



SOFE

Society of Financial Examiners

INSIGHT

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SOFE Renewal Due By:

DECEMBER 31, 2017

Dues are conveniently paid online at www.sofe.org

Dues for 2018 are past due after **January 31, 2018**


TO PAY DUES

1. Log into the **MEMBERS ONLY AREA** line at the upper right tab of the SOFE website
2. Then select **Billing/Invoices**
3. Once you have submitted your payment information, you will receive a receipt via your e-mail address on record.

If you have forgotten your username and password, follow the instructions at the member login area.

Remember to update your profile information in the **MEMBERS ONLY AREA** including your address, phone and e-mail address so we can continue to communicate with you.

MEMBERS ONLY AREA
Member's Directory
Billing / Invoices
View CRE Credits
Report CRE Credits
Update Profile
Update Billing Information
Update Username/Password
Logout

 REMEMBER...you can earn two (2) CRE credits for reading the Examiner and answering the quiz questions.

INSIDE

- ◆ Report Your 2017 CRE Credits Online NOW
- ◆ CRE Audit
- ◆ Sponsorship Opportunities
- ◆ 2018 Career Development Seminar Update
- ◆ Call for Presentations
- ◆ New Members and Designees
- ◆ Test Updates
- ◆ The President's Corner
- ◆ State Chair Updates
- ◆ Website News
- ◆ Mark Your Calendar



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Report Your 2017 CRE Credits Online NOW

Take time to view the CRE credits you have reported and enter any missing credits by January 31, 2018.

► **Note:** Your 2017 CDS CRE credits were automatically added to your records.

HOW TO FILE

- Go to the **MEMBERS ONLY AREA**
- Select **Report CRE Credits**, fill in the information and select **Submit My Credit**.
- When complete, select **View CRE Credits**, change the start and end year to 2017 and select search. Go to the bottom of the page to view the total CRE credits recorded for 2017.

CRE Audit

All members with a designation have the possibility of being selected for the annual audit of the CRE credit hours they reported. Annual audit selections of reported CRE credit for the year are as follows:

- A random selection of 5% of all designees' reporting
- One hundred percent (100%) of all questionable, late, or incomplete reporting

The CRE credit reported by all new members of the Board of Governors is audited in their first year in office. A random selection of 20% of the other Board members' CRE reporting for the year is audited. For details on the audit process, refer to the Policy and Procedures for the Education Committee located in the Members Area.

Designees with questions about the audit may contact SOFE at sofe@sofe.org.

Sponsorship Opportunities

Full details on the sponsorship opportunities for the 2018 CDS will be posted at www.sofe.org in December. Sponsorship forms are due before the end of February.



2018 Career Development Seminar Update

SOFE's Next Career Development Seminar will take place at the **Hyatt Regency in Indian Wells, CA, JULY 15 – July 18, 2018** (Sun.-Wed.). The area of Palm Springs is made up of nine areas linked together. It offers an abundance of options for entertainment and adventure. A must see is the Living Desert Zoo and Gardens. This is no ordinary zoo experience! Feed giraffes, ride a camel, take an extensive private safari, discover an all-female ant colony of over 10,000 ants, or take in one of many live educational animal shows. You can also wander through the Living Desert's authentic replica of a northeastern African village, observe bald eagles in their natural habitat, tour an animal hospital, and hike trails designed to give you the full experience of the undisturbed Sonoran Desert nature preserve. The oasis city has become synonymous with recreational golf thanks to the award-winning and famed Indian Wells Golf Resort, the mother of all courses with 36 holes, a terrific clubhouse and impeccable landscapes. Swing by Off-road Rentals, just outside of Palm Springs proper, to take an off-roading adventure you'll never forget. Ride Honda ATVs and quads on a large, maintained course that offers all kinds of riding, from easier, flat areas to gentle hills and steep grades for the more adventurous. Taking in the entire desert landscape is a completely different experience from above. And there's more than one way to do it! Take the Palm Springs Aerial Tramway in the world's largest rotating tramcar to approximately 9,000 feet above sea level at Mt. San Jacinto State Park to take in some of the highest perches in the area. Hike, camp, or just enjoy the multitude of breathtaking views from the top. Grab a quick snack at the cafeteria or book a reservation at the restaurant for a fine dining experience with a view that's as good as the food. The Palm Springs Air Museum is dedicated to educating the public on the role that air power played in preserving American liberties and way of life. The museum features and flies aircraft from WWII, Korea and Vietnam Wars. Many of the docents are veterans and are willing to share their personal experiences on the tour. Palm Springs offers something for everyone and promises to be an amazing location for our 2018 CDS.

Further news on the 2018 CDS will appear in the February issue of inSIGHT and at www.sofe.org.



Call for Presentations

Attention Prospective CDS Presenters: Potential presenters for the 2018 CDS must complete and submit their presentation proposals online beginning January 5. Presenters are encouraged to submit their proposals early in the submission period so that they can address any questions from the CDS Program Committee in advance of the selection process. The link to the presentation submission form will be on the SOFE home page www.sofe.org. SOFE members will be encouraged to forward the Call for Presentations link to non-members when it is available.

Test Updates

AFE 2

The new AFE 2 test is available and the old test has been extended until November 30. Please check the study guides for the new materials needed to study for the new test.

AFE 3

The new AFE 3 test will be available starting November 20. Members can take either test until January 31, 2018. After January 31, 2018, the old test will be deactivated. Please check the study guides for the new material needed to study for the new test.

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

Aaron Cornwell, NE
Segun Daramola, RI
Justine Durrance, GA
Hugh Haslem, UT
Megan Hubbuch, FL
Nicholas Illuzzi, RI
Eric Konz, IA
Jessica Lynch, FL
Emmaculate Muambo, FL
Lisa Pape, NE
Andrea Rebsom, ND
Rick Rhoades, OH
Sharill Silverio, RI
TJ Smith, UT
Anestacia Swearing, FL
Mimi Yirgalem, DC

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 DESIGNEEES

Ryne Davison, MS
Nathan DeJong, NE
Jeanie Hietpas, TX
Danielle Hopp, DE
Hai H Le, MO
Mary Meaney, NY
My-Nghi Irene Tran, NY

AFE DESIGNEEES

Christine Browning, TX
Nelly Cruz, TX
John Litweiler, WI
Eddy Silva, TX
Laurence Voiculescu, CA
Dave Woytek, TX

WARNING BEWARE of Unsanctioned Test Preparation Services

Members are cautioned to refrain from falling victim to so-called test preparation services purporting to have test preparation tools based on SOFE tests. These entities do not have the necessary information or the authorization to offer preparation for SOFE tests. The only test preparation materials for SOFE tests are SOFE's Study Guides, offered at no cost and accessed via the SOFE website.



The **PRESIDENT'S** Corner

It has been a challenging year for SOFE. SOFE has changed management companies (again), held a successful Career Development Seminar (CDS), and restored its support services culture back to engaging with its membership on a more personal basis. Those are relatively short and simple sentences but the time and effort to make those things happen is anything but short and simple.

Billing of member dues, processing membership and designation applications, tracking Continuing Regulatory Education (CRE) credits and facilitating the testing program are some of the core management company functions required for SOFE to excel as a professional organization. It is not an understatement to say that SOFE's prior management company did not perform the services that are paramount for SOFE to be a successful organization.

Meeting Services, Inc. (MSI), led by Cindy (Smith) Dodson, is now the management company for SOFE with Robin Covington as Executive Director and Rhenda Davis as Membership Director. The amount of time spent on SOFE by the volunteer leadership and the amount of time spent by the management company was terribly out of balance at the beginning of this year. There were times when it seemed the volunteers were spending more time than the management company on SOFE matters. The appropriate balance is being restored.

MSI has served as the meeting planning firm for SOFE CDS for more than 18 years. This year, MSI not only performed the core CDS meeting planning functions, they also took on additional responsibilities for registration and on-site management of CDS as they were on-boarding SOFE as a management company client.

Future steps for SOFE include rebuilding the confidence of those members that experienced poor service and lack of attention as well as successfully restoring those basic functions listed above. SOFE will continue to enhance its testing program to retain and protect its credibility as a professional licensing organization and return SOFE to the financial position necessary to complete its mission successfully.

Membership should be aware that there have certainly been additional costs incurred as a result of the unsuccessful relationship with the previous management company. Their inability to perform basic functions made it necessary to outsource certain tasks and the additional costs to put on the SOFE CDS have continued to trend upward. SOFE is certainly still a financially stable organization but responsible management requires consideration of incremental increases in revenues to stabilize member services and sustain benefits into the future.

Here is a final word about the culture of engagement with membership mentioned at the beginning of his message. A SOFE Past President had given up renewing his membership because he could not get a response from our previous management company. In fact, we are aware of several members who had given up trying to renew their memberships due to frustrations with unreturned phone calls and e-mails. MSI is committed to fixing these problems by doing their job and more. Robin Covington and Rhenda Davis are striving to answer and return member phone calls and emails on the same day whenever possible. They are dedicated, full-time employees that work daily to restore the member engagement that long-time SOFE members have come to expect. If there are members that are not experiencing the customer service they expect, we would encourage communication of any such instances directly to a Management Committee member.

Jim Kattman
SOFE President



REMINDER

Please be sure to update SOFE Headquarters with changes in your contact information.



State Chair Updates

Thank you to the following new State Chairs.

Colorado | Keith Warburton, CPA, CPCU, CFE

Hawaii | Tian Xiao, CFE

Kansas | Daniel Callahan, CPA, CFE

Minnesota | Jan Moenck, CFE

Rhode Island | Louis Gabriel, Jr., CFE, CPA

There are a few states with State Chair vacancies. If you would like to volunteer to be a State Chair for Arizona, New Jersey, Wisconsin or the U.S. Virgin Island, please contact SOFE Headquarters.

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



*L to R: Robin Covington
and Rhenda Davis*

NEWS FROM THE STAFF

Your management staff will be busy processing your invoices and available for questions about your 2017 CRE credits as you start winding down the year. We are eager to assist you, so please contact us.

SOFE Headquarter Holiday Closures

November 23 & 24 | Thursday and Friday

December 22 & 25 | Friday and Monday

January 1, 2018 | Monday

As the holiday season is upon us, we find ourselves reflecting on the past year and those most important to us. We are thankful for our relationship with you and look forward to serving you in the year to come. Your management staff wishes you a very happy Holiday Season and a New Year filled with peace and prosperity.

Robin and Rhenda

Website News

Check out the new CALENDAR on the SOFE website.



SOCIETY OF FINANCIAL EXAMINERS

Site Search - Enter Keywords

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ABOUT US

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EDUCATION

CERTIFICATION

EMPLOYMENT

RESOURCES

CALENDAR

CONTACT



Mark Your Calendars Upcoming SOFE Career Development Seminars

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



2018 July 15–18
Indian Wells, California
Hyatt Regency Indian Wells



2019 July 21–24
Memphis, Tennessee
The Peabody Memphis



2020 July 19–22
Orlando, Florida
Walt Disney World Swan Hotel



2021 July 18–21
Scottsdale, AZ
Westin Kierland



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, **Tian Xiao**, via sofe@sofe.org