




RETIREMENT BOARD POLICY AND REFERENCE MANUAL

SUBJECT: THIRD PARTY MAILINGS TO RETIREES AND BENEFICIARIES	Section: 2-20 Date Adopted/Revised: 09/10/2008
SYSTEM(S): JOINT	Approved:  Retirement Administrator

PURPOSE

The Boards acknowledge that the interests of retirees and beneficiaries may on occasion be furthered through the forwarding of relevant communications as provided by third party groups or third party organizations. To this end, the Retirement Boards established this Joint Board Policy for the control and administration of requests for third party mailings.

POLICY

It is the policy of the Retirement Boards that all third party mailings be retirement related communications. The Boards have determined that it is generally inappropriate to provide third parties with access to mailing labels. In particular, such access will not be provided to commercial enterprises or entities whose mailings are not retirement related. The Boards will not under any circumstances release the names and addresses of retirees and beneficiaries to third parties.

PROCEDURES

1. A third party who requests that communications be forwarded to retirees and beneficiaries must complete such application forms as are required by the Board(s). The third party shall submit to the Boards such information as is necessary to determine the authenticity of the organization. The third party shall bear all costs of the mailing. The third party shall provide to the Boards a copy of the material to be mailed and shall provide stamped envelopes containing the material to the Boards. Retirement staff shall add the labels and deposit the envelopes in the U.S. mail.
2. Included with the application shall be the final version of the communication to be distributed. The communication shall not thereafter be changed, altered, or modified. The Boards reserve the right to review and reject any proposed communication. Such action by the Boards shall not constitute any sponsorship or endorsement of any communication forwarded.

3. An authorized representative of the third party must execute a written agreement in which the third party agrees to indemnify the Boards from any claim, loss, or liability resulting from the mailing.
4. The Boards shall periodically review this policy and reserve the right to rescind or modify it.
5. The applicable Board shall consider any request under this policy and if appropriate, approve the request for distribution.

1. Adopted 03/10/2004
2. Annual Review, administrative changes, adopted 9/10/2008.

**INDEMNIFICATION AGREEMENT
IN FAVOR OF THE
CITY OF FRESNO RETIREMENT BOARDS**

The undersigned hereby agrees to indemnify and hold harmless the City of Fresno Retirement Boards and its present, past and future members, officers, employees, agents and attorneys from any and all claims, liabilities, expenses, losses, damages, and lawsuits arising from or related to the mailing by the Board of communications prepared.

Dated: _____
Organization: _____
By: _____
Title: _____