

# I N SIGHT

Mar/Apr 2009  
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Society of  
Financial Examiners®

## Sacramento Is The Place To Be!!!

2009 Career Development Seminar

July 26-29, 2009

Donald A. Crawley, CPA, CFE, Vice President - CDS

Sacramento is known as the "Big Tomato" because on a warm summer day the aroma from the canneries is like a rich spaghetti sauce. Tomato is a large local crop.

### Getting There

Fly into Sacramento International Airport ([sacairports.org](http://sacairports.org)), which lies about 10 miles northwest of downtown. A taxi between the airport and downtown is approximately \$27, the SuperShuttle is \$14 one way.

### Getting Around

Explore the "Big Tomato" on foot or by bike. Bikes and Bites ([bikesandbites.com](http://bikesandbites.com)) provides locks, helmets and late-night return service. The Sacramento Regional Transit light-rail service ([sacrt.com](http://sacrt.com)) connects the city to the suburbs for about two dollars.

### History

As California's state capital, Sacramento is located in the flatlands of the Central Valley, and was founded in 1839 by the Swiss John Sutter. He worked hard for ten years to build a busy trading center and cattle ranch, only to be thwarted by the discovery of gold at a nearby sawmill in 1848. His workers quit their jobs to go prospecting, and thousands more flocked to the goldfields of the Central Mother Lode, without any respect for Sutter's claims to the land. Sacramento became the main supply point for the miners, and remained important as the western headquarters of the transcontinental railroad. Flashy office towers and hotel complexes have now sprung from its rather suburban streetscape, enlivening the flat grid of leafy, tree-lined blocks, and going some way towards resurrecting the rowdy, free-for-all spirit of the city's Gold Rush past.

### Things To Do

Sacramento's wharves, warehouses, saloons and stores of the historic core along the riverfront have been restored and converted into the touristy shops

and restaurants of **Old Sacramento** ([oldsacramento.com](http://oldsacramento.com)).



On the northern edge of the old town, the **California State Railroad Museum** (daily 10am-5pm; \$3) brings together a range of lavishly restored 1860s locomotives, with "cow-catcher" front grilles and bulbous smokestacks. The old passenger station and freight depot, a block south on Front Street, now serve as the summer depot for a refurbished **Central Pacific Railroad** steam train (summer weekends 11am-5pm; \$6; website [csrcmf.org](http://csrcmf.org)), which makes a seven-mile, 45-minute round-trip along the river. Then while in the area, tour the **California Military Museum** (<http://www.militarymuseum.org/>) and the **Wells Fargo Museum** ([www.wellsfargo.com](http://www.wellsfargo.com)).

Visit the **California State Capitol Museum** (<http://www.capitolmuseum.ca.gov/>), the **Central Library & Galleria** ([www.saclibrary.org/](http://www.saclibrary.org/)) and the **Cathedral of the Blessed Sacramento** ([www.cathedralsacramento.org/](http://www.cathedralsacramento.org/)). Car lovers can visit the **Towe Auto Museum** ([www.toweautomuseum.org/](http://www.toweautomuseum.org/)). Enjoy dinner at the award-winning Firehouse Restaurant.

Visit the area around California State University. Here you'll find the **Sacramento Zoo** ([www.saczoo.com](http://www.saczoo.com)), which has over 400 animals.

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## I N S I D E

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# Thank You To ConexServ, LLC and Jennan Enterprises

## 2009 SOFE Educational Breakfast Programs

June 14, 2009  
Hilton Minneapolis  
Minneapolis, MN  
Topic to be determined  
Jan Moenck, CFE  
RSM McGladrey

December 2009  
Date and location to be advised  
12th Annual Breakfast Symposium  
Hosted by Stroock & Stroock & Lavan LLC  
And  
The Society of Financial Examiners

These breakfast programs are open to all SOFE members and attendees of the NAIC quarterly meetings. There is no charge to attend and the attendee earns one (1) CRE credit.

Thank you to the sponsors of the Sunday, March 15th SOFE Educational Breakfast in San Diego.

The sponsors and speakers of the program were:

Scott D. Burgner, Sr. Citrix Solutions Architect CCEA CCSP MCSE  
ConexServ, LLC  
and  
Jenny Jeffers, CISA, AFE, AES  
Jennan Enterprises

The topic was Sharing Audit Management Systems with Office and Mobile Examiners with Citrix.

## Career Development Seminar 2009 Sacramento, CA

Located nearby are **Fairytale Town** ([www.fairytaletown.org](http://www.fairytaletown.org)) and **Funderland** ([www.funderlandpark.com](http://www.funderlandpark.com)), popular with children. Dine at Ford's Real Hamburgers .

**Sutter's Fort State Historic Park** (daily 10am–4.30pm; \$3), on the east side of town at 27th and L streets, is a re-creation of Sacramento's original settlement, dating back to 1839. An adobe house displays relics from the Gold Rush, and on summer weekends volunteers dress up and act out scenes from the 1850s.

**Park Placer** functions as the hub of the Grid, a hip part of town that also goes by the pedestrian name of midtown Sacramento. At the Park, ranks of curtains hang near the Park Courtyard bar, and restaurants like Mason's and Ma Jong's Asian Diner. The unusual setup, tied together by a modern fire-and-water theme, draws Governors Arnold Schwarzenegger and other VIPs from the nearby state Capitol.

The Sacramento River runs through the town. See it up-close with paddlewheeler tour on the **Delta King** ([deltaking.com](http://deltaking.com)). The historic 285-foot paddleboat floats on the river, leaving happy travelers in its wake.

And of course, Sacramento is in the midst of Cali-

fornia wine country. You are close to Napa and Sonoma counties. Here are some local wineries:

Old Sugar Mill  
35265 Willow Ave  
Clarksburg, CA 95612

Ehrhardt Estates Winery  
12300 Herzog Rd  
Courtland, CA 95615  
Revolution Wines  
2114 P St  
behind Moxy Hair  
Sacramento, CA 95816

Van Ruiten Family Winery  
(340 W Highway 12, Lodi, CA 95242  
[www.vrwinery.com](http://www.vrwinery.com)

Harbor Winery  
614 Harbor Blvd,  
West Sacramento, CA

Grand Island Vineyards  
604 Westacre Rd.  
West Sacramento, CA

So come join us in Sacramento in July 2009!!!

*Continued from page 1*

# New Members and Designees

At the March 13th meeting of the Executive Committee, the following new members and designees were approved:

## New Members

Stacey E. Alden – VT  
Thomas J. Allen - IN  
Jessica L. Carnell - LA  
Leung Wing Chan – CA  
Andrew Wa Chow – HI  
Erin E. Clapp - IN  
Perry Condon – VT  
Tony Florez - KS  
Kristofer Graap – WA

Claudis Martinez – TX  
Noah Nelson – NE  
Christopher Osuna - TX  
Marc Peterson – MO  
Noelle Shum - CA  
Kyle Smith - MS  
Patrick C. Smith – WV  
Nathan Thatcher - TX  
Melissa Zade - NE

## AFE Designees - Financial Examiner

Toni L. Bean – AL  
Peter F. Bonenberger – PA  
Norman M. Chandler - TN \*  
Cynthia Dublin-Cauley - SC  
Matthew Carl Milford - PA  
Leroy J. Moster – OH

Stephanie A. Ohnmacht - PA  
Phestrungsy Pannhanouvong – IN  
Monique D. Smith - NC  
Eli A. Snowbarger – OK  
Michael D. Young - FL

*\*Received both the AFE and CFE designations.*

## CFE Designees - Financial Examiner

Karl K. Albert - WI  
Raymond W. Anderson - OR  
Emilie Brady - ND  
Norman M. Chandler - TN\*  
Moses Chao – TX

Ronald Jankoski – CT  
Royston Lanning – TX  
Dave Lathrop - AR  
Isaak Russell - NE

*\*Received both the AFE and CFE designations.*

## AFE Designees - Financial/Rating Analysis

Elizabeth A. Muscedere - MD  
Alan Walters – AZ

## Associate Member -

Astonida Holmes Draper – TX

## Retired Members -

James Rasmus, CFE – Insurance (TX)  
Tony Trevino, AFE – Insurance (TX)

## New Student Member

At the March 13, 2009 meeting of the Executive Committee the following Student Memberships were approved:

Aman Begliyev – CA  
Robert Clark Kaler - ID

This new membership category was approved during 2008 for students who are studying accounting, insurance or financial regulation. Their membership is complimentary for the four years they are attending college.

## New AES Designees

At the March 13, 2009 meeting of the Executive Committee the following member was awarded the designation of Automated Examination Specialist:

Carol Riley – Noble Consulting

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# Serve Your Society So That Your Society Can Serve You

By Jim Hattaway, CFE  
SOFE Vice President - Marketing

*Jim Hattaway serves on the Board Governors, the Executive Committee as VP of Marketing and has been a CFE since 1994. He is currently an Insurance Examinations Supervisor with the Alabama Department of Insurance, where he has been employed since 1990. To contact Jim, please email him at jim.hattaway@insurance.alabama.gov.*

SOFE has been around for 35 years and has just recently exceeded the 1700 member mark. Personally, I've been a member of SOFE since 1990. During that time I have seen SOFE and its membership adapt to many changes – ranging from an influx of young, new examiners becoming members of SOFE, to adapting to new requirements for the examinations that financial examiners conduct, and to being held accountable for the work that examiners perform at a national level via the NAIC's Accreditation process. I'm also pleased to see that SOFE has made significant steps in revamping some of the tests for the Society's own accreditation and certification process. In addition, SOFE has developed new certification paths for analysts and IT examiners.

All of these things are great accomplishments for SOFE and most of them have been the result of a very small group of people working very hard over the past couple of decades. For those of you who have "served your turn" on a Committee, on the Board or as an Officer, a huge thank you is in order for your past service. I used to think that most people only wanted to have one of these positions in order to put it on a resume' or just to collect ribbons on their name badge at CDS. But now after having served myself and after seeing, first-hand, the contributions and progression that those who served before me have delivered to the Society, I know better.

A couple of years ago I realized that as much as I might complain or have an opinion about SOFE, I wasn't doing anything to make SOFE better. So I made the decision to serve my time on the Board of Governors and, yes, earn some ribbons for myself. Since that decision I have spent a little bit of time on the Board, the Executive Committee and various standing committees of the Board. And I now know that the vast majority of the members who serve on a committee or the Board of Governors spend a lot of time and effort trying to make SOFE a better organization.

But the Executive Committee and the Board cannot take SOFE forward alone. As SOFE continues to attempt to keep pace with the every-changing regulatory world, the Society needs your help in a few

areas. To that note, I welcome any suggestions that members might have on how SOFE can succeed in the following areas:

1.) Up until this year, it looked like the financial institutions designation path was going to be one that SOFE needed to go ahead and discontinue because of lack of interest and a total of only thirty-three members. However during 2008, three individuals have earned the AFE Financial Institutions designation, and I understand that all of these individuals are probably going to be pursuing their CFEs also. With the current state of some of the country's financial institutions, this could be a prime opportunity for SOFE to demonstrate the need for personnel who regulate the banking industry to have professional certification and continuing education requirements. Personally I don't know exactly how we can pursue or accomplish this, but out of 1700 members, maybe a couple of folks have some ideas. So, if you have suggestions, please send them to the VP of Financial Institutions, Richard Foster. You can contact Richard at richard.foster@alaska.gov.

2.) SOFE needs to keep growing its membership base. In Alabama, every financial analyst and examiner is a member of SOFE. As part of the Accreditation process and with the NAIC's help, Alabama agreed in writing to send its entire accredited examination staff to CDS every year. The career path for examiners and analysts in Alabama requires that they obtain the CFE designation and individuals are rewarded for their efforts. SOFE needs to set these goals, that Alabama has achieved, for every state insurance department and the Society needs its members' help to do that.

3.) In addition to the analysts and examiners, there are other opportunities available to SOFE to reach out and increase the membership base, but the Society needs help from membership to accomplish this outreach project. While examiners and industry personnel might wind up in adversarial positions at times, if there wasn't an insurance industry – there certainly wouldn't be any regulators. The insurance industry that we regulate can benefit greatly from membership in SOFE and attending our CDS. The Society even had several speakers at the last CDS

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from the insurance industry. In addition, SOFE had some registered participants from the industry attend CDS. Some of the people from the industry that spoke and/or attended sessions indicated that it was an eye-opening experience for them to get the regulators perspective. SOFE needs your help in increasing its membership base by letting the folks that you are regulating know that the Society wants them to join us. Our members need to make it clear that SOFE needs the industry right along beside us in learning how to fully implement this new examination approach. Such a collaborative effort between regulators and the folks that we are working with, in the insurance companies, makes the job a lot more pleasant for both sides. It is very possible that the professionals that might be interested in joining SOFE and especially interested in attending CDS might be the people that coordinate your examinations, compliance and/or internal audit personnel, accountants and, yes, even actuaries. SOFE already has a CFE or two who are actually also actuaries. Actuaries who do regulatory work or actuaries who work for the insurance industry could all benefit from membership in SOFE and our CDS.

4.) While most of us don't relish the thought of a federal regulatory scheme for the insurance industry, it is upon us – at least on a limited scale already. We want these folks working with us, and we just might wind up working for them one day. The SOFE and its membership already have the experience and infrastructure in place to provide the credentialing and continuing education required for the regulation of this industry.

We don't have enough SOFE staff to pursue all of these opportunities. Even if SOFE did, SOFE has no way of getting in touch with the right people at the right organizations. The fifty members of the Board of Governors can't even come close to making contact and following through on all of these opportunities. But, guess what? SOFE's membership does. This past year, I didn't successfully recruit any new members. But, I did mention our CDS to a few actuaries and a few industry personnel and guess what, three of them actually attended CDS in Nashville. I didn't do much more than just forward the CDS link and our brochure to these folks – next thing I know, they are asking me questions about what sessions to register for.

Don't get the wrong idea – we all have professional standards and ethics laws that we don't even want to come close to crossing. I'm not asking that you use your position to attempt to influence a person to attend CDS or join SOFE. But, if you have the opportunity, let them know that SOFE isn't just for regulators and that CDS has many topics that might be of interest to them. If you have someone that is interested or has

questions or if you know of a good candidate to join SOFE, forward that information on to me or Paula Keyes. We'll be glad to follow up.

Please serve your Society so that your Society can continue to serve you!

### Future Executive Committee Meetings

Saturday, July 25, 2009  
Sacramento, CA

Wednesday, July 29, 2009  
Sacramento, CA

### Future Board of Governors' Meetings

Sunday, July 26, 2009  
Sacramento, CA

Wednesday, July 29, 2009  
Sacramento, CA

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# State and Chapter News

## Kansas

The Kansas Insurance Department is holding an educational program on October 6 - 9, 2009. It will be full days on Tuesday, Wednesday and Thursday and half a day on Friday.

As soon as the agenda is available, they will let SOFE headquarters know as well as provide registration information.

## South Carolina

Congratulations to John Grec, who joined the South Carolina Department of Insurance examination team on February 17, 2009.

## Missouri

Gov. Jay Nixon has picked a Swiss Re insurance claims executive to lead the Missouri insurance department.

John Huff, a Missouri native, has worked since July 2008 at the Zurich headquarters of Swiss Re, one of the world's larger reinsurance companies.

The Department of Insurance, Financial Institutions and Professional Registration had been the last major Cabinet position for Nixon to fill.

Huff, 48, joined Swiss Re as a managing director and strategic claims officer in the United States in June 2006. In July 2008, Huff was promoted to the position of global head of key case management and moved to the Swiss Re's global headquarters in Zurich, to oversee some of the company's most complex issues in dispute.

Prior to joining Swiss Re, Huff was a global claims leader for GE Insurance Solutions from 1998 to 2006. From 2002 to 2004, he led GE Frankona's property claims teams throughout the European and Asian markets.

Huff began his career as an associate, and later as a partner, with Field, Gentry & Benjamin, P.C., an insurance law practice in Kansas City, Mo., from 1992 to 1998.

Huff earned his bachelor's in business administration at Southeast Missouri State University. In May 1987, he earned an MBA at St. Louis University, and he graduated from the Washington University School of Law with a juris doctorate in May 1990.

## North Carolina

Former state Insurance Commissioner Jim Long passed away February 2nd, a month after ending his 24-year run as the industry's top regulator and less than two weeks after suffering a stroke before a legislative meeting. He was 68.

Long collapsed in the Legislative Office Building before attending the final meeting of a legislative committee studying how to be better prepared to pay claims resulting from a major hurricane.

The self-described "oldest rat in the Democratic barn," Long served six terms as insurance commissioner. He was the longest-serving member of the Council of State, a panel of 10 statewide elected officials, before he retired.

Known for his dry and sometimes sarcastic wit, Long jokingly gave a hunk of cheese to Secretary of State Elaine Marshall at the panel's meeting in December because he said she would now be the "oldest rat."

Like his father and grandfather before him, Long had represented Alamance County in the General Assembly — in the 1970s — and wore his trademark red tie as a tribute to his father, George.

Long also served as the general counsel to then-House Speaker Liston Ramsey in the early 1980s before being elected insurance commissioner in 1984.

During his tenure, he was the public face in disputes between the state and the industry over automobile insurance rates, often demanding premium decreases after the N.C. Rate Bureau asked for higher annual rates. Their battles often would end up in court, where settlements often would result in refunds for motorists.

Born March 19, 1940 in Burlington, Long grew up around Democratic politics due to his family connections and remained closely involved. In 2005, he was among the first elected leaders to endorse publicly Jerry Meek as chairman when the party establishment backed the favorite of then-Gov. Mike Easley.

In addition to his wife, Long is survived by two children and several grandchildren.

## South Carolina



John Herbert Noel Cockburn, 60, of Columbia SC. Died Friday March 27, 2009 at his home. Honoring John's wishes, he will be cremated and there will be a memorial service conducted by Dr. George Crow at Northeast Presbyterian Church, 601 Polo Road, Columbia, SC., on Saturday April 25, 2009 at 3:00pm with visitation following. Memorials may be directed to; Palmetto Health Hospice, 1400 Pickens Street, Columbia SC or to the Northeast Presbyterian Church, 601 Polo Road, Columbia, SC 29223. South Carolina Cremation and Burial Society (800-758-9115 ) is assisting the family.

Born December 25, 1948 in Paris, Kentucky. John was the son of Mr. Samuel Herbert Cockburn of Columbia, SC and the late Violet S.H. Cockburn. In addition to his father John is survived by his wife of 22 years; Joyce Carlene Berry Cockburn, his daughters; Elizabeth Jan Cockburn and her son Caleb Michael Cockburn of the home and Carrie M. Bergh and her husband Harold "CHIP" Bergh, and grandsons; Austin Wheeler and Evan Holton Bergh of Richmond, VA.. Johns sisters are; Margaret Leonituk and her husband Joseph of Haliburton, Ontario and Mar de Plata, Argentina., Victoria Stone and husband Raymond of Suffolk, VA and Edna Green of Winston-Salem, NC, also surviving are the wifes family; C. Daniel and Betty Berry of Lady Lake, FL., Jan and Robert DeRoner of Coral, Springs, FL., John and Debi Berry of St. Cloud, FL., and David and Patricia Berry of Somerville. NJ. Many nieces, nephews, aunts, uncles and cousins.

John spent his childhood in Buenos Aires, Argentina where his parents were missionaries. Later he attended schools in North Carolina and Virginia. He graduated Virginia Commonwealth University in 1971 with a BS in Economics.

During his 38 years as a state insurance regulator, he was employed by the Virginia Insurance Department, he then served as the Chief Financial Examiner for the Kentucky Department of Insurance, he later served as

the Deputy Director of Financial Standards for the SC Insurance Dept, and was self employed for many years as a contract examiner for other state insurance departments.

John earned numerous professional designations. He was a member of the Society of Financial Service Professionals, the Insurance Regulatory Examiners Society, and the Society of Financial Examiners (SOFE), where he served for many years on the Board of Directors.

## Tennessee

Louise Booth - Born on March 2, 1950. Died March 26, 2009. Survived by husband, William Booth; sons, William and Norman, and mother, Gertrude Arbaiza. Louise was born in Lima, Peru. She lived many places before settling in Lafayette, TN. She is missed by many, including sisters, Edie, Pilar, Ginny, Debby and Jenifer; parents-in-law, Elva and Harley Stallard, and father-in-law, William A. Booth. Among other things, Louise enjoyed bridge, sewing, gardening and cooking.

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# CDS Registration Process For 2009

You should have received your 2009 CDS Registration Brochure recently. After mailing the brochure to membership, we learned that the Federal Per Diem room rate for the Sacramento area has increased from \$94/night to \$114/night.

Our contract with the hotel agrees on a room rate based upon the Federal Per Diem ("FPD") rather than a set dollar amount, because the FPD is the lowest available rate at the hotel. These rates are generally adjusted at the beginning of the calendar year and then not touched until the following year. But due to the economy, apparently the hotel industry in Sacramento filed an appeal and the rate was increased mid-year. This is entirely out of our control and we had no prior knowledge of this action until the housing bureau informed us of the increase.

We apologize for any inconvenience this increase will cause you in getting travel approval to attend CDS in an already very tight economy. But we have checked the non-CDS rates at the Hyatt as well as the lowest available rates at nearby hotels and the \$114/night is still significantly lower than we were able to find at comparable facilities as follows:

Holiday Inn Capital Plaza \$156  
Doubletree Hotel \$143  
Sheraton Grand \$218  
Courtyard Marriott \$164

The online registration form is available for your use at <http://www.sofe.org/education/cds/>. You will notice that the process is slightly different this year and it is a three-step process:

1. Register online to attend CDS, but the individual sessions will not be part of this step.
2. Upon hitting the submit button for your registration, you will receive a confirmation message on your screen and an e-mail confirming your registration and giving you the link to the housing bureau in order to make your reservation at the Hyatt Sacramento. All hotel reservations must be made through the housing bureau. (A registrant brought to my attention earlier today, that when you go to the housing bureau website you need to "uncheck" the box for "Show only available hotels" or you will receive an error message. I am trying to get this corrected so the default position is unchecked.)

3. In the message and the e-mail you will also receive a link and password to the agenda portion of the registration process. This link is not yet active, because the agenda has not been sufficiently finalized to allow registration to individual sessions. But the CDS Committee is working very hard on finalizing the agenda and as soon as it is available, SOFE will send a blast e-mail to all registrants directing you to that website.

If you have any questions or comments, please contact Paula Keyes at [pkeyes@sofe.org](mailto:pkeyes@sofe.org) <<mailto:pkeyes@sofe.org>>.

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# Don Fritz Memorial Award Nominations Form

The Society sponsors the Don Fritz Memorial Award annually to honor the most outstanding state chair or state liaison during the past year. This award is presented at the annual meeting of the Society during the Career Development Seminar.

Please print or type. Attach additional sheets if necessary.

Name of Member Nominee: \_\_\_\_\_

Designations, if applicable: \_\_\_\_\_

State of Employment: \_\_\_\_\_ State of Residence: \_\_\_\_\_

Discipline:     Insurance     Financial Institutions     Credit Union

Accomplishments as state chair/liaison: \_\_\_\_\_

\_\_\_\_\_

Nominated by: \_\_\_\_\_

Please return form to SOFE, 174 Grace Blvd., Altamonte Springs, FL 32714 by May 31st.

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# Founders' Award Nominations Form

The Society sponsors the Founders' Award annually to honor the member who has contributed most substantially to SOFE in the past year. Executive Committee members are not eligible. This award is presented at the annual meeting during the Career Development Seminar.

Please print or type. Attach additional sheets if necessary.

Name of Member Nominee: \_\_\_\_\_

Designations, if applicable: \_\_\_\_\_

State of Employment: \_\_\_\_\_ State of Residence: \_\_\_\_\_

Discipline:     Insurance     Financial Institutions     Credit Union

Qualifications: \_\_\_\_\_

\_\_\_\_\_

Nominated by: \_\_\_\_\_

Please return form to SOFE, 174 Grace Blvd., Altamonte Springs, FL 32714 by May 31st.

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# INSIGHT

## **SOFE Staff**

### **Executive Director:**

Paula Keyes  
pkeyes@sofe.org

### **Management**

#### **Director:**

Jeanne Lachapelle  
jeanne@sofe.org

### **Finance Director:**

Brenda Lachapelle  
brenda@sofe.org

### **Telephone:**

(407) 682-4930

### **WATS Line:**

(800) 787-SOFE  
(7633)

### **Fax:**

(407) 682-3175

### **Website:**

www.sofe.org

## **News From Headquarters**

### **2008 CRE Reporting Forms**

The 2008 CRE Reporting Forms were due on Tuesday, March 31st. After that there is a \$25 late fee. Go to the website to download your forms at <http://www.sofe.org/forms/>.

### **Membership Dues**

If you have not renewed your 2009 membership dues, do so now. You may mail your payment to headquarters or pay online with a credit card at <https://www.sofe.org/membership/renew/>.

