



SOFE

Society of Financial Examiners

# INSIGHT

## SAVE THE DATE – SOFE 2015

CDS, Monday, July 13 – Thursday, July 16  
San Diego, CA



### “Examinations Taking Flight”

is the theme for the 2015 Society of Financial Examiners annual Career Development Seminar, taking place at the **Town and Country Resort and Convention Center in San Diego, CA.** The conference begins on Monday this year, allowing everyone extra time on the weekend to arrive and enjoy the San Diego area.

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 Monday Night Social. In keeping with the CDS theme “**Examinations Taking Flight**”, the Monday Night Social activities will be held aboard the world famous **USS Midway**—the longest serving U.S. Navy aircraft carrier of the 20th century. The **USS Midway Aircraft Carrier Museum** offers a memorable opportunity to explore this floating city at sea and its 50 years of world history. There are 60 exhibits throughout the immense vessel as well as a collection of restored aircraft onboard, dating from **World War II to Operation Desert Storm.** A catered buffet will be served on board and various activities will be offered; including **interactive exhibits, flight simulators, short films, and climb-aboard aircraft and cockpits.**

**Immediately following the conference**, an optional IT session is offered from noon on July 16, through noon, July 17 at a separate fee.

Bring the family and arrive early or stay on after the conference to enjoy the unique attractions the San Diego area offers, including the **San Diego Zoo, SeaWorld, Balboa Park, Seaport Village, the Gaslamp Quarter**, and more!

## INSIDE

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- ◆ Late Payments of 2015 Dues
- ◆ Late Reporting of CRE 2014 CRE Credits
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For further details on the program and to register, visit the CDS website linked to [www.sofe.org](http://www.sofe.org) in early April.



# Important Reminders

## SPONSORSHIP AGREEMENT FORM DEADLINE

The Sponsorship Agreement form is due by **February 23**, 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).

## HAVE YOU PAID YOUR SOFE 2015 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.

2015 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).

### 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 2014 CRE CREDITS DUE MARCH 31, 2015

CRE Reporting for 2014 was due online by January 31, 2015. **Late reports are accepted until March 31**, via the Late CRE Reporting Form 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. Please review the full details at the "**Certification**" tab at the top of the screen at [www.sofe.org](http://www.sofe.org).

## CRE AUDITS

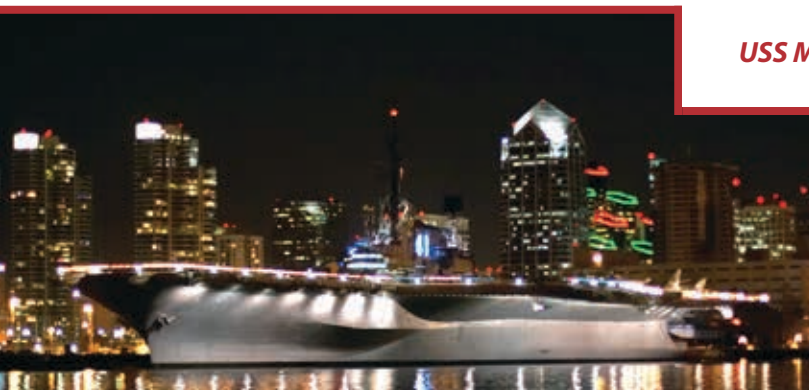
All members with a designation have the possibility of being selected for an annual audit of the CRE credit they report. Annual audit selections of reported CRE credit for the year are as follows:

- 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).

## Ethics CRE Requirement Begins in 2015

Beginning 2015, two (2) hours of the required annual CRE hours for the AFE, CFE and AES designations must be earned in ethics. Please see the details at the "**Certification**" tab at [www.sofe.org](http://www.sofe.org) under "AFE/CFE Requirements", "AES Requirements", and under "Recommended Programs and Credits".



*USS Midway*





# NEW AFE/CFE DESIGNEES AND NEW MEMBERS

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

## Congratulations to New Designees!

### CFE DESIGNATIONS

Philip Barrett | CT  
Michael Behrens | MO  
Holly Conley | DE  
Karen Gard | NY  
Keith Kleindienst | CT  
Gene Renard | WI  
Kimberly Smith | KY  
Kevin Stubbs | NE  
Teresa Trusty | UT  
Sauhung You | NY

### AFE DESIGNATIONS

Anjanette Briggs | CA  
Christopher Erwin | AR  
Temitope Nayin | TX

## Welcome New Members!

### GENERAL MEMBERS

Zachary Beck | TX  
Kimberley Boyko | CT  
Toni Charlton|Halbrook | MO  
Victoria Chi | WI  
Thomas Dudek | PA  
E\_Anders Erickson | ID  
Arthur Etherly | AR  
Peter Foley | MN  
Angela Gomez | WA  
Tanya Gregoire | VT  
Cara Kroeger | NE  
Hai Le | MO  
Wayne Longmore | NY  
Jonathan Todd Merchant | MS  
Trung Ngo | IN  
Clara Okafor | TX  
Amy Joan Orth | NE  
Ross Pedersen | NE  
Angelin Perez | NY  
Cynthia Starrett | IN  
Sharon Stuber | FL  
Philip Talerico | MD  
Theodore Tidwell | CO  
Candy R.L. Walker | VA  
John Yegerlehner | IN  
Sauhung You | NY  
Natalie Yue | TX

### Regulatory Members

Melanie Fujiwara | HI  
Ben Harris | UT  
Marc Hirai | HI  
Annette Szady | PA  
Lauren Tamanaha | HI





**SOFE**  
 Career  
 Development Seminar  
 Monday-Thursday  
 July 13-16, 2015  
 Town and Country  
 Resort Hotel  
 San Diego, CA  
**Save the Date**  
 Registration opens April 2015 @ [www.sofe.org](http://www.sofe.org)

# Save the Date

July 13-16, 2015





## Mark Your Calendars

### Upcoming SOFE Career Development Seminars



**2015** | July 13–16

Town and Country Resort Hotel  
San Diego, California



**2016** | July 31–August 3

Indianapolis Marriott Downtown  
Indianapolis, Indiana



**2017** | July 23–26

JW Marriott Marco Island  
Marco Island, Florida



**2018** | July 15–18

Hyatt Regency Indian Wells Resort & Spa  
Indian Wells, California

## Examiner<sup>®</sup>



### 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, Joseph Evans, via [sofe@sofe.org](mailto:sofe@sofe.org)