



SOFE

Society of Financial Examiners

# INSIGHT

## SOFE Renewal Due By January 31, 2014

Dues for 2014 must be paid in full by January, 2014. Dues are conveniently paid online at [www.sofe.org](http://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](mailto:sofewebmaster@sofe.org) in order to receive a reminder of your login information, as well as your dues receipt, once you pay online. **Do not create a new account, as that will not access your correct record.**

## Report Your 2013 CRE Credits Online Now

2013 CRE credits must be reported no later than January 31, 2014. CRE credits are now reported online. You input your CRE credits as you earn them, and your current records will be updated automatically.

### 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).
- 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.

Guidelines on the process are also with the online form.

NOTE: Be sure you add your CDS credits from the tracking company's site, linked on the Education/Career Development Seminar page.

*File your credits before the deadline week so that you have sufficient time to ensure that all of your 2013 credits are reported correctly*  
**before January 31!**

## INSIDE

- ◆ CRE Audits
- ◆ CDS 2014 News
- ◆ Designations Awarded
- ◆ RFP for CFE2 Update
- ◆ New Members
- ◆ State Chapter News
- ◆ Future CDS Event Dates and Locations





## SOFE 2014 CDS Call for Presentations, Sponsorships



**SOFE's 2014 Career Development Seminar** will take place in vibrant and historic Philadelphia-home of the Liberty Bell, the Declaration of Independence, the Phillies, the cheese-steak, and the "Rocky" steps at the Philadelphia Museum of Art, one of the many great museums the city offers, along with its outstanding restaurants and exciting night life.

**Call for Presentations** — *Attention Prospective Presenters:* The online Call for Presentations link for 2014 CDS will be live by mid December. Potential presenters for the 2014 CDS must complete and submit their online presentation submissions by mid January. Presenters are encouraged to submit their presentation proposals early 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 available on the SOFE home page [www.sofe.org](http://www.sofe.org) by mid December, 2013. SOFE members are encouraged to forward the Call for Presentations link to potential speakers at that time.



**Sponsorship Opportunities** — SOFE will announce the sponsorship opportunities for 2014 CDS by January, along with details on the unique Sunday Night Social planned for this year's event. Details will be posted at [www.sofe.org](http://www.sofe.org) as they are finalized.

### 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 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).

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### RFP for CFE2 Test Update

**December 6**, SOFE will issue a Request for Proposal to update the CFE2 (*Analysis & Evaluation Procedures*) test. Proposals will be due to SOFE by **January 6, 2014**.

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## **Congratulations to New Designees**

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

### **CFE Designees**

Sharon Hamala — TX  
Robin Hill — FL  
Vitaliy Kyryk — IN  
Belinda R. Williams — AL  
Stephanie Falck — WI  
Bradley Hazelwood — GA  
Thomas M. Brennan — CO

### **AFE Designees**

Sonia A. Thomas — NY  
Thomas M. Brennan — CO  
Amy L. Carter — KS  
Michelle J. Kelley — TX

### **AES Designee**

James Gowins — TX

### **New Members!**

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



### **General Members**

Ryan Basnett — SC  
Andre Bougie — PA  
Thomas M. Brennan — CO  
Wendy Dubois — VT  
Jason Freedman — ME  
Rachel Gibbs — SC  
Alvah Hannaford — ME  
G. Lee Hill — SC  
William Jones — SC  
Michael Kaucher — PA  
Twyla Kelly — SC  
Thuan Khong — CA  
Jocelyn Kirby — VT

Sylvia Lawson — NY  
Fenhua Liu — CT  
Jennifer Lynch — NJ  
Kelly Monaghan — PA  
Daniel Morris — SC  
Benjamin Moss — LA  
James C. Murphy — NC  
Elizabeth Nielson — AZ  
Prashant Panavalli — NJ  
Kyle Poplos — PA  
Mary Raps — ND  
Colton Schulz — ND  
Michael Shull — SC  
Kimberly Somogyi — OH

William Starks — SC  
Paola Torres — NY  
Scott Wicker — NC  
Lauren Williams — MS

### **Regulatory Members**

John G. Coyne — MA  
Stephen Guilbeau, Jr. — LA  
Madonna Jones — LA  
James McCarthy — MA  
David McElroy — TX  
Justin Parr — WV  
John Raymond — LA



## State Chapter News

### IOWA

**Geraldine (Jerry) Mahoney**, former Iowa State Chair, passed away in September of this year at age 84 in Tempe, AZ. Jerry served many years in the industry as an Examiner before retiring in Arizona at 71.

### MASSACHUSETTS

**John P. Feeny, CFE**, former SOFE Regional Chair and former Chief Examiner for the Massachusetts Division of Insurance, passed away August 29th of this year at the age of 72. During his 40 years of service with the Massachusetts Division of Insurance, John held numerous positions in the Examination section in

addition to serving as Chief Examiner for the then Life Section of the Financial Examination Unit. His career included the early examinations of what were some of the largest life insurance companies in the industry at the time. An active SOFE member, John obtained his CFE in 1988 after which he served as the Northeast Regional Chair and later as president of the Massachusetts State Chapter. He is remembered by his former colleagues as a kind and thoughtful co-worker and mentor, with a deep understanding of the insurance industry and a ready willingness to share that knowledge and wisdom.

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## Mark Your Calendars | Upcoming SOFE Career Development Seminars



### 2014

July 27 – 30  
Philadelphia, Pennsylvania  
Loews Philadelphia Hotel



### 2015

July 13 – 16  
San Diego, California  
Town and Country Resort Hotel



### 2016

July 24 – 27  
Marco Island, Florida  
Marco Island Marriott Resort and Spa