



Stipend will be paid in two installments: July 15, 2010 & December 15, 2010.

Application Deadline: February 15, 2010

Date:

Contact Information

Form with fields for MR MS, Last Name/Family Name, First Name, Middle Name, Street or P.O. Box, Date of Birth (m/d/y), City, State/Province, Zip/Postal Code, Country, Business Phone, Home Phone, Cell Phone, E-Mail.

Doctoral Program Enrollment/Educational Institution

Are you currently enrolled as a full-time doctoral student in a qualifying doctoral program in the United States or Canada?

(Circle one) Yes No

If yes, complete the information requested in the next four rows. If no, skip to the last row in this section.

In what type of program are you enrolled? (e.g. Actuarial Science, Business, Financial Economics, Risk Management)

Form with fields for Name of University (include city and state/province), Program start date, Estimated completion date of program.

Required documentation-Statement of Progress: Arrange for your PhD program supervisor/director to provide a statement attesting to progress in your doctoral program to date.

Required documentation-Undergraduate and Graduate Transcripts: Arrange for your undergraduate and graduate transcripts to be sent to the SOA office.

Note: All required documentation must be sent from the school or official directly to Debbie Winiarz at the SOA office by the application deadline.

Program supervisor/director – Contact information:

Form with fields for Name, Title, Email, Phone.

If NOT yet enrolled in a doctoral program, please provide the names of the schools/programs to which you have applied and the intended field of study in each school/program (Use an additional sheet of paper if needed.):

Verification of Enrollment

Required documentation-Verification of Enrollment: Prior to disbursement of any stipend, an appropriate university official must provide a signed letter on university stationery, with the official's title, verifying your enrollment in the doctoral program.

Note: All required documentation must be sent from the school or official directly to Debbie Winiarz at the SOA office by the application deadline.

Actuarial Credential/Progress on Exams

Please name all actuarial credentials you currently hold. All applicants must have at least two actuarial exams passed.

If NOT yet a credentialed Fellow, please list on the next page the exam(s) you have passed with any of the following organizations: CAS, CIA, FA, IA, IAA, and SOA. Exams attempted, but not yet passed may also be listed (scores optional). Those who have attained Associateship need not list Associate-level exams. (Use an additional sheet of paper if needed.)

Stipend recipients are expected to pursue a Fellowship credential if not already attained.



| Exams Passed | | Exams Attempted (not yet passed) | | |
|--------------|--------------|----------------------------------|--------------|-------|
| Exam | Organization | Exam | Organization | Score |
| Exam | Organization | Exam | Organization | Score |
| Exam | Organization | Exam | Organization | Score |

Required documentation-Actuarial Exam Transcripts: Transcripts for exams passed with organizations other than the SOA must be provided. The transcript must be sent from the organization directly to Debbie Winiarz at the SOA office by the application deadline (address provided on page 2 of this application).

Statement of Interest
Required documentation-Statement of Interest: Attach a statement of interest for your doctoral program that includes your goals regarding teaching, research and contributions to the actuarial profession.

Citizenship (U.S. or Canadian citizenship is not expressly required, but an applicant's citizenship status may be used to evaluate the likelihood that the applicant will pursue an academic career in the United States or Canada.)

Are you a citizen or permanent resident of the United States or Canada?
 (Circle one) Citizen Permanent Resident What country? N/A

If you answered N/A above, please indicate whether you have applied for citizenship or permanent residency with the United States or Canada and any future plans in this regard:

Career Plans
 Do you intend to pursue an academic actuarial career in the United States or Canada?
 (Circle one) Yes No Uncertain

Please elaborate on your career plans after completing your PhD (Use an additional sheet of paper as needed.):

Required documentation-Resume: Include all actuarial-related work history and education.

Have you previously applied for this Doctoral stipend? (Circle one) Yes No If yes, for what academic year?

Documentation
 This completed application and the required documentation listed below must be received by the SOA office at the address below no later than **February 15, 2010**. With the exception of the Statement of Interest and Resume, the applicant must arrange for the following documentation to be sent directly from the school/organization or individual to the SOA. Documents will be matched with the application upon their arrival. (If not yet enrolled in a doctoral program provide as much of the following as possible.):

- Statement of Progress - Statement from supervisor/program director attesting to progress in doctoral program
- Undergraduate Transcripts - Original transcripts of grades for all undergraduate courses completed
- Graduate Transcripts - Original transcripts of grades for all graduate courses completed
- Verification of Enrollment - Letter from school official verifying enrollment in a doctoral program
- Actuarial Exam Transcripts – Transcripts for actuarial exams passed with organizations other than the SOA
- Statement of Interest - Statement of interest for doctoral program
- Resume
- Reference letters (3 recommended)

I represent that, to the best of my knowledge and belief, the information provided in this application is true, complete and accurate, and I understand that falsification of any information may lead to disciplinary action and/or loss of stipend.

| | |
|---|---|
| APPLICANT'S SIGNATURE: | DATE: |
| Application and required documentation should be sent to: Debbie Winiarz Academic Administrator Society of Actuaries 475 N. Martingale Road, Suite 600 Schaumburg, IL 60173-2226 U.S.A. | Questions regarding this application process should be directed to: Debbie Winiarz at dwiniarz@soa.org |



SOA DOCTORAL STIPEND PROGRAM – PURPOSE

The Doctoral Stipend program was established to increase the number of academic actuaries who hold a PhD and an actuarial designation, and who intend to pursue academic careers in the United States or Canada. The program is designed to provide stipends to doctoral students who will through their studies address research and education needs of the profession, including both the theoretical and practical aspects.

APPLICATION DEADLINE

Read and complete in full the information requested in this application and submit along with all other requested documentation to the address provided on page 2. **The Application Deadline for all materials is February 15, 2010.** Stipend recipients will be announced April 15, 2010. Recipients must notify the SOA of acceptance of the stipend by May 15, 2010.

AMOUNT OF STIPEND

Each stipend is generally \$20,000 per academic year, renewable up to four times upon evidence of satisfactory progress on both the doctorate and actuarial credential, continuing satisfaction of any other doctoral stipend criteria set forth by the SOA, and the availability of adequate funding. The stipend may be used at the discretion of the doctoral student for expenses that will aid in the completion of the PhD and the actuarial credential if not yet attained. Applicants should be aware that stipend funds are provided for qualified expenses (tuition, books, fees, etc.). Qualified expenses do not include room and board. Stipend funds not used for qualified expenses may be taxable. Please consult your tax advisor if you have any questions.

Renewal of a Doctoral Stipend is not guaranteed.

Stipends are awarded at the sole discretion of the SOA and all decisions are final. Failure to meet eligibility requirements on a continuing basis may subject recipients to loss of stipend.

Additional information for completing this application

Please PRINT all information.

CONTACT INFORMATION

- Indicate your full legal name, complete mailing address, telephone number(s), and e-mail address.
- Indicate your date of birth (using month-day-year format).

DOCTORAL PROGRAM ENROLLMENT/EDUCATIONAL INSTITUTION

- Confirm whether or not you are currently enrolled in a qualifying doctoral program in the United States or Canada
 - A qualifying doctoral program is one in actuarial science or a field related to actuarial science (e.g. business, demography, economics, financial economics, insurance, mathematics, risk management, statistics).
 - Applicants may apply at the same time they are applying for a doctoral program; if selected these applicants will be awarded the stipend conditional upon enrollment in a qualifying doctoral program.
 - Current doctoral students may apply, however, strong preference will be given to students entering or in the first year of a doctoral program.

VERIFICATION OF ENROLLMENT

- Prior to disbursement of any stipend, an appropriate university official must provide a signed letter on university stationery, with the official's title, verifying your enrollment in the Doctoral program. **The letter must be sent from the official directly to Debbie Winiarz at the SOA office by the application deadline** (address provided on page 2 of this application).



Additional Information for Completing Application (cont')

ACTUARIAL CREDENTIAL/PROGRESS ON EXAMS

- Confirm whether or not you currently hold a Fellowship-level actuarial credential or are pursuing Associateship or Fellowship membership of an accrediting actuarial organization (i.e. CAS, CIA, FA, IA, IAA, SOA).
 - Applicants who are already Associate members (including those awarded the CERA designation) will be expected to pursue a Fellowship credential.
- All applicants must have at least two actuarial exams passed.

STATEMENT OF INTEREST

- Attach a statement of interest. This may be the same statement submitted for the doctoral program, but additional language should be added for this application to clearly explain your goals regarding teaching, research and contributions to the actuarial profession.
- A goal of the program is to provide stipends to those individuals who will address research and education needs of the profession, including both the theoretical and practical aspects. Statements of interest will be evaluated to determine level of commitment to the profession.

CITIZENSHIP

- The Doctoral Stipend program was established to increase the number of university faculty working in the United States and Canada who hold both a PhD and an actuarial credential. While U.S. or Canadian citizenship is not expressly required to apply for a stipend, you must attest to citizenship status on this application. Citizenship status may be used to evaluate the likelihood that you will pursue an academic career in the United States or Canada. Additional comments in this regard are welcome.

CAREER PLANS

- Complete the questions in this section regarding your future career plans and previous work history.

DOCUMENTATION

- Review the bulleted items in this section of the application to ensure that you submit all the necessary documentation. (Note: With the exception of the Statement of Interest and Resume, all required documentation must be sent directly from the school/organization or individual to the SOA by the application deadline.)