



James C. Hickman Scholar Doctoral Stipend Program Application 2021-2022 Academic Year

Application Deadline: February 15, 2021

Stipend will be paid in two installments: July 15, 2021 & December 15, 2021

Date:

Box 1: Contact Information

MR MS

1a. Last Name/Family Name

1b. First Name

1c. Middle Name

1d. Street or P.O. Box

1e. Date of Birth (mm/dd/yyyy)

1f. City

1g. State/Province

1h. Zip/Postal Code

1i. Country

1j. Business Phone

1k. Home Phone

1l. Cell Phone

1m. Email

Box 2: Doctoral Program Enrollment/Educational Institution

2a. 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 Boxes 2c-2g. If no, proceed to Box 2b.

2b. If **NOT** yet enrolled in a doctoral program, please provide the names of the schools/programs to which you applied and the intended field of study in each school/program. (Use an additional sheet of paper, if needed.)

2c. In what type of program are you enrolled? (e.g. Actuarial Science, Business, Financial Economics, Risk Management)

2d. Name of University (include city and state/province)

2e. Program start date

2f. Estimated completion date of program

2g. Program Supervisor/Director – Contact information:

Name

Title

Email

Phone

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. No electronic transcripts will be accepted.

Note: All required documentation must be sent from the school or official directly to Tiffany Tatsumi and received at the SOA office by the application deadline.

Box 3: 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. Applicants may apply for this stipend 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.

Note: All required documentation must be sent from the school or official directly to Tiffany Tatsumi and received at the SOA office by the application deadline.

Box 4: Actuarial Credential/Progress on Exams

4a. 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 the exam(s) you have passed with any of the following organizations: AI, CAS, CIA, IFoA, and SOA in Box 4b. Exams attempted, but not yet passed may also be listed (scores optional) in Box 4c. Those who have attained an Associateship need not list Associate-level exams. **Stipend recipients are expected to pursue a Fellowship credential, if not already attained.**



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4b. Exams Passed		4c. 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 Tiffany Tatsumi and received at the SOA office by the application deadline (address provided on page 2 of this application).

Box 5: Statement of Interest

Required documentation-Statement of Interest: Attach a Statement of Interest for your doctoral program that includes your goals regarding teaching, research, plans for future exam progress, and contributions to the actuarial profession. (Maximum length: 4-5 pages.)

Box 6: 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.)

6a. Are you a citizen or permanent resident of the United States or Canada? Yes No (If no, proceed to Box 6b)

If Yes, circle one: Citizen Permanent Resident What country?

6b. If you answered no in Box 6a, please indicate whether you have applied for citizenship or permanent residency with the United States or Canada and any future plans in this regard:

Box 7: Career Plans

7a. Do you intend to pursue an academic actuarial career in the United States or Canada?
(Circle one) Yes No Uncertain

7b. Please indicate your career plans after completing your PhD:

Required documentation – Résumé/CV: Include all actuarial-related work history and education.

Box 8: 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, 2021**. With the exception of the Statement of Interest and Résumé/CV, **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 Program Supervisor/ 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
- Résumé/CV
- Reference letters (3 recommended) – Applicants are encouraged to provide a reference from a credentialed actuary.

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:

Tiffany Tatsumi
Academic Administrator
Society of Actuaries
475 N. Martingale Road, Suite 600
Schaumburg, IL 60173-2226 U.S.A.
ttatsumi@soa.org
Fax: 847-273-8605

Questions regarding this application process should be directed to:

Tiffany Tatsumi at ttatsumi@soa.org



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SOA DOCTORAL STIPEND PROGRAM – PURPOSE

The SOA James C. Hickman Scholar 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, 2021.** Stipend recipients will be announced April 15, 2021. Recipients must notify the SOA of acceptance of the stipend by May 14, 2021.

AMOUNT OF STIPEND

Each stipend is generally \$20,000 (USD) per academic year, renewable up to two 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 SOA James C. Hickman Scholar 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 Application

Please PRINT all information on application form. Use an additional of paper as needed.

Box 1: CONTACT INFORMATION

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

Box 2: DOCTORAL PROGRAM ENROLLMENT/EDUCATIONAL INSTITUTION

Confirm whether or not you are currently enrolled in a qualifying doctoral program in the United States or Canada

- Current doctoral students may apply; however, preference will be given to students entering into or in the first year of a doctoral program.
- 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 or 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.

Box 3: 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 Tiffany Tatsumi and received at the SOA office by the application deadline** (address provided on page 2 of this application).

Additional Information for Completing Application (cont'd)

Box 4: 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. AI, CAS, CIA, IFoA, 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.

Box 5: 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.
- Maximum length: 4-5 pages.

Box 6: CITIZENSHIP

- The SOA James C. Hickman Scholar 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.

Box 7: CAREER PLANS

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

Box 8: 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 Résumé/CV, all required documentation must be sent directly from the school/organization or individual to the SOA to be received by the application deadline.)