

Society of Actuaries Research Report Format Policy

In order to ensure research reports preserve the Society of Actuaries' goals of objectivity and independence, the following policy has been developed. This policy applies to research reports that appear on the Society of Actuaries Web site and in print. It is intended to be used as a guide by contracted researchers and others producing research content intended for publication by the Society of Actuaries.

The following are specific guidelines:

1. A non-Society of Actuaries logo may appear only on the front page of a report.
2. The Society of Actuaries copyright notice or acknowledgement must appear on every page of the report.
3. No non-Society of Actuaries letterhead, design, color scheme, pattern or other proprietary design elements are allowed in the body of report. The cover of the report may contain these elements.
4. Within the body of the report, at the bottom of each page, the name of the organization affiliated with the author(s) of the report may appear as long as the name of the Society of Actuaries also appears and the organization name is in a neutral (nonbranded) font and color.
5. It is expected that researchers will acknowledge the contribution of the Project Oversight Group within the body of report. In doing so, only the names of members of the Project Oversight Group should be noted with no reference to titles or company affiliation. Appropriate credentials are allowable and at the discretion of the author(s).
6. To avoid the possibility of commercialization, author biographies are not allowed within the body of a report. However, authors may include basic contact information either on the cover or within the body of the report.

Researchers may take the content of reports that they have authored, in their entirety, and format them for posting on their own organization's Web site and/or publication in applicable organization material. Acceptable formatting includes use of logos, design, style, etc., affiliated with a particular organization. The role of the Society of Actuaries, either by virtue of its funding or other support provided, should be acknowledged in the formatted report. Reprint permission should also be noted in the report, as applicable.

This policy applies to reports produced after May 2008.

Questions regarding this policy may be directed to the following members of the Society of Actuaries research department:

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