



SOCIETY OF FINANCIAL EXAMINERS®

Application for the Accredited (AFE®) Designation (FINANCIAL ANALYST)

List below your name as you wish it to appear on your certificate:

I. Name _____

Home Address _____

City/State/Zip _____

Personal Phone Number _____

Personal E-Mail Address _____

Date Application Completed _____

II. Education: (Please include copies of your college transcripts with this application)

College _____

Degree _____ Major _____

AFE Requirements if not an accounting major:

Accounting Fundamentals I (3 hours) Date _____

Accounting Fundamentals II (3 hours) Date _____

Finance or Economics (3 hours) Date _____

AND

Business Law (3 hours) Date _____

OR

LOMA, CPCU, CLU Course (in lieu of Business Law) Date _____

I passed the necessary AFE courses offered by the Society.

<input type="checkbox"/>	AFE1 Life and Health Insurance Fundamentals	Date Passed _____	Score _____
<input type="checkbox"/>	AFE2 Property and Liability Insurance Fundamentals	Date Passed _____	Score _____
<input type="checkbox"/>	AFE3 Life and Health Insurance Accounting	Date Passed _____	Score _____
<input type="checkbox"/>	AFE4 Property and Liability Insurance Accounting	Date Passed _____	Score _____



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III. Employment History:

Current Employer: _____

Date of Employment: Month _____ Day _____ Year _____

Agency/Contract Firm _____

Work Address _____

City/State/Zip _____

Work Phone Number _____

Work E-Mail Address _____

Title/Positions _____

Description of Duties: Please show dates of employment, noting changes of work assignments.

(List former employment information for the past five+ years to verify continuous insurance department experience)

Mo./Day/Yr.	Employer Name	Address	Phone #	Position

IV. **Supervisor's Verification:** To be completed by one of the following: Insurance Commissioner, Deputy Commissioner, Chief Examiner, Director of Financial Institutions; Assistant Chief Examiner or Assistant Director, or Examination Contract Firm Supervisor. If more than one supervisor verification is needed to verify current and continuous employment, please provide the necessary documents.

I, (supervisor) _____, have reviewed the preceding portion

of the application of (applicant's name) _____.

The answers therein are true to the best of my knowledge and belief, and he/she has met the minimum requirement of two (2) years of *continuous, responsible insurance department examination experience as a financial analyst.*

(Signature) (Title) (Date)

(Agency/ Contract Firm) (Address)



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V. Professional References:

Name	Title	Address	Phone #
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1. _____

2. _____

3. _____

VI. Information required to mail letters of congratulations. Upon earning the AFE Designation SOFE will send a congratulatory letter and a certificate to your Chief Examiner or immediate supervisor. Please provide us with the name and complete mailing address of this individual:

Name/Designations _____

Agency/Contract Firm _____

Street Address _____

City, State, Zip _____

Also for purposes of the Congratulatory Letter, please advise us of your gender: Male Female

- I am currently a General member of the Society of Financial Examiners in good standing and hereby apply for the AFE designation.
- I am currently not a member of the Society of Financial Examiners, and I have included my General membership application with my application request for the Accredited AFE designation.

OATH REGARDING DESIGNATION

I affirm that I have read and comprehend the [Society of Financial Examiners Code of Ethical Conduct](#). I affirm under the penalties of perjury that the information, statements, attachments, and any other documents made in conjunction with this application are complete, honest and correct. As far as I am able to determine, I meet all of the requirements to apply for this designation.

I agree to abide by all procedures of the Board of Governors, the Executive Committee, and all other committees of the Society relating to this designation. I understand that I must comply with the Society’s Continuing Regulatory Education (CRE) program to achieve the necessary credit hours in order to maintain this designation. I comply and agree to pay necessary dues to sustain a membership in good standing with the Society.

I understand that if as a member I am found to have engaged in conduct involving dishonesty, fraud, deceit or misrepresentation, or any felony involving and criminal offense(s) other than civil traffic offenses, I shall be automatically expelled from the Society. If the Society finds I have caused or assisted in causing the compromise of any designation, I understand and agree that I may be held liable to the Society for any monetary losses the Society may incur as a result of the compromise.

Name (please print) Date

Signature