



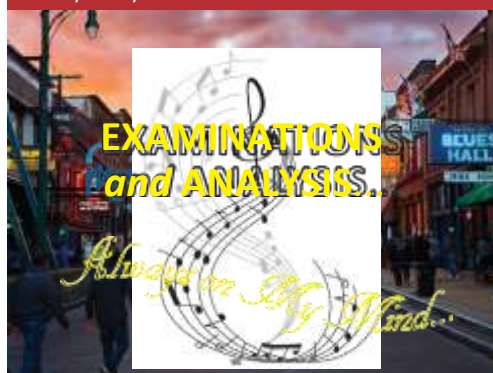
SOF

Society of Financial Examiners

INSIGHT

MAY/JUNE/JULY 2019

Volume 48 • Issue 2



**REGISTER NOW
FOR SOFE
Career Development Seminar**

JULY 21-24, 2019

Peabody Hotel | Memphis, TN

Registration Information

All registrations must be made online at www.meetingservicesinc.com/sofe. After you register, you will receive an email confirmation of your submitted registration and a payment receipt if you paid online. Register by **JUNE 21** for the best rate. For the detailed CDS brochure and to register, visit the CDS website linked to www.sofe.org.

Registration Fees

	Registration	
	By June 21	After June 21
Members of SOFE	\$625	\$725
Non-Member Examiners	\$825	\$925
Retired Members	\$345	\$445
Spouse/Guest/Youth	\$100	\$120
IT Special Session*	\$150	\$150

*Optional IT Special Session for conference registrants Wed. afternoon, July 24 - Thu. morning, July 25.

Cancellation Policy: A \$50 administration charge will be applied to all cancellations prior to July 8. For cancellations received after July 8, registration fees are subject to forfeiture.

You don't want to miss the opportunity to attend this year's Annual Career Development Seminar (CDS) in beautiful Memphis, TN.

SOF CDS offers a comprehensive array of educational sessions on the latest developments and hot topics of State-based insurance solvency regulation. Additionally, attendees will benefit from the many opportunities to network with peers during the conference and at the Sunday Night Social.

Memphis is one of the youngest towns in the South. This charming town in Tennessee has a cheerful vibe that will warm your heart and leave you wanting to stay here forever. The excellent food and soulful music of this town are also strong magnets in attracting tourists from all over the world. The town of Memphis is jolly with rays of the bright southern sun. It's a great place to spend your holidays either lazing around with great food or running to, over a score of, exciting activities and beautiful monuments.

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SOFE Important Reminders

Board of Governors Nominations

If you are interested in serving on the Board of Governors, please fill out the Self-Nomination form and submit by **MAY 22**. The Self-Nomination form can be found on the SOFE Website, in the Member's Area.

NAIC Handbook Training

It is available on the SOFE Website in the Member's Areas.

After reviewing the Handbook Update Webinars, remember to take the quiz at the SOFE testing site to get your certificate for CRE credit.

Founders Award Nomination

This is awarded every year to a SOFE Member, that is not on the Executive Committee in recognition of their dedication and service to the society. If there is a member that you believe should be nominated because of their contributions to the society, please email sofe@sofe.org with their name and a brief explanation as to why they deserve this award by **MAY 31, 2019**. The awards will be presented at this year's CDS.

State Chair Vacancies

MINNESOTA

NEVADA

NEW JERSEY

U.S. VIRGIN ISLANDS

If you would like to volunteer to be a State Chair, please contact SOFE Headquarters.

SOFE RECEPTION with Chief Financial Regulators at the NAIC National Meeting in Orlando, FL on **April 5**.



L-R: Joanne Campanelli, Treasurer
Mark Murphy, President
Jenny Jeffers, Chair of AES Committee





Committee Corner: Publications Committee

What does the Publications Committee do?

- Responsible for The Examiner professional magazine. The Examiner is published quarterly with articles on financial examination, financial analysis, IT review and other insurance industry topics. The Examiner is posted to the member's only section of the SOFE Website at <https://www.sofe.org/members-only/sofe-examiner.html>.
- Responsible for the InSIGHT newsletter. The InSIGHT is published quarterly and highlights current events at SOFE such as upcoming continuing education opportunities, reminders to SOFE membership, and announcements of new SOFE members and designees. The InSIGHT is posted to the member's only section of the SOFE website at <https://www.sofe.org/members-only/sofe-insight.html>.
- Responsible for establishing a Publications Schedule each year. The current SOFE Publications Schedule is posted to the SOFE Website at <https://www.sofe.org/resources/publications.html>
- Responsible for seeking professional, technical and informative articles for publication in The Examiner.
- Responsible for attending quarterly Publications Committee conference calls to discuss and approve articles for publication in The Examiner.
- Responsible for proofreading draft versions of The Examiner and InSIGHT prior to publication.
- Responsible for writing and proofreading CRE Reading Quiz questions for each article published in The Examiner.

What is the CRE Reading Quiz?

- An opportunity for FREE continuing regulatory education (CRE) credits!
- A quick quiz with multiple choice or True/False questions for each article published in The Examiner.
- SOFE Members can earn two (2) CRE credits for each quiz with a passing grade of 66%, and an opportunity for a total of eight (8) CRE credits each calendar year.
- Easy and free online testing on SOFE Testing Website.

Why should I write an article for The Examiner?

- Authors earn six (6) continuing regulatory education (CRE) credits for each article published.
- Authors are recognized for insurance expertise by their entire SOFE membership. For example, an article published in The Examiner is a great opportunity for SOFE CDS session presenters to highlight upcoming session topics to all SOFE membership.
- May 29, 2019 is the next deadline to submit articles for publication in the Summer 2019 issue. Please submit articles to sofe@sofe.org for consideration by the Publications Committee.

Is there a list of articles published in The Examiner?

- As a special project, the SOFE Publications Committee recently updated the Index of past articles published in The Examiner from 2002 to 2018 for historical record-keeping purposes. The Article Index is posted in the member's only section of the SOFE website at <https://www.sofe.org/members-only/sofe-examiner.html>.

2018-19 Publications Committee Members

The SOFE Publications Committee is currently composed of a group of 7 regulators and 8 contractors. Committee members must be general, accredited or certified members of SOFE in good standing.

Joanne Smith, CFE, Chair
Darin Benck, CFE
Lewis Bivona, AFE
Andy Bougie, CFE
Rich Fidei
Neal Foster, CFE
Christopher Gallo, CFE
Glenn LeGault, CFE

Fenhua Liu, CFE
Michael Morrissey, AES
Sean O'Donnell, CFE
Robin Roberts, CFE
Moshe Stempel, CFE
Philip Talerico, CFE
Tian Xiao, CFE



New Members and Designees

Welcome to the new SOFE members who were approved by the Executive Committee since our last publication of InSIGHT:

Welcome New Members!

GENERAL MEMBERS

Joyce Boucher, TX
Joe Flores, TX
Kim Hyeongwi, TN
Mary Leonard, TX
Araceli Saldana, TX
Sean Walsh, MD
Stephanie Woods, NH

Congratulations to the following members who were granted SOFE designations by the Executive Committee since our last publication of InSIGHT:

Congratulations to our New Designees!

CFE DESIGNEE

Adeola Bello, TX
Tanya Gregoire, VT
Aiden Luong, TX
Olson Levi, WI
Luke Stavenau, OH
Alexander Pirie, VA

AFE DESIGNEE

Kelsey Barlow, ID
Stephanie Woods, NH





SOFI Calendar

Please visit the live calendar on the SOFI Website at www.sofi.org/calendar/ for current updates!

< May 2019 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6 CDS Scholarship Application Deadline	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22 SOFI Board of Governors Self-Nomination Forms Due	23	24 Monthly SOFI Membership Application Due Date	25
26	27	28	29 Deadline for article Submission for Summer Bulletin	30	31 Deadline for Founder's Award Nominations	

< June 2019 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3 NAC Insurance Summit	4 NAC Insurance Summit	5 NAC Insurance Summit	6 NAC Insurance Summit	7 NAC Insurance Summit	8
9	10	11	12	13	14	15
16	17	18	19	20	21 CDS 2019 Early Registration Ends Monthly SOFI Membership Application Due Date	22
23	24	25	26	27	28	29
30						

< July 2019 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4 Independence Day	5	6
7	8	9	10	11	12	13
14	15 SOFI's Summer Examinations Published	16	17	18	19 Monthly SOFI Membership Application Due Date	20 SOFI Executive Committee Meeting
21 Career Development Seminar - Memphis, TN SOFI Board of Governors	22 Career Development Seminar - Memphis, TN	23 Career Development Seminar - Memphis, TN	24 Career Development Seminar - Memphis, TN	25	26	27
28	29	30	31			



Mark Your Calendar

Upcoming SOFE Career Development Seminars

Details as they are available at: www.sofe.org



2019 July 21–24

Memphis, Tennessee
The Peabody Memphis



2020 July 6–9

Orlando, Florida
Walt Disney World Swan Hotel



2021 July 18–21

Scottsdale, AZ
Westin Kierland



2022 July 24–27

Pittsburgh, PA
Omni William Penn



Examiner®

Authors Wanted

The Publications Committee is looking for members to write articles for the quarterly *Examiner* magazine. **Authors will receive six Continuing Regulatory Credits (CRE) for each technical article selected for publication.**

Interested authors should contact the Publications Committee Chair via sofe@sofe.org

SOFE Headquarters

3505 Vernon Woods Drive,
Summerfield, NC 27358.

Our hours of operation are
Monday-Friday 8:30am to
5:00pm EST.

Phone No. 336-365-4640