



SOCIETY OF FINANCIAL EXAMINERS®

August/September 2017

Week of Aug. 5 Committee Orientation

Insight

CDS Wrap up/Awards/New BOG & EC
Aug 21 Articles and information to headquarters
Aug. 28 Page Proof and Edits Completed
Sept. 1 Posted to website

September/October

September 18 Conference Call for Committee Review

Oct. 19 Executive Committee Meeting

Examiner Fall – NAIC Summer Meeting Notes

Sept 18 Articles submission completed
Sept 22 QAs submission completed
Oct. 4 Articles and QAs to headquarters
Oct 11 – Committee head approval
Oct. 13 Posted to website

November/December

Dues & CRE alerts
CDS /CFP /Sponsor dates
Dec 2-4 NAIC Fall Meeting
Honolulu, Hawaii

Insight

October 23 Issue Planning Conference Call

Nov 6 Articles/ information to headquarters
Nov 13 Page Proof and Edits Completed
Nov 17 Posted to website

Examiner Winter

December 4 Conference Call for Committee Review

Dec 4 Articles submission completed
Dec 11 QAs submission Completed
Dec 18 Posted to website

Jan/Feb-2018

Jan 19 Executive Committee Meeting
January 22 Issue Planning Conference Call
CDS Preliminary Info Mar 1 deadline
Dues/CRE

Insight

Jan 23 Articles/information to headquarters
Feb 5 Page Proof Edits Completed
Feb. 12 Posted to website

Examiner Spring

March 5 Conference Call for Committee Review

Mar 5 Articles submission completed
Mar 12 QAs submission Completed
Mar 19 Posted to website

March/April

March 24-27 NAIC Spring Meeting
Milwaukee, WI
April 12 Executive Committee Meeting
CDS Updates

Insight

April 9 Issue Planning Conference Call

Apr 16 Articles and information to headquarters
Apr 23 Page Proof Edits Completed
Apr 30 Posted to website

May/June

Examiner Summer –NAIC Spring Meeting Notes

June 4 Issue Conference Call for Committee Review

Jun 4 Articles submission completed
Jun. 11 QAs submission Completed
Jun. 18 Posted to website

July/Aug.

CDS July 15-18
Aug. 4-7 NAIC Summer Meeting
Boston, Massachusetts

SOFE PUBLICATION SUBMISSION REQUIREMENTS

Feature articles are typically 2500–4000 words and/or 2–5 pages in length.

Articles are due in final form, fact-checked and without typos, errors or other edits required.

Original article content must be submitted in **MS Word format** to sofe@sofe.org with “SOFE *Examiner*” as the email title. The following must be submitted with the article:

- A current, one paragraph biography for each author
- A completed SOFE Publication Release Form signed by each author
- Any accompanying photos and/or charts

Questions on subject matter for articles should be addressed to the Publications Committee Chair at sofe@sofe.org

SOFE PUBLICATION RELEASE FORM - AUTHOR

I, the undersigned, do hereby grant The Society of Financial Examiners (SOFE) permission to print my original article in *The Examiner* professional magazine.

Title Author(s) Email Address

The *Examiner* publication is provided for members and regulators on a quarterly basis and is available to members via the SOFE website at www.sofe.org. A limited number of hard copies may be printed for availability at various SOFE or industry events.

I certify that I am the owner and originator of the article submitted, that my sources have been appropriately credited in the article and permissions have been obtained for use of any information not originated by me in this article.

I (Author) agree that SOFE has editorial privileges to change this article for grammar, punctuation and formatting reasons. Any changes to the content or substance of the article must be discussed with the Author(s) and approved prior to publication.

I agree that I have read the information provided above in this form and will adhere to the deadlines, submission requirements and policies stated on the publications schedule and in the release form above.

Print Name

Signature

Date

Please scan and email completed release form to sofe@sofe.org (Prepare one form per author)

SOFE REPRINT PUBLICATION RELEASE FORM - PUBLISHER

I, the undersigned, do hereby grant The Society of Financial Examiners (SOFE) permission to re-print the following article in *The Examiner* professional magazine.

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Original Publication / Magazine / Journal / Newspaper

Issue and Date of Original Publication

The *Examiner* publication is provided for members and regulators on a quarterly basis and is available to members via the SOFE website at www.sofe.org. A limited number of hard copies may be printed for availability at various SOFE or industry events.

I (Publisher) acknowledge that SOFE will include a source citation indicating the original publication issue and date. If specific source citation verbiage is requested by the original publisher, I will provide this verbiage to SOFE with this release form.

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