



Centers of Actuarial Excellence

Application

January-June 2021 Review Cycle

IMPORTANT! *Information on the CAE criteria has been abbreviated for the purpose of this application.
Please read the [CAE A & B Criteria Guidance](#) thoroughly before preparing your application.*

Center of Actuarial Excellence
Application – January-June 2021 Review Cycle

APPLICATION DEADLINE: **January 11, 2021 (11:59 p.m. CDT)**

Submission Instructions

1. Please complete the following application, the required application worksheets, and any additional supporting documentation; and save into a **single** Portable Document Format (PDF) file with appropriate bookmarks.

Only the appendix D worksheet may be provided as a separate Excel file if preferred. All other documentation must be provided in the single PDF file.

2. Submit your application, application worksheets and any additional supporting documentation via email as a PDF attachment to cae@soa.org.
3. The **subject line** of the email should read as follows:

<UNIVERSITY NAME> – CAE Application

4. Applications will not be considered as having met the application deadline until the fully completed application and all required supporting documentation has been received by the SOA by January 11, 2021 (11:59 p.m. CDT).

Questions: Please contact Tiffany Tatsumi, Academic Administrator at (cae@soa.org).

Center of Actuarial Excellence Application

January-June 2021 Review Cycle

APPLICATION DEADLINE: **January 1, 2021 (11:59 p.m. CDT)**

This form is for universities and colleges with actuarial science programs seeking a Society of Actuaries' (SOA) Center of Actuarial Excellence (CAE) designation.

I. Educational Institution

Name of institution:			
Institution website address:		Name of school where actuarial program is housed:	
Actuarial program website address:			
Mailing address:			Campus box or mail code (if applicable) :
City:	State/Province:	Postal code:	Country:
Telephone number:	Fax number:	E-mail address:	
Name of the chair of the actuarial science program:			
Primary contact for the purpose of this application (if different than above):			
Primary contact information mailing address (if different than above):			Campus box or mail code (if applicable)
City	State/Province	Postal code	Country
Telephone number	Fax number	E-mail address	
Please list all dates that would work well for a two-day site visit within the following date range (weekdays only): March 1-May 14 NOTE: If a site visit is awarded, this is the earliest time frame during which a site visit may be conducted. Site visits will be conducted at the SOA's sole discretion, contingent upon factors such as the ability to safely travel and participate in face-to-face meetings on campus.			

IMPORTANT! Information on the CAE criteria has been abbreviated for the purpose of this application. Please read the [CAE A & B Criteria Guidance](#) thoroughly before preparing your application.

Note: Links appear in this application to the [CAE A & B Criteria Guidance](#) documents.

Within the guidance documents you will find links to the appendices and worksheets required for each criterion. There are some instances where one worksheet can serve as supporting data for multiple criteria. Any supporting documentation or explanation in addition to that which is specifically requested is welcome.

II. A-Level Criteria - Schools must pass each A-level criterion.

Criterion A.1: The school must offer a program with an identifiable major or track (the term “major” will henceforth be used to refer to all actuarial programs) in actuarial science. <i>For guidance on this criterion, see the bookmark for Criterion A.1 in the A-Criteria Guidance.</i>
Criterion A.2: The curriculum of the actuarial major must cover at least 80% of the learning objectives per examination in 4 of the 6 preliminary exams offered by the SOA (exams P, FM, IFM, STAM, LTAM, and SRM) with at least one exam being STAM or LTAM. <i>For guidance on this criterion, see the bookmark for Criterion A.2 in the A-Criteria Guidance. The Appendix B worksheet is required.</i>
Criterion A.3: The school must have produced an average of no fewer than ten graduates per year over the previous four years across all identifiable actuarial science majors. <i>For guidance on this criterion, see the bookmark for Criterion A.3 in the A-Criteria Guidance.</i>
Criterion A.4: The faculty responsible for actuarial courses and other program involvement must be sufficient in both quantity and qualifications. At least one faculty member must be full-time, tenured or tenure-track, and must be a credentialed actuary or pursuing actuarial credentials (Associate or Fellow). <i>For guidance on this criterion, see the bookmark for Criterion A.4 in the A-Criteria Guidance. The Appendix C worksheet is required.</i>

III. B-Level Criteria - Schools must meet the B-Level criteria. The B criteria are first evaluated by the CAE Evaluation Committee (CEC) and, should a school be granted a site visit, evaluated by the Site Visit team in more detail.

Criterion B.1: The program should produce high-quality graduates who are in demand by employers. <i>For guidance on this criterion, see the bookmark for Criterion B.1 in the B-Criteria Guidance. Submission of the appendix D worksheet is strongly recommended. If not, a similar report must be submitted.</i>
Criterion B.2: There must be an appropriate integration with other relevant fields, particularly those developing business skills and communication. <i>For guidance on this criterion, see the bookmark for Criterion B.2 in the B-Criteria Guidance. Submission of the appendix D worksheet is strongly recommended.</i>
Criterion B.3: To earn a CAE designation a connection to industry must exist through activities such as an advisory board, campus speakers, career center, internship program, and actuarial club. <i>For guidance on this criterion, see the bookmark for Criterion B.3 in the B-Criteria Guidance. Submission of the appendix D worksheet is strongly recommended.</i>
Criterion B.4: The program should be producing research and professional contributions . <i>For guidance on this criterion, see the bookmark for Criterion B.4 in the B-Criteria Guidance.</i>

IV. Submission of Application

Note: Should the school be granted a site visit, a Site Visit Fee will be due 10 days prior to the first date of the visit.

- **Applicants in North America: \$3,000 USD**
- **Applicants outside North America: \$7,500 USD**

By signing below, each of the individuals listed below certifies that (i) the information provided in this application and its attachments is true, accurate, and complete to the best of his or her knowledge and belief; and (ii) he or she will inform the SOA of any material changes in the information provided in this application. Each of the undersigned understands and acknowledges that any false or misleading information may result in revocation of the designation.

Chair of Actuarial Program

Date

Dean presiding over Actuarial Program

Date

This application form and supporting documentation should be sent via email to cae@soa.org.

For guidance on how to submit your application and supporting documentation, please see Submission Instructions on Page 2 of this document.

Questions: Please contact Tiffany Tatsumi, Academic Administrator at (cae@soa.org).