

**Apply Now!**  
**Questions?**  
**Call 800-308-6714**

# American Society of Enrolled Actuaries (ASEA)

## Application for Credentialed Membership

All members must meet JBEA requirements. Membership in ASEA must be renewed annually to retain credentials.

Mr./Mrs./Ms. Name: \_\_\_\_\_  
(circle one) First MI Last (former name)

Company: \_\_\_\_\_  
(provide company name, even if home address is noted below) Company Owner's Name(s): \_\_\_\_\_

Title: \_\_\_\_\_  I am the owner

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Home  Business

Work Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Home Zip Code (for government affairs purposes): \_\_\_\_\_

Email Address: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

### Application for:

MSEA (Member, Society of Enrolled Actuaries)  
JBEA Enrollment No: \_\_\_\_\_

FSEA (Fellow, Society of Enrolled Actuaries)

### Which professional Credential(s) do you hold?

ACA  EA  FCAS  
 ASA  CERA  FSA  
 ACAS  FCA  MAAA

### Which position best describes your work?

Accountant/Plan Auditor  Home Office (BD, RIA, DCIO)  Other: \_\_\_\_\_  
 Actuary  Institutional Trainer  
 Advisor — 401(k)  Recordkeeper  
 Advisor — 403(b)/457 Plan  TPA/Plan Administrator  
 Attorney  Wholesaler (External)

### Which business most closely describes your place of employment?

Accounting  Government Entity  Legal  
 Actuarial/Employee Benefits  Human Resources  Mutual Fund/DCIO  
 Bank/Savings & Loan  Industry Training  Plan Sponsor  
 Brokerage  Insurance Agency  Recordkeeper  
 Computer/Software  Insurance Provider  TPA  
 Consulting  Investment Consulting  TPA — Producing  
 Educational Institution  Investment Provider  Other: \_\_\_\_\_

I understand that to be considered for FSEA and MSEA membership in the American Society of Pension Professionals & Actuaries (ASPPA) and the American Society of Enrolled Actuaries (ASEA), I must be an enrolled actuary in good standing with the JBEA, have high ethical standards and must not be under investigation(s) or have had any sanctions imposed against me by the Actuarial Board for Counseling and Discipline (ABCD). I hereby give my consent to ASPPA to verify my status with the ABCD. I further understand that my membership application/reinstatement may be rejected or put on hold if I am under investigation by the ABCD or pending a disciplinary proceeding by any other ABCD organization.

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

### Code of Conduct:

Have you been found guilty of a felony, violation of insurance or securities regulations or any violation of the code of ethics of any professional or business organization?

No  Yes (If yes, explain on a separate attachment.)

I have read the ASPPA Code of Professional Conduct and the Code of Professional Conduct for Actuaries. If my application is accepted I agree to abide thereby. I certify that the information provided in this application is true and correct to the best of my knowledge. (If you do not have a copy of the ASPPA Code of Professional Conduct, please call the ASEA office to request one.)

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

**Payment Information:**

ASPPA Benefits Council Members receive a \$50 discount on the first year's dues payment.

**Payment Date:**

- Jan. 1-Jun. 30
- Jul. 1-Oct. 31
- Nov. 1-Dec. 31

**Dues Payment:**

- \$730 (dues through 12/31)       \$50 Retired or Government Employee (dues through 12/31)
- \$365 (dues through 12/31)
- \$730 (includes next year's dues)

I am paying by       Check    Money Order    Mastercard    Visa    Amex    Discover

Name as it appears on card: \_\_\_\_\_

Card No.: \_\_\_\_\_ Exp.Date: \_\_\_\_\_

Signature: \_\_\_\_\_

**Remit Payments:**

**Paying by check?** Please send your completed application to: ASPPA, P.O. Box 34725, Alexandria, VA, 22334-0725.

**Paying by credit card?** Please fax your completed application to 703.516.9308 or email [accountsreceivable@usaretirement.org](mailto:accountsreceivable@usaretirement.org).

Dues appearing on this application are not valid after December 31, 2023.

**Questions?** Please call us at 800.308.6714.

**Tax Deductions:**

Dues, contributions or gifts to ASEA are not deductible as charitable contributions; they may be deductible, however, as ordinary and necessary business expenses. Federal law prohibits a tax deduction for the portion of membership dues attributable to lobbying expenses incurred by the organization. Consequently, for 2023, 10% of your dues are non-deductible in accordance with this provision.



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