



SOFE

Society of Financial Examiners

# INSIGHT

## SAVE THE DATE – SOFE 2016 CDS



### “Setting the Pace”

is the theme for the 2016 Society of Financial Examiners annual Career Development Seminar, taking place at the **Indianapolis Marriott Downtown in Indianapolis, IN, July 31–August 3, 2016 (Sun.-Wed.)**

In addition to a comprehensive array of educational sessions on the latest developments, current issues and updates on the regulation of insurance companies, attendees will benefit from the many opportunities to network with peers during the conference and at the Sunday Night Social. In keeping with the **“Setting the Pace”** theme, the Sunday Night Social will be held at the exciting **Indianapolis Motor Speedway**, where participants will enjoy great views from the famous Indy Pagoda, a sumptuous buffet and special activities, including ride-alongs on the famed speedway, known historically as the “Brickyard” - the world’s largest sporting facility, with 250,000 seats.

**Immediately following the conference**, an optional IT session is offered from noon on Wednesday August 3 through noon, Thursday, August 4 at a separate fee.

Bring the family and arrive early or stay on after the conference to enjoy the unique attractions of the “Crossroads of America”: the Indy Cultural Trail, Fountain Square, City Market, and White River State Park; a 250-acre park connecting the Indianapolis Zoo, the NCAA Hall of Champions, and Victory Field baseball stadium. Museums line the Central Canal in the city, and visitors can rent bikes and boats to enjoy the sites.

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# Important Reminders

## HAVE YOU PAID YOUR SOFE 2016 MEMBERSHIP DUES? IF NOT—READ THIS!

SOFE bylaws call for suspension of members not paying dues by the end of March in the current dues year. This affects the member's SOFE designation as well. Only certified or accredited members in good standing can use the SOFE designation. 2016 Membership Dues payment information was emailed in October, November, December, and January. The \$15 late fee is now in effect for dues, but you may still pay your SOFE dues online at [www.sofe.org](http://www.sofe.org).

### HOW TO RENEW

It is very simple:

1. **Log into the Members Only** area link at the upper right tab of the SOFE website. (If you have forgotten your username or password information, follow the instructions directly under the Member login area for password or login retrieval).
2. **Click on "Renew Your Dues"**.
3. **Once you have submitted your payment information, print your online receipt** for your records or to use for reimbursement purposes.

## LATE REPORTING FOR 2015 CRE CREDITS DUE MARCH 31, 2016

CRE Reporting for 2014 was due online by January 31, 2016. Late reports are accepted until March 31, via the Late CRE Reporting Form (on SOFE home page [www.sofe.org](http://www.sofe.org)) with the late filing fee until March 31. Failure to file the required credits is grounds for SOFE designation suspension. The minimum number of CREs an examiner must earn in any one year is 20. **Effective in 2015, 2 credits in ethics must be earned every year.**

Please review the full details at the "Certification" tab at the top of the screen at [www.sofe.org](http://www.sofe.org).

## CDS SPONSORSHIP FORM DEADLINE

The Sponsorship Agreement form is due by **March 1**, for recognition in the SOFE 2015 CDS Registration Brochure and in the final program. The details and Sponsor Agreement form for the 2015 CDS Sponsorship Program are linked on SOFE home page, [www.sofe.org](http://www.sofe.org).

## CRE AUDITS

All members with a designation have the possibility of being selected for an annual audit of the CRE credit they report. 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.

Accredited and Certified members with questions about the audit may contact SOFE at [sofe@sofe.org](mailto:sofe@sofe.org).

## REVISED AFE 3 TEST

The SOFE Examinations Committee revised the AFE 3 test to reflect the material covered in the Life and Accident and Health Insurance Accounting Textbook, Fourth Edition 2001 and 2011 Addendum. The study material may be purchased at a discounted price via the Actuarial Bookstore order form on the "Testing" page of the SOFE website [www.SOFE.org](http://www.SOFE.org), or purchased through IASA. The outgoing AFE 3 test will expire **March 31, 2016**. For more information, please review the AFE requirements on the "Certification" page on the website.





# NEW AFE/CFE DESIGNEES AND NEW MEMBERS

The following designations and new memberships were approved following the last issue of *InSight*.

## Welcome New Members!

### GENERAL MEMBERS

Natalie Bowland | NE  
Christine Browning | TX  
Judy Chen | CO  
A\_Victoria Claros | MD  
Elizabeth Hagerty | PA  
Michael Lisowski | PA  
Robert McLaughlin | WI  
John Merrigan | MO  
Yulan Ou | NY  
Kimberly Pham | NE  
Ryan Roussel | GA  
Stephen Shahlari | MO  
Eddy Silva | TX  
David Woytek | TX

## Congratulations to New Designees!

### CFE DESIGNATIONS

Christine Brown | VT  
Laura Church | MO  
Chris Erwin | AR  
Colton Schulz | ND  
Sonia Thomas | NY

### AES DESIGNATIONS

Kui Cheng | TX  
Jason Tippett | MI

### AFE DESIGNATIONS

James Borrowman | UT  
Thomas Devine | NC  
Jeff Maher | AR  
Robert McLaughlin | WI  
Kelly Monaghan | PA  
Raciel Moratin | DE  
Margaret Woodsmall | AR  
Keilei Yambaw | OR





## Mark Your Calendars Upcoming SOFE Career Development Seminars

Details as they are available at: [www.sofe.org](http://www.sofe.org)



**2016 July 31–August 3**

Indianapolis, Indiana

Indianapolis Downtown Marriott



**2018 July 15–18**

Indian Wells, California

Hyatt Regency Indian Wells Resort & Spa



**2017 July 23–26**

Marco Island, Florida

JW Marriott Marco Island



**2019 July 21–24**

Memphis, Tennessee

The Peabody Memphis



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### 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](mailto:sofe@sofe.org)