



# The ASPPA College of Pension Actuaries (ACOPA) 2019 Fellow Nomination Form

(See Instructions on page 3)

## **Part A**

**NOMINATION OF:** \_\_\_\_\_  
(Nominee's Full Name)

**FIRM/EMPLOYER:** \_\_\_\_\_

**TELEPHONE NUMBER:** \_\_\_\_\_

**FAX NUMBER:** \_\_\_\_\_

**EMAIL ADDRESS:** \_\_\_\_\_

**NOMINATOR:** \_\_\_\_\_  
(Sponsoring Nominator's Name)

**FIRM/EMPLOYER:** \_\_\_\_\_

**TELEPHONE NUMBER:** \_\_\_\_\_

**FAX NUMBER:** \_\_\_\_\_

**EMAIL ADDRESS:** \_\_\_\_\_

NOMINATION OF \_\_\_\_\_

**Part B**

1. Nominee's relationship to nominator: [an FSPA or MSPA may not nominate someone in his or her firm, a client, or a family member]
2. Length of time nominator has known nominee:
3. Circumstances under which nominator has become familiar with the nominee:
4. Do you believe that the nominee has been an Enrolled Actuary for 15 or more years?
5. Do you know of (1) any complaint that has been made against nominee to the Actuarial Board for Counseling and Discipline (ABCD) or any ethics committee of any professional association or of any professional disciplinary action against nominee or (2) any claim (whether or not the subject of a filing in an adjudicatory forum) for professional negligence or misfeasance against nominee? If so, describe the date of the complaint or claim, its nature, the name of the committee or adjudicatory forum (if any), and the disposition, and include any additional information about the complaint or claim that ACOPA should consider.
6. Please describe in a meaningful and substantive manner why you believe that nominee has demonstrated a sustained commitment to the development of the actuarial profession through such activities as described on the final page of the application.

**Certification:** I certify that, to the best of my knowledge and belief, the foregoing information is true and nominee meets the qualifications for admission as a FSPA.

**Nominator**

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

**Date:** \_\_\_\_\_

**ASPPA COLLEGE OF PENSION ACTUARIES (ACOPA)  
FELLOW NOMINATION FORM**

**Instructions:**

Any MSPA or FSPA may nominate a qualified candidate for consideration for an FSPA designation. The nominators may not be partners in, nor be employed by, the same entity as the nominee. Nominators may not have a family relationship with the nominee nor may the nominee be a client of either nominator. A nominator may however be a client of nominee.

To nominate an MSPA that you believe meets the qualifications described on the following page, please complete the FSPA Nomination Form and return it to the FSPA Committee of ACOPA. Once the committee has received two forms nominating the individual, he or she will be notified by the FSPA Committee, and provided with the FSPA application form. The nominee will be required to complete the application and submit it no later than July 15, 2019, for consideration for 2019. ***Therefore, please complete and submit this nomination form by June 17, 2019,*** to give the applicant time to complete and submit the application in time for consideration in 2019.

The candidacy of the nominated individual will be considered by the FSPA Committee based on the qualifications outlined on the following page. If approved by the FSPA Committee, and confirmed by the ACOPA Executive Committee, the candidate will be awarded his/her FSPA designation at the ACOPA Transition meeting held in conjunction with the next ASPPA Annual meeting.

The Nomination Form is divided into two sections. Both sections of the form must be submitted in one single electronic document. Incomplete or untimely Nomination Forms will not be considered.

The nominator statements should be meaningful, substantive and complete. A nominator should not assume that Committee members have personal knowledge of nominee. The nominator needs to make the case as to why his or her nominee should be elected as a Fellow.

Sign the completed form and send it electronically to the ACOPA FSPA Committee at [acopa@usaretirement.org](mailto:acopa@usaretirement.org). ***Please include "FSPA Nomination" in the subject line of the email.***

**ASPPA COLLEGE OF PENSION ACTUARIES (ACOPA)**

**FELLOW QUALIFICATIONS**

The qualifications for admission as an FSPA under the nomination and application track are demonstrations of *technical and thought leadership in the pension actuarial field over an extended period of time at a very high level*. Applicants for the FSPA designation through the nomination and application track must also satisfy the following:

1. No individual will be considered for the Induction Class if he or she does not have 15 years of experience as an Enrolled Actuary prior to the date of the application.
2. Each candidate must be nominated by at least two ACOPA members (MSPA or FSPA) who attest to the candidate's accomplishments.
3. The individual must have consistently exhibited exemplary character and ethical behavior. The actuary's status as an Enrolled Actuary must be in good standing and the candidate must have never been subject to discipline (not counseling) by any actuarial professional organization.
4. The individual is generally recognized by his or her peers for expertise in the actuarial field.

The following shall be considered as evidence of qualifications

- Speaking at national conferences sponsored by ACOPA, ASPPA, American Academy of Actuaries, Conference of Consulting Actuaries, SOA, NIPA, IRS and other nationally recognized sponsors on topics relevant to enrolled actuaries. Teaching classes on topics relevant to enrolled actuaries for nationally recognized sponsors, colleges and/or Universities;
- Advanced degrees in actuarial science;
- Other designations issued by National organizations, such as ASPPA, SOA, and others,
- Articles and papers on topics relevant to enrolled actuaries published in professional, trade or other press;
- Participation and leadership in ASPPA or ACOPA's Government Affairs Committee, ASPPA or ACOPA's Retirement Plan Academy Advisory Council, the Pension Practice Council of the Academy, the Pension Subcommittee of the Actuarial Standards Board and similar experience;
- Testimony before National, State, or local elected representatives and /or regulators on matters relevant to enrolled actuaries, the profession, or retirement systems.