



SOFE

Society of Financial Examiners

# INSIGHT

## SOFE RENEWAL **DUE BY:**

**JANUARY 31, 2016**

Dues for 2016 must be paid in full by **January 31, 2016**

Dues are conveniently paid online at **www.sofe.org**

### TO PAY DUES

1. Log into the **Members Only** area link at the upper right tab of the SOFE website
2. Then click on **"Renew Your Dues"**
3. Once you have submitted your payment information, **print your receipt** for your records or to use for reimbursement purposes

If you have forgotten your **username and password**, follow the instructions at the **Member login** area. Please be sure to safe-list (and/or add to your contacts) **sofewebmaster@sofe.org** in order to receive a reminder of your login information, as well as your dues receipt once you pay online.

► **PLEASE: Do not create a new account, as that will not access your correct record.**

## Report Your 2015 CRE Credits Online Now

2015 CRE credits must be reported no later than **January 31, 2016**. CRE credits are reported online. You may input your CRE credits as you earn them, and your current records will be updated automatically.

**NOTE: Designation holders** must input their CRE credits in the CRE reporting area **except for credits earned at the SOFE 2015 CDS. CDS credits were automatically uploaded to the CRE records of those eligible to earn credit.**

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## CRE Credits (continued)

Also note that beginning with 2015, every designee is required to have 2 credits in ethics per year. For details see the "Certification" page of [www.sofe.org](http://www.sofe.org) for more details on all required credits.

### HOW TO FILE

- First, read the handy guide the Education Committee developed to assist you. You'll find this linked to the home page [www.sofe.org](http://www.sofe.org). Guidelines on the process are also with the online form.
- Log into the **Members Only** area of the SOFE website
- Click on the "Update Your Profile" link - Scroll down to "Current CRE Reporting Cycle Details"
- Hit the "add credits" button

File your credits **before** the deadline week so that you have sufficient time to ensure that all of your 2015 credits are reported correctly before January 31, 2016!

## CRE Audit

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

Designees with questions about the audit may contact SOFE at [sofe@sofe.org](mailto:sofe@sofe.org).

## 2016 Career Development Seminar Update



Indianapolis Motor Speedway

**SOFE's Next Career Development Seminar** will take place at the **Indianapolis Marriott Downtown in Indianapolis, IN, July 31– August 3, 2016** (Sun.– Wed.) Indianapolis, home of the **Indianapolis Motor Speedway**, offers many unique attractions and inviting opportunities to take in the sites, such as the Indy Cultural Trail, a bike-friendly path which traverses five downtown neighborhoods and attractions, including Fountain Square, the Capitol Building, 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. Further news on the 2016 CDS will appear in the February issue of *Insight* and at [www.sofe.org](http://www.sofe.org).

Mark your calendar now for **Sunday, July 31 - Wednesday, August 3.**

### ► Sponsorship Opportunities

Full details on the sponsorship opportunities for the 2016 CDS will be posted at [www.sofe.org](http://www.sofe.org) by December. **Sponsorship forms are due before the end of February.**



### Call for Presentations ◀

**Attention Prospective CDS Presenters:** Potential presenters for the 2016 CDS must complete and submit their presentation proposals online in January. 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](http://www.sofe.org). *SOFE members will be encouraged to forward the Call for Presentations link to potential speakers.*



## Updated AFE 3 Test Slated for January, 2016

The SOFE Examination Committee is revising the AFE 3 test to reflect the material covered in the Life and Accident & Health Insurance Accounting manual 8th edition, 2011 CD-ROM which updates the hard copy of the manual (4th edition, 2001). The revised AFE 3 test will be offered beginning this January. The study material may be purchased at a discounted price via the Actuarial Bookstore order form at the SOFE website "Testing" tab, or purchased through IASA. The outgoing AFE 3 test will expire in March 31, 2016. The deadline for re-takes of the old test is May 1, 2016. For more information, please review the AFE requirements at [www.sofe.org](http://www.sofe.org), at the "Certifications" tab. A blast will be sent to SOFE members to announce when the test is posted for use.

## 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 only on SOFE's website, [www.sofe.org](http://www.sofe.org) at the "Testing" tab.**

## NAIC Fall Meeting SOFE Breakfast Seminar

SOFE thanks November SOFE Breakfast Seminar sponsor, **The INS Companies**, and program presenters, Jerry Link and Barry Armstrong of INS. The program presented is "Cyber Security and Its Integration into Risk-Focused Examinations." As of this writing, the event was sold out.

## New Members and Designees

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

### Congratulations to Our New Designees!

#### CFE Designees

Nicole Brittingham | DE  
Tommy Kong | NY  
Meng Lisa Li | MO  
Sara McNeely | MO  
Wm David Phifer | AK  
Sara Jean Schumacher | AZ  
John Shofran | PA  
Jeffrey Usher | NY

#### AFE Designees

Seth Doyle | SD  
Jason Freedman | ME  
Carol C Matthews | CO  
David McElroy | TX  
Karen Murphy | VT  
Elizabeth Nielson | AZ  
Emily Pennington | MO  
Robert Rudnai | TX  
Mark Wiedeman | UT

*Welcome to the new SOFE members who were approved by the Executive Committee following our last Publication of InSIGHT:*

### Welcome New Members!

#### General Members

Vicente Aguillon | TX  
Nelly Cruz | TX  
Cynthia Davis | DE  
Renata Denis | FL  
Garrick Dodson | TX  
Kathleen Fleming | VI  
Eli\_Maurice Fuller | NM  
Natalie Henley | CT  
Varun Jain | TX  
Ashley Johnson | TX  
Grace Kelly | MN  
William Knight | FL  
Kathleen Lace | NV  
Corey Larsen | UT  
Michael Lewandowski | MA  
Benjamin MacKercher | VA  
Morris Myers | IN  
Chrystal Pascoe | NE  
Michelle Poteet | IN  
Scott Rogerson | UT  
Kelly Rombach | MI  
Omar Rosas | TX  
Kenna Schievelbein | TX  
Wallace Thomas | AK



## 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



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