



SOFE

Society of Financial Examiners

INSIGHT

SOFE RENEWAL DUE BY:

JANUARY 31, 2017

Dues for 2017 must be paid in full by **January 31, 2017**

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) **customer@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 2016 CRE Credits Online Now

2016 CRE credits must be reported no later than **January 31, 2017**. 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 2016 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 2016, every designee is required to have 2 credits in ethics per year. For details see the "Certification" page of 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. 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 2016 credits are reported correctly before January 31, 2017!

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.

2017 Career Development Seminar Update



JW Marriot Marco Island

SOFE's Next Career Development Seminar will take place at the **JW Marriott Marco Island in Marco Island, FL July 23-26, 2017** (Sun.-Wed.). Marco Island is the largest of Florida's Ten Thousand Islands, located on the Gulf of Mexico in Southwest Florida. Enjoy the tropical weather along with sunshine, pristine water and plenty of beach and water activities. Go "shelling" and see what shells you can find among uninhabited barrier islands blanketed with more than 400 types of seashells and other island keepsakes. With more than 80 beachside restaurants to choose from and plenty of boutiques and shops, there are endless options for food and shopping. The Florida Everglades and Naples are a short drive away. Further news on the 2017 CDS will appear in the February issue of Insight and at www.sofe.org.

Mark your calendar now for Sunday, July 23 - Wednesday July 26.



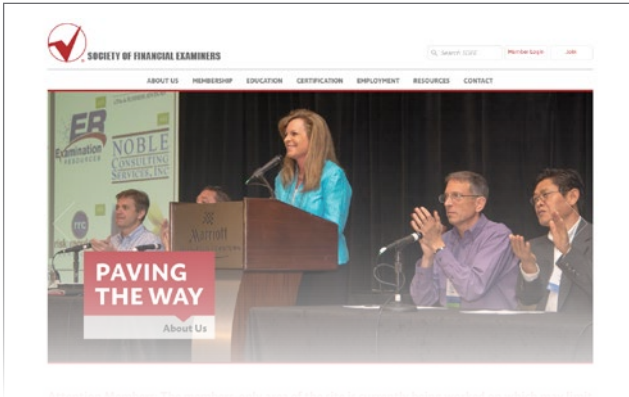
Everglades Airboat Tours

Call for Presentations ◀

Attention Prospective CDS Presenters: Potential presenters for the 2017 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 website at www.sofe.org. SOFE members will be encouraged to forward the Call for Presentations link to potential speakers.



Welcome to Our New Website



You may have noticed our website, www.sofe.org, has had a redesign. We switched our management company, and they designed our new one. Many of the pages and articles are still on the site, including the members-only area. There is still some limited functionality with the members-only area such as CRE reporting and access to updating profile information. We apologize for any inconvenience. We will be sure to make an announcement once full functionality has been restored.

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 at the "Testing" tab.*

NAIC Fall Meeting SOFE Breakfast Seminar

SOFE thanks December SOFE Breakfast Seminar sponsor, **The INS Companies**, and program presenters, Steve Guest and Shelly Schuman of INS, for offering the program, *Collaborative Examinations with Market Regulation Risk Assessments*.

Say Hello to SOFE's New Headquarters Staff

Please welcome our new headquarters staff at Association Executives Group in Oak Creek, Wisconsin. The Society office is now open from 8:00 AM to 4:30 PM CT Monday through Thursday and 8 AM to 3:30 PM CT on Fridays. Our physical address and contact information are as follows:

**7044 S 13th St.
Oak Creek, WI, 53154
Tel: 414-908-4930
Fax: 414-768-8001**

Paul Rossmann, Executive Director

Paul is your primary contact for all things SOFE related. He is responsible for the overall operations at SOFE headquarters and works closely with his staff, the SOFE President and the rest of the SOFE Executive Committee and Board of Governors who are all committed to helping our members and to the success of the organization.

Alex Llanas, Accreditation

Alex is your primary contact for CRE reporting and testing registrations.

Nicole Cheever, Membership, Conference Registration and Customer Care Manager

Nicole is your primary contact for membership transactions, meeting registrations, and address changes. She also manages our Customer Care Department and is available for assistance with other inquiries as well.

Stephanie Hazen, Graphic Designer

Stephanie will provide any design support for our association including the design of our publications and conference booklets. She also provided the art direction for our new website.

Liz Kutz, Financial Operations

Liz handles financial operations and budgets for our association. She manages our finances on a day-to-day basis and looks for ways to improve our long-term financial health.

Kayla White, Communications Coordinator

Kayla does content writing, editing and project management for our association. She uploads content to the website and edits our publications.



Mark Your Calendars Upcoming SOFE Career Development Seminars

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



2017 July 23–26

Marco Island, Florida
JW Marriott Marco Island



2019 July 21–24

Memphis, Tennessee
The Peabody Memphis



2018 July 15–18

Indian Wells, California
Hyatt Regency Indian Wells Resort & Spa



2020 July 19–22

Orlando, Florida
Walt Disney World Swan Hotel



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