

# Continuing Professional Education Program Reporting Form 2009 - 2010 Cycle



## Member Information:

ASPPA Member name: \_\_\_\_\_ Credential(s): \_\_\_\_\_  
 Company name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Daytime phone: \_\_\_\_\_ Fax: \_\_\_\_\_

**Please note:** All programs for which credit is sought must have been completed prior to submission of this form. Forty credits are required for all credentialed members in order to maintain your designation. Waivers and prorated amounts are available for special circumstances.

## Retired

If you qualify for retired status, please complete this section and proceed to Section VIII.

I am at least 60 years old and am actively employed less than 500 hours annually and, therefore, request to have my CPE requirements waived.

Birth date: \_\_\_\_/\_\_\_\_/\_\_\_\_ Approximate number of hours actively employed: \_\_\_\_\_

## Section I: Educational Programs and Exams Sponsored by ASPPA

Please check the appropriate boxes to indicate which of the following activities you completed during the 2009-2010 Continuing Professional Education cycle. If the number of credits checked in this section is 40 or greater, proceed to Section VII. If the number of credits checked in this section is 40 or greater (including 1 Ethics CE), proceed to Section VII. Please note in 2011-2012 cycle, the Ethics requirement is 2 CPEs.

### 2009

- ACOPA Advanced Actuarial (15 credits)
- ACOPA Actuarial Symposium (15 credits)
- ASPPA Annual Conference (24 credits)
  - ERPA Review (4.8 credits each):  Part I  Part II
  - Intensive Reviews(1.5 credits each):  Part I  Part II  Part III
- The ASPPA 401(k) SUMMIT (15 credits)
  - PFC-1 (2.7 credits)
  - PFC-2 (2.7 credits)
- The ASPPA Cincinnati Pension Conference (8.5 credits)
  - Intensive Reviews (4.5 credits)
- Benefits Conference of the South (15 credits)
- DOL Speaks: Employee Benefits Conference (15 credits)
- Great Lakes Benefits Conference (15 credits)
- Los Angeles Benefits Conference (15 credits)
  - Pre-Conference Sessions (4.5 credits)
- Northeast Area Benefits Conference (8 credits)
- Western Benefits Conference (20 hours)
- Women Business Leaders Forum (15 credits)
- Local ASPPA Benefits Council meeting(s) \_\_\_\_\_ (1 credit per 50 minutes)
- Webcast (2 credits)
- Webcourses (1 credit per 50 minutes)
- ASPPA EA-2(A), EA2(B) Weekend Course (15 credits)
  - Course: \_\_\_\_\_ Date: \_\_\_\_\_ City: \_\_\_\_\_
  - Course: \_\_\_\_\_ Date: \_\_\_\_\_ City: \_\_\_\_\_
- ASPPA PFC-1, PFC-2, TGPC-2, DC-1, DC-2, DC-3, DB, CPC, A-4
  - Exam: \_\_\_\_\_ Date: \_\_\_\_\_ (20 credits for passing grade of 7,8 or 9;
  - Exam: \_\_\_\_\_ Date: \_\_\_\_\_ 15 credits for viable score of 5 or 6)
- RPF-1, RPF-2 and TGPC-1 (7.5 credits)
- CPC Modules (3 credits each)
- ERPA-SEE Parts 1 and II (20 credits each for passing)
- The ASPPA Journal Quiz (3 credits)
- Ethics/Professionalism
  - ASPPA Webcast (1 credit)
  - ASPPA Annual Conference (1 credit)
  - Western Benefits Conference (1 credit)
  - Other (1 credit)

**Total credits in this section:** \_\_\_\_\_

### 2010 (credits subject to change)

- ACOPA Advanced Actuarial (15 credits)
- ACOPA Actuarial Symposium (15 credits)
- ASPPA Annual Conference (24 credits)
  - ERPA Review (4.8 credits each):  Part I  Part II
- The ASPPA 401(k) SUMMIT (14 credits)
- The ASPPA Cincinnati Pension Conference (15 credits)
- Benefits Conference of the South (16.5 credits)
- DOL Speaks: Employee Benefits Conference (15 credits)
- Great Lakes Benefits Conference (12.5 credits)
- Los Angeles Benefits Conference (15 credits)
  - Pre-Conference Sessions (4.5 credits)
- Northeast Area Benefits Conference (8.5 credits)
- Western Benefits Conference (15.5 hours)
- Women Business Leaders Forum (16.2 credits)
- Mid-Atlantic Benefits Conference (14.5 credits)
- NTSAA 403(b) Compliance Resolution Summit (12.4 credits)
- NTSAA Annual Conference (16 credits)
- ERPA Conference (10.5 credits)
- Local ASPPA Benefits Council meeting(s) \_\_\_\_\_ (1 credit per 50 minutes)
- Webcast (2 credits)
- Webcourses (1 credit per 50 minutes)
- ASPPA EA-2(A), EA2(B) Weekend Course (15 credits)
  - Course: \_\_\_\_\_ Date: \_\_\_\_\_ City: \_\_\_\_\_
  - Course: \_\_\_\_\_ Date: \_\_\_\_\_ City: \_\_\_\_\_
- ASPPA PFC-1, PFC-2, TGPC-2, DC-1, DC-2, DC-3, DB, CPC, A-4
  - Exam: \_\_\_\_\_ Date: \_\_\_\_\_ (20 credits for passing grade of 7,8 or 9;
  - Exam: \_\_\_\_\_ Date: \_\_\_\_\_ 15 credits for viable score of 5 or 6)
- RPF-1, RPF-2 and TGPC-1 (7.5 credits)
- CPC Modules (3 credits each)
- ERPA-SEE Parts 1 and II (20 credits each for passing)
- The ASPPA Journal Quiz (3 credits)
- Ethics/Professionalism
  - ASPPA Webcast: TBD (1 credit)
  - ASPPA Annual Conference: TBD (1 credit)
  - Western Benefits Conference: TBD (1 credit)
  - Other (1 credit)

**Total credits in this section:** \_\_\_\_\_

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## Section II: Non-ASPPA-Sponsored Educational Programs

Please indicate below any non-ASPPA professional meetings/programs not covered in Section II that you attended during the 2009-2010 cycle that you believe qualify for Continuing Professional Education credit. Credit is computed on a 50 minutes = one CPE credit basis with a maximum of 15 credits per program.

	Program Sponsor	Date	Major Topic(s)	Length of Program	Requested CPE Credits
A.					
B.					

Total credits in this section: \_\_\_\_\_

## Section III: Qualified In-House Training Programs

Please indicate below any in-house training programs that you have participated in during the 2009-2010 Continuing Professional Education cycle that you believe qualify for CPE credit. Credit is computed on a 50 minutes = one CPE credit basis with a maximum of 15 credits per program.

	Program Sponsor	Date	Major Topic(s)	Length of Program	Requested CPE Credits
A.					
B.					

Total credits in this section: \_\_\_\_\_

## Section IV: Qualified Study Groups and Non-ASPPA Self-Study Programs

Please indicate below any qualified study groups or non-ASPPA self-study programs that you have participated in during the 2009-2010 cycle that you believe qualify for Continuing Professional Education credit. Credit is computed on a 50 minutes = one CPE credit basis with a maximum of 15 credits per self-study program or qualified study group session. Study groups must contain at least one ASPPA credentialed member. The self-study program must contain an examination or other procedure by which you demonstrate your mastery of the subject matter.

	Activity	Date	Major Topic(s)	Length of Program	Score Received (if self-study)	Requested CPE Credits
A.						
B.						

Total credits in this section: \_\_\_\_\_

## Section V: Other Professional Activities

This section is designed to allow you to list any other professional activities in which you were involved during the 2009-2010 Continuing Professional Education cycle that you believe qualify for CPE credit.

	Program Sponsor	Date	Major Topic(s)	Length of Program	Requested CPE Credits
A.					
B.					

Total credits in this section: \_\_\_\_\_

## Section VI: Other Ethics/Professional Credits

This section is designed to allow you to list any other professional activities in which you were involved during the 2009-2010 Continuing Professional Education cycle that you believe qualify for CPE credit.

	Program Sponsor	Date	Major Topic(s)	Length of Program	Requested CPE Credits
A.					
B.					

Total credits in this section: \_\_\_\_\_

## Section VII: Total

Total credits in all sections: \_\_\_\_\_ (40 CPE credits required, unless subject to prorated amounts due to date of designation).

## Section VIII: Signature (Signature is required for form to be complete).

I verify that I have fulfilled the 2009-2010 ASPPA Continuing Professional Education requirements.

Date \_\_\_\_\_ Signature \_\_\_\_\_



Mail or fax form to: 4245 North Fairfax Drive, Suite 750  
Arlington, VA 22203  
Fax: 703.516.9308