ASPPA
WORKING FOR AMERICA'S RETIREMENT

The Candidate Connection
Fall 2008

CPC Program Changes for 2009

****Reprinted from the Fall 2008 issue of ASPPA's The ASPPA Journal newsletter. The American Society of Pension Professionals & Actuaries (ASPPA) is an organization of actuaries, consultants, administrators and other benefits professionals. For more information about ASPPA, call 703.516.9300 or visit the Web site at www.asppa.org.*

As previously announced, all professionals who meet the requirements for the new IRS Enrolled Retirement Plan Agent (ERPA) designation will be given the opportunity to join ASPPA with the Qualified Plan Administrator (QPA) designation. Because of this new development *[and based on feedback from our members regarding the current Certified Pension Consultant (CPC) program]*, it is imperative to revitalize the CPC program and applicability of the CPC credential so that it is recognized as the "pinnacle" in retirement plan consulting expertise by the entire industry.

The revamping of the CPC program began with a job analysis to determine exactly what knowledge is required – and we've determined the credential needs to be tested in different and more relevant ways. Rather than having two proctored essay exams (C-3 & C-4), the CPC designation starting in 2009 will be obtained by passing specific core and elective online modules, along with a single comprehensive CPC essay examination.

Since this announcement was made, candidates and designees have understandably raised questions about how the program will work, what the modules will cover and what transition requirements there will be for candidates who have passed one of the current exams but not both. An informational webcast for members was held on January 30, 2008, and this article will address questions where answers were unknown at that time.

CPC Module Description, Topics and Requirements

Each module will have a text component, an optional web component and an online exam.

The questions will be designed to reflect real situations that arise as practitioners consult with clients in practice. Candidates may need to do some research before answering the questions.

It is expected that candidates will use resources and reference materials beyond the information in the text. In this way, the on-line modules will test not only a candidate's mastery of the material in general, but also the candidate's ability to research complex issues and provide the proper advice to clients.

There will be six core on-line modules required:

- **DOL Topics*;**
- **Defined Benefit Topics*;**
- **Investments;**
- **Distributions & Loans;**
- **Fiduciary Topics; and**
- **Related Groups & Business Transactions.**

* A candidate with a QPA achieved through the conventional ASPPA program will receive credit for the DOL Topics and Defined Benefit Topics modules since this knowledge was previously tested, and will therefore only have to complete four core modules and two of the three elective modules.

There will be three elective on-line modules. Credit for two of the three modules will be required:

- ESOPs;
- Governmental & Tax-Exempt Plans; and
- Nonqualified Plans

CPC Examination

One comprehensive, proctored five hour examination will be required for the CPC credential - in addition to successful completion of the on-line modules.

The exam will consist of eight multi-part essay questions covering the following topics:

- 401(k) Plans;
- Business Entities and Related Groups;
- Correction Programs & Ethics;
- Coverage & Nondiscrimination;
- Defined Benefit Plans;
- Distributions & Loans;
- Fiduciary Responsibilities including IRC §404(c); and
- Plan Design.

This exam will remain challenging, but efforts will be made to test the knowledge that the majority of CPCs need to know in practice on a frequent basis and to avoid testing truly obscure information.

This revised CPC examination will be offered for the first time in the Fall of 2009, and thereafter during both the Spring and Fall testing windows.

Transition Rules

The C-3 exam was offered for the final time in the Spring of 2008 testing window, the C-4 exam will be offered for the final time in the Fall of 2008 testing window. Intensive Review Sessions for C-4 will be held at ASPPA's annual conference in October.

Transition Plan for Candidates who have passed C-3

A candidate with a QPA achieved through the current ASPPA program who has passed C-3 only (not C-4) will receive credit for the DOL Topics, Defined Benefit Topics, Investments, Distributions & Loans, and Fiduciary Topics modules. These candidates will need to complete the Related Groups & Business Transactions module, two of the three elective modules and the proctored CPC exam.

Transition Plan for Candidates who have passed C-4

A candidate with a QPA achieved through the current ASPPA program who has passed C-4 only (not C-3) will receive credit for the DOL Topics, Defined Benefit Topics, Related Groups & Business Transactions and the two elective modules. These candidates will need to complete the Investments, Distributions & Loans and Fiduciary Topics modules and the proctored CPC exam.

2009 Program Syllabus

Additional information can be found at the ASPPA website or send your questions to education@asppa.org.

C-4 Fall 2008 Exam Schedule

As announced earlier this year, the Advanced Retirement Plan Consulting (C-4) examination will be offered for the last time during this year's fall examination window. Please adjust your plans for taking ASPPA examinations accordingly, and keep in mind that you are not required to pass the C-3 examination prior to taking the C-4 examination. For more information on the upcoming CPC program changes, please visit the Education FAQs Web page The C-4 will be offered on November 13, 2008. The final registration deadline is October 31, but you can take advantage of the early registration discount by registering by September 19. Approximately eight weeks following the examination, a list of passing candidates will be posted on the ASPPA Web site and grades will mailed to candidates.

New IRS Designation Program – ERPA
Available October 23, 2008

The Office of Professional Responsibility (OPR) of the Internal Revenue Service (IRS) with the Tax Exempt and Government Entities Division (TE/GE) implemented the recommendation of the Advisory Committee for Tax Exempt and Government Entities (ACT) that a new category of limited scope practitioner be created. This practitioner is known as an "Enrolled Retirement Plan Agent" or "ERPA." The ERPA program is established under Circular 230 of the U.S. Department of the Treasury and will be administered by the Office of Professional Responsibility.

The IRS awarded the American Institute of Retirement Education, LLC (AIRE) the contract to conduct the examinations for the ERPA program. AIRE is a unique partnership of the two foremost retirement plan professional organizations, the American Society of Pension Professionals & Actuaries (ASPPA) and the National Institute of Pension Administrators (NIPA).

An enrolled retirement plan agent is a person who has demonstrated competence in qualified retirement plan tax matters, allowing that individual to represent taxpayers before the Internal Revenue Service. An ERPA has earned the privilege of representing clients with respect to issues involving the following programs: the Employee Plans Determination Letter program; the Employee Plans Compliance Resolution System; and the Employee Plans Master and Prototype and Volume Submitter programs. In addition, ERPA's may represent clients with respect to 5500 and 5300 series forms, but not with respect to actuarial forms or schedules.

The Director of the Office of Professional Responsibility may grant enrollment as an ERPA to an applicant who demonstrates special competence in qualified retirement plan matters and who has not engaged in any conduct that would justify the censure, suspension or disbarment of the practitioner. A person wishing to become an Enrolled Retirement Plan Agent must pass a two-part ERPA Special Enrollment Examination (ERPA-SEE) as well as tax compliance and background checks. The ERPA candidate must apply for enrollment with the Internal Revenue Service and follow renewal and continuing education requirements. ERPAs will be held to professional and ethical standards of conduct. IRS experience can also allow enrollment as an ERPA (without completion of the ERPA-SEE) by virtue of past service and technical experience with the IRS.

The ERPA program will be available on October 23, 2008 at www.erpaexam.org. Interested parties can sign up to receive updates on program registration, preparatory resources and additional information pertaining to the new IRS designation program as it becomes available. For additional information or to sign up to receive updates please visit www.erpaexam.org.

The ERISA Outline Book 2008 Edition
Recommended as the reference text for the ERPA-Special Enrollment Examination (ERPA-SEE)

The ERISA Outline Book, 2008 Edition by Sal L. Tripodi, APM, J.D., LL.M. is available for purchase through the ASPPA bookstore at http://store.asppa.org. A new online version is now available. Features of this year's edition include:

- Interim and discretionary amendment guidance, including guidelines for adopting PPA 2006 amendments.
- Final regulations on IRC §415 limits, 403(b) plans, QDIAs, Roth 401(k) and IRC §409A.
- Automatic enrollment guidance, including rules for qualified automatic contribution arrangements (QACAs) and eligible automatic contribution arrangements (EACAs).
- New rules under IRC §417(e), latest guidance on cash balance plans, PPA funding rules and on benefit restrictions under new IRC §436.
- Revisions to the Form 5500 series and the determination letter procedures.
- Information on hundreds of new cases, rulings and general guidance from the courts, Treasury, IRS, DOL and PBGC.

Online access to The ERISA Outline Book is now available. In addition to the HTML format of the online edition, each chapter is also available in PDF format. Order your copy today through our online bookstore at http://store.asppa.org.

ASPPA Enrolled Actuary (EA) Fall EA-2A Review Course Registration Open

The Joint Board for the Enrollment of Actuaries (JBEA) administers two actuarial examinations that must be successfully completed by individuals to satisfy the actuarial knowledge requirement for the designation of Enrolled Actuary. These examinations are co-sponsored by ASPPA, the Society of Actuaries and the Joint Board for the Enrollment of Actuaries. The EA-1 and the EA-2 (Segment B) examinations are given each May; the EA-2 (Segment A) examination is given each November. ASPPA offers review courses to assist candidates in preparing for the EA-2 (Segment A) and EA-2 (Segment B) examinations.

In preparation for the EA-2A examination this fall, ASPPA is once again offering a weekend review course for the examination. The four-day EA-2A course is scheduled for October 3-6, 2008 in Chicago, IL.

Each student enrolled in an ASPPA EA review course receives Web access to a set of handouts, including practice problems and solutions to be worked prior to the course. The syllabus, suggested readings and other information regarding the EA examinations are included in the program.

Course participants are expected to have completed 150 hours of study time in preparation for the course. Preparation coverage should include, but is not limited to, the materials listed on the EA-2A reading lists.

The EA courses will be taught by David Farber, MSPA, EA, ASA. For more than 20 years, David has received excellent reviews for the EA preparatory and actuarial primer courses he teaches. David earned his BA in Mathematics from the University of California at Santa Cruz in 1976, his California mathematics teaching credential from the University of California in Los Angeles in 1977, and has been an Enrolled Actuary since 1982. David has been an Associate of the Society of Actuaries since 1980 and a member of ASPPA since 1985. He is a frequent speaker at ASPPA conferences and seminars, and served as ASPPA's director of technical education from October 1995 to December 1996.

Tuition for EA-2A is $1,175 for early registration and $1,250 for regular registration. For more information on the EA review courses and examinations, please visit www.asppa.org/education/ea_exams.htm.

Free Webcast for ASPPA's QPFC Program – The "Gold Standard" of the Industry, September 24th at 2pm EST

Join us for a free webcast designed especially for financial consultants and sales/marketing support staff who specialize in retirement plans. Learn more about ASPPA's QPFC (Qualified Plan Financial Consultant) credentialing program, which has become the "gold standard" in the industry for financial advisors who wish to distinguish themselves in the retirement plan marketplace. The webcast will provide an overview of the QPFC program and why it is important to you, as well as details about course materials, costs, benefits, etc. One significant benefit is that the exams required to earn the QPFC credential provide significant continuing education credits for CFP, ChFC and CLU. There will be time allocated during the webcast for additional questions on the QPFC program of ASPPA.

Sarah Simoneaux, CPC, and Chris Stroud, MSPA, will be hosting the webcast. They are both recent past presidents of ASPPA and currently work as E&E Educational Program Advocates.

For more information, contact ASPPA at (703) 516-9300, or email webcast@asppa.org

Fall Review Sessions: DC-1, DC-2, DC-3, DB and C-4

ASPPA is offering fall review sessions designed to address the most challenging topics covered on corresponding ASPPA examinations. The sessions will be held at two upcoming fall conferences: ASPPA Annual Conference (October 19-22, 2008) and The Cincinnati Pension Conference (November 13-14, 2008). Review Sessions are scheduled for DC-1, DC-2, DC-3, DB and C-4 (ASPPA Annual Conference only).

Each category will be divided into three 75-minute sessions. Attendees are welcome to attend as many sessions as they wish. There is no requirement that you be enrolled in any course program or that you ultimately take an exam, and there is no extra charge to attend these sessions if you are registered for the full conference. Some advantages of attending include:

- Brushing up on basic skills on advanced consulting topics;
- Being introduced to ASPPA's Education and Examination (E&E) program;
- Learning educational material presented in a classroom lecture format;
- Reviewing material for an upcoming exam; and
- Observing how other professionals present the material to students.

Students should not have the expectation that simply coming to a Review Session is enough to pass an exam, but your attendance should improve your chances of success! If you are considering obtaining or upgrading your professional credential, or desire continuing education credit, then this program is for you!

For more information, please visit http://www.asppa.org/education/reviewsessions.htm.

Prometric Testing Center Information and Procedures

ASPPA examinations (DC-1, DC-2, DC-3, DB, PFC-1, PFC-2 and C-4) are administered through Prometric Testing Centers in more than 300 cities in North America. To schedule an appointment, visit www.prometric.com/ASPPA or call the Prometric Candidate Services Call Center (CSCC) at 1.888.215.4136. It is necessary for you to supply the Customer Service Representative (CSR) with your candidate ID number (received in your eligibility e-mail) and state that you are scheduling an ASPPA examination. The CSR will advise you of the available dates and times at your chosen test center. You must be registered with ASPPA before you will be allowed to schedule your appointment through Prometric.

NOTE: ASPPA staff cannot assist in scheduling examinations. Saturday, Sunday and evening hours are available at some locations; however, hours of operation vary from test center to test center. The CSCC hours of operation are: Monday through Friday, 8:00 a.m. – 8:00 p.m. (ET) ASPPA examination fees are nonrefundable; however, you may transfer a registration to another colleague or candidate or postpone your examination to a future exam window by submitting the postponement form and associated fee prior to the postponement deadline.

Arrive 30 minutes before your appointment to check in and begin the tutorial.
Take one form of ID (The ID must be valid and must contain photo and signature. Acceptable forms of ID are: driver's license, passport or military ID). The name on your ID MUST match the name on your examination registration (as it appears on your eligibility e-mail). Expired IDs will not be accepted.

Change of Testing Center or Date/Time of Examination
If a candidate needs to change the date, time or location of a scheduled examination within the same testing window, he/she must contact Prometric directly, by telephone at 1.888.215.4136 or at www.prometric.com/ASPPA, within 48 hours of the scheduled examination. The ASPPA staff cannot assist with this process. If a candidate needs to change the date of a scheduled examination to another testing window, he/she must cancel the scheduled appointment with Prometric and submit an Examination Postponement Form to ASPPA by the postponement deadline. The ASPPA staff cannot assist with this process. A candidate who does not cancel a scheduled Prometric appointment directly with Prometric 48 hours prior to his/her test date/time will be charged a no-show fee of $75 for multiple choice exams and $84 for essay exams. If the candidate does not submit an Examination Postponement Form to ASPPA by the deadline, he/she also forfeits the examination registration fee and will have to pay the full registration fee to register for an examination in a future window. See Postponement Policy.

Late Arrival
Examination candidates are permitted to enter the examination room as much as 30 minutes after the scheduled examination start time. After 30 minutes, no candidates will be permitted to enter the examination room. All candidates must finish the examination by the required ending time, regardless of the time they begin. If, due to inclement weather, an examination testing site closes on the day of the examination, the candidate can postpone the exam until the next cycle. To maintain the integrity of ASPPA's examination program, examinations are given only on the dates scheduled.

Examination Materials
Candidates may not take scrap paper or other materials into or from the examination location. Any attempt to remove such materials from the examination location will be grounds for disqualification of the candidate's examination. The copying or reproduction of any examination questions or answers is expressly forbidden and may be grounds for the disqualification of the candidate's examination.

Calculators
Candidates may bring electronic calculators into the examination room. A detailed notice describing the types of calculators permitted can be found at www.asppa.org/education/ed_calccomp.htm. The use of calculators that do not fall within the permitted specifications will automatically disqualify a candidate's examination paper. Books, papers and electronic devices such as computers, pagers, palm pilots and cellular phones may not be brought into the examination room.

Lost Examinations

In the unlikely event of the loss or destruction of a completed examination, the examination fee will be refunded. ASPPA can assume no other obligation and candidates must take all examinations with this understanding.

Special Requirements
It is ASPPA's intent to accommodate candidates who have physical, visual, hearing or other special needs. Specify any accommodations you require on the examination registration form and notify the Prometric testing center when scheduling your examination.

Introducing Biometrics
Privacy Notice for Candidates

Beginning with the Fall 2008 ASPPA examination cycle, candidates will experience a more efficient and secure check in process when sitting for an ASPPA proctored examination at Prometric testing centers. Prometric is pleased to offer a Biometric Identity Management solution to increase security in their testing centers. Prometric enlisted the expertise of the world's two leading biometric organizations and implemented the Biometric Identity Management solution as part of their Candidate Identity Management System (CIMS) worldwide starting back in the summer of 2006. The goals of the Candidate Identity Management System are to improve candidate identity validation, increase security during check in and breaks, provide additional protection of intellectual property and improve candidate check-in efficiency. These goals are accomplished by automating the existing check-in process and using biometrics to track candidate movement during check-in and breaks.

The Candidate Identity Management System is designed to protect test candidate privacy and improve the security and integrity of the testing process. Please take a moment to read the Privacy Notice to Candidates about this great new feature Prometric will be bringing to your ASPPA testing experience starting this fall. You will find answers to questions such as:

How does the Candidate Identify Management System work?
To use CIMS, you must place your finger on the scanner. The CIMS equipment will create a digitized representation of your fingerprint. This representation is called a template. This template is an algorithm which represents your fingerprint. The system also stores the fingerprint image. This template will be stored with other personal information you provide to ASPPA, along with your photo identification documentation that you present at the testing center in order to test – this allows Prometric to identify you accurately during the testing process. As you move around the test center, you will be able to use your finger to authenticate yourself at the scanners located throughout the test center, avoiding the need to provide additional identification to supervisory personnel.

What information is collected in the CIMS?
The CIMS contains a digitized representation of your fingerprint, along with your name, address, telephone number (if you provided one), date of birth or age, identification document number, and a scanned copy of your identification document (such as your driver's license), which will include your digitized image.

How long is my personal information retained by the CIMS?

The fingerprint template is permanently erased from the CIMS database within forty-eight (48) hours after your test is completed. The information from your identification document, the digital image, and digitized representation of your identification document is retained for fraud investigation or other legal purposes for a reasonable period of time required for potential legal or fraud investigations. That period will not exceed five (5) years. This information is not transferred to ASPPA nor will be used for future testing.

We are very pleased that Prometric is able to offer this new, more efficient and secure service to our exam candidates. Please take a moment today to read more about Biometrics.

The 2008 Educator's Award

It is with great pleasure that ASPPA proudly recognizes Thomas J. Finnegan, MSPA, CPC, QPA, FCA, MAAA as the recipient of the prestigious 2008 Educator Award. Tom was selected by the ASPPA Board of Directors and the Education and Examination Committee's Chairs and Vice chairs in honor and recognition of his superior and dedicated commitment to education.- Tom, principal of The Savitz Organization in Philadelphia, PA, is an actuary with over 20 years experience working with all types of qualified and non-qualified retirement plans. Prior to joining The Savitz Organization, Tom served as a senior actuary for a major employee benefits consulting firm and the director of retirement plan services for a mid-sized regional consulting firm.

Tom serves on the ASPPA Board of Directors and serves as the Chair of the DB Subcommittee of ASPPA's Government Affairs Committee. In addition to his involvement with ASPPA, he is a fellow of the Conference of Consulting Actuaries and a member of the American Academy of Actuaries. He is a frequent speaker at regional and national benefit and actuarial conferences and has authored articles for national actuarial publications as well as regional newsletters. Tom has also taught semester-long EA exam preparatory classes at Temple University as well as ASPPA exam courses.

The 2008 Educator's Awards will be presented on Monday, October 20, 2008 during the luncheon at the upcoming ASPPA Annual Conference. Congratulations to Tom!

The Martin Rosenberg Academic Achievement Award

The Martin Rosenberg Academic Achievement Award is presented in honor of the late Martin Rosenberg, a Fellow of ASPPA. Mr. Rosenberg served as an Education and Examination (E&E) Committee member from 1979 to 1985 and as E&E's General Chair from 1985 until his death in 1987. The award is designed to annually recognize top performing ASPPA examination candidates. ASPPA proudly recognizes four Martin Rosenberg Academic Achievement Award winners;

Jacob Dumke is the recipient of the Martin Rosenberg Academic Achievement Award for the fall 2007 Defined Contribution Administrative Issues – Compliance Issues (DC-2) examination.
Jacob joined Pension Consultants Co., Inc. as an intern during his senior year at St. Norbert College, De Pere, Wisconsin. He graduated Cum Laude, in May, 2005, with a major in Business Administration. Following his graduation, he joined the firm as a Plan

Administrator for Defined Contribution plans. Jacob is currently pursuing his QPA credential with ASPPA.

Kevin E. Boercker is the recipient of the Martin Rosenberg Academic Achievement Award for the spring 2008 Defined Contribution Administrative Issues - Advanced Topics (DC-3) examination. Kevin is a Consultant at Spectrum Pension Consultants, Inc., specializing in qualified plan design and implementation. Prior to joining Spectrum seven years ago, Kevin graduated from Washington University in Saint Louis with a bachelor's degree in Applied Mathematics. Although Spectrum is located in Tacoma, Washington, Kevin telecommutes from Tallahassee, Florida where his wife is working on her Ph.D. at Florida State University.

Laura S. Guin, QKA, QPA, QPC is the recipient of the Martin Rosenberg Academic Achievement Award for the spring 2008 Financial and Fiduciary Aspects of Qualified Plans (C-3) examination. Laura has over 9 years of experience with defined contribution retirement plan administration. Areas of expertise include compliance testing, plan design analysis and consulting, and assisting clients with plan corrections. Additionally, Laura leads research initiatives, such as BPS&M's annual plan sponsor survey and the Wells Fargo Total Plan Index annual benchmarking study.

Melissa Bunk is the recipient of the Martin Rosenberg Academic Achievement Award for the spring 2008 Defined Contribution Administrative Issues - Compliance Issues (DC-2) examination. Melissa currently serves as an Assistant Vice President and Client Services Officer for First National Trust Company in Johnstown, PA. She has worked in the retirement industry in various capacities for approximately ten years, and recently completed the series of exams to earn the QKA designation through ASPPA.

The 2008 Martin Rosenberg Academic Achievement Awards will be presented on Monday, October 20, 2008 during the luncheon at the upcoming ASPPA Annual Conference. Congratulations to all our Martin Rosenberg Academic Achievement Award winners!

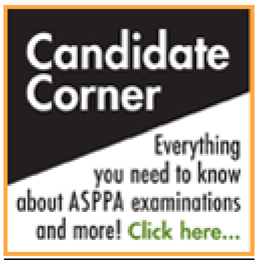
Fall 2008 Exam Registration Dates

September 19 is the early registration deadline for the fall examination window. Registration is open, so sign up today to take advantage of early registration discounts. The final registration deadline is October 31. The 2008 fall proctored examination window will be November 3 – December 12. To learn more about ASPPA examinations, visit the Education and Examination Web page on the ASPPA Web site or visit the online registration page directly. Remember to register early and contact Prometric to schedule your examination appointment immediately after you receive your eligibility e-mail. Please keep in mind that the most preferred spots do generally fill up quickly—particularly for the C-4 examinations, since this will be the last year that this examination is offered—so plan to make your appointment as soon as possible after receiving the e-mail from ASPPA.

Retirement Plan Fundamentals (RPF) Exam Deadline – Midnight, EST 12/15/08

The deadline to submit 2008 RPF-1 and RPF-2 examinations is fast approaching. Remember, any RPF exam you have registered for during the 2008 calendar year must be completed and submitted by December 15, 2008 (Midnight, EST). RPF-1 and RPF-2 are online, open-book exams. Once registered, you can access an online exam at any time through your

ASPPA account. You may exit and return to an exam at a later date, but exams must be submitted by no later than Midnight, Eastern Standard Time (EST), December 15, 2008. For more information and to register for an RPF exam, please visit www.asppa.org/education/ed_rpf_info.htm. Study materials for the examinations are available to purchase through December 1, 2008; please be sure to check the study guide references Web page for any updates to the materials before you begin your exam.



If you are preparing for an ASPPA exam, be sure to visit ASPPA's Candidate Corner at www.asppa.org/education/ed_ee_cc.htm for the latest updates, test taking tips, examination and Prometric policies and other resources to help you prepare for your examination.

Stay in Touch

We need your help. Please don't forget to update your contact information if you move, accept a new job or simply change your e-mail address. It's quick and easy to update your contact information by logging into your online account on the ASPPA Web site. Keeping your information current ensures that ASPPA can communicate important examination and educational updates to you—whether we're announcing an important change in policy or reminding you of examination deadlines. We want you to have the information you need to pursue your professional development goals, so please remember to let us know if your contact information changes. Questions? E-mail education@asppa.org.

2008/2009 Education Calendar

Fall 2008

August 22-25, 2008	EA-2A ASPPA Review Course, Washington, DC
September 19, 2008	Early registration deadline for fall examinations
October 3-6, 2008	EA-2A ASPPA Review Course, Chicago, IL
October 19, 2008	ASPPA Annual Conference Intensive Review Sessions
October 31, 2008	Final registration deadline for fall examinations
November 3 – December 12, 2008	DB, DC-1, DC-2, DC-3, PFC-1, PFC-2 fall examination window
November 6, 2008	Postponement deadline for C-4 and A-4 examinations*
November 13, 2008	C-4 examination

November 14, 2008	A-4 examination
December 1, 2008	Postponement deadline for DC-1, DC-2, DC-3, DB, PFC-1, PFC-2 fall examinations*
December 15, 2008	Deadline for completing and submitting RPF-1 and RPF-2 online examinations (Midnight, Eastern Time)
December 30, 2008	DC-1, DC-2, PFC-1 and PFC-2 Webcourses Access to webcourses available until COB on 12/30/2008

Spring 2009

March 21, 2009	The ASPPA 401(k) SUMMIT PFC-1 and PFC-2 Review Sessions
TBA	EA-2B Review Courses
April 17, 2009	Early registration deadline for spring exams
May 13, 2009	Final registration deadline for spring exams
May 14 – June 26, 2009	DB, DC-1, DC-2, DC-3, PFC-1 and PFC-2 spring examination window
June 12, 2009	Postponement deadline for DB, DC-1, DC-2, DC-3, PFC-1 and PFC-2 spring exams

Fall 2009

TBA	EA-2A Review Courses
September 28, 2009	Early registration deadline for fall exams
October 30, 2009	Final registration deadline for fall exams
November 1, 2009	Annual Conference Review Sessions
November 2 – December 11, 2009	DB, DC-1, DC-2, DC-3, PFC-1 and PFC-2 fall exam window
November 5, 2009	Postponement deadline for A-4 exam
November 13, 2009	A-4 examination
November 14, 2009	CPC examination
December 1, 2009	Postponement deadline for DB, DC-1, DC-2, DC-3, PFC-1 and PFC-2 fall exams
December 15, 2009	Deadline for submitting RPF-1 and RPF-2 exams