services to the Trust including, if any, outside advisors or subcontractors; and describe the responsibilities of each named individual.

A. Summit Financial Corporation, a Hub International Company

- i. Joseph F. Bonasera, President*
Responsible for administrative, accounting, actuarial and investment services that Summit Financial provides to the Trust.
- ii. Jason A. Denton, Senior Retirement Consultant*
Provides actuarial services for Trust participants.

B. Nationwide Trust Company, FSB

- i. Michelle Seesholtz, Case Service Specialist – Retirement Services*
Serves as the Trust's main contact for service with Nationwide Trust Company, FSB, which maintains investment platforms offered through the Trust.

C. Pennsylvania State Association of Township Supervisors (PSATS)

- i. David M. Sanko, Executive Director*
Maintains overall management responsibility for the administrative, management and member services through the contractual relationship between PSATS and the Trust.
- ii. Bryan Jordan*
Responsible for the administrative, management and member services through the contractual relationship between PSATS and the Trust.
- iii. Scott E. Coburn, Education Director and Counsel*
Provides legal services to the Trust through the contractual relationship between PSATS and the Trust.

D. Brown, Schultz, Sheridan & Fritz

Provides annual accounting and auditing services to the Trust.

with the Trust about the award of a professional services contract, except for requests for technical clarification. *No*

9) State whether your firm, or any affiliated entity, has made a contribution within the previous two years to the Trust, or to trustee, or to any Pennsylvania municipal official, or candidate for Pennsylvania municipal office in a Pennsylvania municipality which controls the Trust. State the dates of any such contributions. *No*

10) State whether your firm, or any affiliated entity, has any direct financial commercial or business relationship with any official of the Trust or municipality, which controls the Trust. *None*

11) State whether your firm or any affiliated entity has offered or conferred a gift of more than nominal value to any official, employee, or fiduciary of the Trust or any municipality, which controls the Trust. *No*

12) State and disclose all contributions made by your firm or any affiliated entity which meet the following criteria: *See attached*

- i. The contribution was made within the last five years
- ii. The contribution was made by an officer, director, executive-level employee or owner of at least 5% of your firm or affiliated entity
- iii. The amount of the contribution was at least \$500 in a form of:
 - a) A single contribution by a person included in subparagraph ii.
 - b) The aggregate of all contributions by all persons in subparagraph ii.
- iv. The contribution was made to:
 - a) a candidate for any public office in the Commonwealth or to an individual who holds that office.
 - b) a political committee of a candidate for public office in the Commonwealth or of an individual who holds that office.

The information provided under this item shall be updated annually.

13) State the following information with respect to all persons identified as contributors in the preceding sub-paragraph: *See attached*

- Name and address of the contributor
- The contributor's relationship to your firm
- The name and office or position of each person who received a contribution
- The amount of the contribution
- The date of the contribution

The attached political contribution disclosure(s) are being made pursuant to Pennsylvania's Act 44 and on behalf of the Trustees of the Pennsylvania Municipalities Pension Trust.

Lester Houck
361 Diem Woods Dr.
New Holland, PA 17557

1.
 - Name: Keith Greiner
 - Position: PA House of Representatives
 - Amount: \$200
 - Date: 2016

2.
 - Name: Scott Martin
 - Position: PA Senator
 - Amount: \$1,250
 - Date: 2016

3.
 - Name: Craig Stedman
 - Position: Superior Court Judge
 - Amount: \$1,000
 - Date: September 20, 2017 and September 16, 2019

4.
 - Name: Scott Martin
 - Position: PA Senator
 - Amount: \$100
 - Date: May 10, 2018

5.
 - Name: Keith Greiner
 - Position: PA House of Representatives
 - Amount: \$100
 - Date: August 7, 2018

12.

- Name: Ray Agnostino
- Position: Lancaster County Commissioner
- Amount: \$200
- Date: September 9, 2020

13.

- Name: Scott Martin
- Position: PA Senator
- Amount: \$1000
- Date: October 16, 2020

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Clyde "Champ" Holman
309 Back Rd
Barnesville PA 18214

1.

- Name: Dan Meuser
- Position: U.S. Congressman
- Amount: \$500
- Date: October 9, 2020

2.

- Name: Joe Kerwin
- Position: PA House of Representatives
- Amount: \$250
- Date: October 15, 2020