



UNCLAIMED PROPERTY  
PROFESSIONALS ORGANIZATION

# WELCOME TO UPPO



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Here are some of the member benefits you can look forward to:

Legislative and regulatory tracking service ▶

Jurisdiction Resource Guide ▶

Member rate for annual conference ▶

Member-only forums ▶

Eight free webinars annually and on-demand webinar archives ▶

Industry Focus Calls ▶

Visibility Opportunities for Service Providers ▶

Explore the UPPO website to find the other benefits included in UPPO membership.

# ABOUT UPPO

Welcome to the Unclaimed Property Professionals Organization (UPPO), the premier organization for unclaimed property holders and service providers. You can count on us to provide robust learning and networking opportunities, fulfill legislative and regulatory tracking duties, and to be your advocate.

Your UPPO membership is an investment in your company's compliance culture. Members stay up-to-date on legislative and regulatory affairs without the hassle, understand the emerging legal trends, share best practices and grow a network of knowledgeable individuals.

You are a part of a growing community of over **1,200 individuals** belonging to nearly 350 holder companies and service providers. Enjoy the community and explore the benefits.

## JOIN UPPO TODAY!



**41%**

Members surveyed, that have between six to fifteen years of unclaimed property experience

## INDUSTRIES REPRESENTED:

|   |                                   |
|---|-----------------------------------|
| asset recovery                                | mining                            |
| banking                                       | nonprofit                         |
| communications/<br>advertising/<br>publishing | oil and gas                       |
| education                                     | retail/gift cards                 |
| entertainment                                 | securities and transfer<br>agents |
| financial services                            | software                          |
| healthcare                                    | technology                        |
| hospitality                                   | telecommunications                |
| insurance                                     | transportation                    |
| manufacturing                                 | utilities                         |

# LEVERAGE THE KNOWLEDGE OF HUNDREDS

Membership opens the door to a community of **1,200+** unclaimed property professionals representing **more than 15 industries**, and **companies** of all sizes. Use your membership benefits to stay connected and leverage the knowledge of fellow members.



## BENEFITS



### Online, member-only forums

General, advocacy and state administrator outreach forums



### UPPO Service Provider visibility opportunities



### Find fellow members using the online Member Search and Service Provider/Vendor Directory

# DISTANCE LEARNING

Learn when you like, where you like. Enjoy on-demand education and webinars for all levels of experience, covering a wide variety of subjects – from unclaimed property basics to deep dives and hot topics.



Access the library of on-demand education



Free webinars that focus on emerging topics facing the profession



Join your peers during live, 60-minute webinars to learn about everything from best practices to industry-specific topics



Stay in-tune to what's going on by subscribing to updates of the UPPO Focus blog

## Industry Focus Calls



Visit the Events tab on [www.uppo.org](http://www.uppo.org) to register for an upcoming webinar!

Connect with and learn from fellow UPPO members during our Industry Focus Calls. The current lineup of industries includes:

- **BANKS & FINANCE**
- **OIL & GAS**
- **LIFE INSURANCE**
- **P&C INSURANCE**
- **SECURITIES**
- **SERVICE PROVIDERS & HOLDER ADVOCATES**

# PROFESSIONAL DEVELOPMENT

Members receive discounted rates to the most comprehensive unclaimed property education and networking events in the country. The curriculum provided at UPPO's events and in the Certificate Program is designed by subject-matter experts to ensure you are getting quality and up-to-date information.



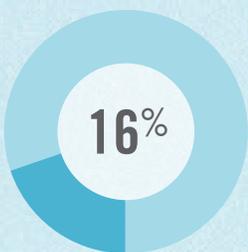
- Three and a half days of comprehensive education
- Beginner, intermediate, advanced and special focus learning tracks
- Network professionally and socially at conference events and educational sessions
- Discuss issues and common practices in industry-specific breakouts

## UPPO UNCLAIMED PROPERTY CERTIFICATE PROGRAM



- Two-tier program with basic and intermediate levels
- Educational sessions on the fundamentals and diving deeper into key topics
- Delivery: Annual Conference sessions, on-demand webinars
- Participants are tested after each session to gauge understanding
- Receive UPPO Unclaimed Property Certificate after successful completion

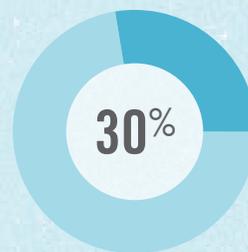
In-person events are the best way to grow your professional network. Attendees of the UPPO Annual Conference estimated how many connections they made during the event.



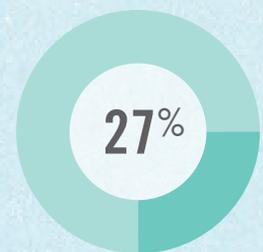
20+ Connections



10+ Connections



5+ Connections



1+ Connections

Visit the Events and Member Resources tabs on [www.uppo.org](http://www.uppo.org) to learn more!

### CONTINUING PROFESSIONAL EDUCATION

CPE credit is available at most educational opportunities.

[uppo.org](http://www.uppo.org)

## MINIMIZE RISK

We take the hassle out of legislative and regulatory tracking so it's easier than ever to stay updated and compliant.



You'll save time and stay in compliance with **govWATCH**. Every week you'll receive an email brief of legislative and regulatory matters impacting unclaimed property. In addition, you can access a wealth of information, including enacted legislation.



The **Jurisdiction Resource Guide** is a guide that includes reporting and remitting deadlines, dormancy periods by property type, exemptions, and contact information for all U.S. states, territories and Canadian provinces.

Sign in to UPPO and visit the govWATCH page to see the available resources.





## STAY CONNECTED TO UPPO



@UPPOFocus



Join the UPPO  
LinkedIn group



763.253.4340



UPPO Focus blog

[uppo.org](http://uppo.org)