



PSATS TRUSTEES INSURANCE AND RETIREMENT SERVICES

Castanea Township, Clinton County  
Susan Heaton  
347 Nittany Rd  
Lock Haven, PA 17745-4009

February 13, 2025

Dear Township Officials:

Enclosed is the 2024 Disclosure Statement of the Pennsylvania Municipalities Pension Trust (Pension Trust), as required by Chapter 7-A of Act 44 of 2009, which is also known as the Municipal Pension Plan Funding Standard and Recovery Act. This Disclosure Statement includes required annual disclosures for the Pension Trust and entities with which it has professional service contracts, including the Pennsylvania State Association of Township Supervisors, HUB International Company and Nationwide Trust Company, FSB.

Act 44 requires that the Disclosure Statement be posted on your website if you have one. You should also maintain a copy of the Disclosure Statement in your township's pension file for future reference. In accordance with Act 44 of 2009, the Pension Trust will continue to provide you with updated disclosures on an annual basis.

If you have any questions, please do not hesitate to contact me.

Sincerely,

*Stephanie L. Dobson*  
Stephanie L. Dobson

Enclosure

**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. HUB International Company*

*i. Joseph F. Bonasera, Managing Director*

Responsible for administrative, accounting, actuarial and investment services that HUB International provides to the Trust.

*ii. Jason A. Denton, Senior Retirement Consultant*

Provides actuarial services for Trust participants.

*B. Nationwide Trust Company, FSB*

*i. Anne Serrano, Senior Analyst – Client 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. Stephanie Dobson, Insurance and Pension Coordinator*

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.

*iv. Harry Krot, Trust Membership/Promotion Manager*

Promotes Trustees Insurance & Retirement Services through direct outreach and active marketing campaigns.

Pennsylvania municipal office or to the political party or political action committee of such an official or candidate. *No*

8) State whether, following the advertisement of the Request for Proposal by the Trust, your firm has caused or knowingly allowed any third party to communicate 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.

Clyde "Champ" Holman  
309 Back Road  
Barnesville, PA 18214

1.
  - Name: Dan Meuser
  - Position: U.S. Congressman
  - Amount: \$500
  - Date: October 2020
  
2.
  - Name: Tim Twardzik
  - Position: PA House of Representatives
  - Amount: \$500
  - Date: October 2020
  
3.
  - Name: Lou Barletta
  - Position: Lou for Governor
  - Amount: \$1000
  - Date: July 2021
  
4.
  - Name: Where America Starts
  - Position: PAC Schuylkill County
  - Amount: \$1000
  - Date: April 2021
  
5.
  - Name: Lou Barletta
  - Position: Governor of PA
  - Amount: \$1000
  - Date: February 2022
  
6.
  - Name: Friends of Bill Burke
  - Position: Schuylkill Co. Common Pleas Judge