



SOCIETY OF FINANCIAL EXAMINERS®

Late Extension Form for 2019 CRE Filing

If you have filed less than the required CRE credits for 2019 as of January 31, 2020, and have filed no extension request by that date, use this 2019 CRE Report form. The form and the \$75 fee are due by the last business day in March 2020.*

**See the annual and triennial credit requirements at the Certification Tab at www.sofe.org*

This Form May Not be Submitted After March 31, 2020.

ALL FIELDS MUST BE COMPLETED –Please PRINT Legibly or Type

PRINT Name _____

Company: _____

E-Mail address* _____

*A valid email address MUST be provided.

Your Current Designation-Check the one that applies: AFE CFE AES

COMPLIANCE DECLARATION:

A. I have completed my CRE credit report on this form.

B. I received my AFE/CFE designation in the year stated above and I will have a pro-rated (___ %) CRE requirement through 12/31 of the Reporting Year.

C. I am not in regulation.

CRE REQUIREMENTS COMPLIANCE INFORMATION -You must review and comply with the CRE requirements listed at the "Certification" page tab on the SOFE website, www.sofe.org.

REPORT OF CRE CREDIT HOURS:

Sessions must meet at least 50 minutes to receive one credit hour and 25 minutes after the hour to receive half hour credits.

The source of reported credits must be on NASBA's or SOFE's course sponsor/provider list linked on the Certification Page of SOFE's website under "Course Approval". Use the NASBA number for NASBA-approved providers not listed by name in the SOFE list. (Such as NAIC) In the unlikely event that neither the SOFE list nor the NASBA list includes the provider, you may request approval with the Provider Approval Form at the Forms tab on the SOFE website www.sofe.org

Please type or print the information required on page 2 of this form. Please use FULL DATE (month, day, and year) for dates of attendance or completion. Complete BOTH pages of this form.

NOTE- ALL LATE REPORTS ARE AUDITED. THEREFORE, SUBMIT WITH THIS FORM, THE SUPPORTING DOCUMENTATION FOR ALL CREDITS REPORTED HEREIN.

Page 2: **PRINT YOUR LAST NAME HERE:** _____

CRE CREDIT (A minimum 20 credits per year and 120 per triennial required for those in regulation)

Type of credit: Attendee, Presenter, Author or Reading Quiz	Name of Course Taken or Presented or Name of Published Article	Sponsor Number: (SOFE or NASBA)	Date(s) Attended or Date Completed	CRE Hours Put ** next to IT Course Credits

Total Your Credits Here:

Note- Publication Author Credit -Authorship of a technical article published in the SOFE Examiner magazine earns 6 CREs - Editor's Choice Award article earns 10 CREs). Presenter credit is twice attendee credit amount.

By signing my name below, I certify that I participated in the activity listed for the number of CRE hours claimed in accordance with the SOFE CRE Program. I also acknowledge that I will be required to submit evidentiary documents if selected for the annual CRE audits. I certify that I have read and understand the SOFE Code of Ethical Conduct and that in the year stated above, I have not been indicted, charged, arrested or convicted of any felony involving dishonesty, breach of trust or moral turpitude by a county, state, or federal body, nor have I been named or found guilty in a civil action involving financial dishonesty or breach of trust.

Signature _____ Date _____

To be a valid report, this form must be completed accurately, in full, signed, dated and submitted as specified. This form is not accepted without the \$75 late reporting and extension fee

Credit Card Company: VISA MasterCard American Express

Credit Card Number _____ Expiration Date _____

Cardholder' Name _____

Street Address: _____

Cardholder's Signature _____

TO SUBMIT-Scan and email to sofe@sofe.org Payment information must be received with form To pay by check:, Mail check with CRE Report Form to Society of Financial Examiners, 3505 Vernon Woods Dr. Summerfield, NC 27358. Mail by March 22 for on-time delivery. OR e-mail CRE Report form to sofe@sofe.org and call Rhenda Davis to pay via credit card. Payment with CRE Report is due by the last business day of March.

Questions? Contact sofe@sofe.org or call (800)787-7633