

## Fall 2011 FSA Exams Textbook List

<b>Advanced Finance/ERM (AFE)</b>
<i>Asset/Liability Management of Financial Institutions: Maximising Shareholder Value Through Risk-Conscious Investing</i> , Tilman, L.M., Euromoney Institutional Advisor
<i>Corporate Value of Enterprise Risk Management</i> , Segal, S. 2011, John Wiley & Sons
<i>Credit Risk Measurement In and Out of the Financial Crisis</i> , Saunders, A., Allen, L., Third Edition, 2010, John Wiley & Sons
<i>Financial Statement Analysis: A Practitioner's Guide</i> , Fridson, M, Alvarez, F., Fourth Edition, 2011, John Wiley & Sons (Candidates may also use Third Edition, 2002)
<i>Investment Guarantees: Modeling and Risk Management for Equity-Linked Life Insurance</i> , Hardy, M.R., 2003, John Wiley & Sons Errata: <a href="http://www.stats.uwaterloo.ca/Faculty/erratum.pdf">http://www.stats.uwaterloo.ca/Faculty/erratum.pdf</a>
<i>Life, Health and Annuity Reinsurance</i> , Tiller, J.E., Tiller, D.F., Third Edition, 2005, ACTEX
<i>Strategic Risk Management Practice</i> , Anderson, T.J., Schroder, P.W., 2010, Cambridge University Press
<i>Variable Annuities</i> , Kalberer, T., Ravindran, K., 2009, Incisive Media
<b>Financial Economic Theory &amp; Engineering (FETE)</b>
<i>Financial Theory and Corporate Policy</i> , Copeland, T.E., Weston, J.F., Shastri, K., (Fourth Edition), 2005, Pearson/Addison Wesley
<i>Insurance Industry Mergers &amp; Acquisitions</i> , Toole, J., Herget, T., 2005, Society Of Actuaries
<i>Investment Guarantee: Modeling and Risk Management for Equity-Linked Life Insurance</i> , Hardy, M.R., 2003, John Wiley & Sons Errata: <a href="http://www.stats.uwaterloo.ca/Faculty/erratum.pdf">http://www.stats.uwaterloo.ca/Faculty/erratum.pdf</a>
<i>Options, Futures and Other Derivatives</i> , Hull, J.C., (Eighth Edition), 2012, Prentice Hall/Pearson Education (Candidates may also use 7 <sup>th</sup> Edition, 2008)

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<b>Group and Health Design and Pricing (DP-GH)</b>
<i>Canadian Handbook of Flexible Benefits</i> , McKay, R., J. (Third Edition), 2007, John Wiley & Sons
<i>Fundamentals of Retiree Group Benefits</i> , Yamamoto, D.H., 2006, ACTEX Errata: <a href="http://www.actexmadriver.com/client/client_pages/actex_errata2.cfm">http://www.actexmadriver.com/client/client_pages/actex_errata2.cfm</a>
<i>Group Insurance</i> , Bluhm, W.F., (Fifth Edition), 2007, ACTEX Errata: <a href="http://www.actexmadriver.com/client/client_pages/actex_errata2.cfm">http://www.actexmadriver.com/client/client_pages/actex_errata2.cfm</a>
<i>Individual Health Insurance</i> , Bluhm, W.F., 2007, ACTEX Errata: <a href="http://www.actexmadriver.com/client/client_pages/actex_errata2.cfm">http://www.actexmadriver.com/client/client_pages/actex_errata2.cfm</a>
<i>Managing and Evaluating Healthcare Intervention Programs</i> , Duncan, I., 2008, ACTEX Errata: <a href="http://www.actexmadriver.com/client/client_pages/actex_errata2.cfm">http://www.actexmadriver.com/client/client_pages/actex_errata2.cfm</a>
<i>The Handbook of Employee Benefits</i> , Rosenbloom, J.S., (Seventh Edition), 2011, McGraw Hill (Candidates may also use Sixth Edition, 2005)
<b>Individual Life and Annuities Design and Pricing U.S. (DP-IU)</b>
<i>Investment Guarantees – Modeling and Risk Management for Equity-Linked Life Insurance</i> , Hardy, M.R., 2003, John Wiley & Sons Errata: <a href="http://www.stats.uwaterloo.ca/Faculty/erratum.pdf">http://www.stats.uwaterloo.ca/Faculty/erratum.pdf</a>
<i>Insurance Marketing</i> , Allen-Peterson, S.B., Head, K., Silver, S., 2010, LOMA
<i>Life Insurance Modified Endowments Under Internal Revenue Code Sections 7702 and 7702A</i> , DesRochers, C.J., 2004, Society Of Actuaries Supplement: <a href="http://www.soa.org/files/pdf/2008-life-ins-mod-end-supplement.pdf">http://www.soa.org/files/pdf/2008-life-ins-mod-end-supplement.pdf</a>
<i>Life Insurance Products and Finance</i> , Atkinson, D., Dallas, J., 2000, Society Of Actuaries
<i>Marketing for Actuaries</i> , LaPorte, P., 2000, LIMRA
<b>Individual Life and Annuities Design and Pricing, Canada (DP-IC)</b>
<i>Canadian Taxation of Life Insurance</i> , Marino, F., Grobe, G., (Fifth Edition), 2010, Thomson Carswell
<i>Investment Guarantees – Modeling and Risk Management for Equity-Linked Life Insurance</i> , Hardy, M.R. 2003, John Wiley & Sons Errata: <a href="http://www.stats.uwaterloo.ca/Faculty/erratum.pdf">http://www.stats.uwaterloo.ca/Faculty/erratum.pdf</a>
<i>Insurance Marketing</i> , Allen-Peterson, S.B. Head, K., Silver, S., 2010, LOMA
<i>Life Insurance Products and Finance</i> , Atkinson, D., Dallas, J., 2000, Society Of Actuaries
<i>Marketing for Actuaries</i> , LaPorte, P., 2000, LIMRA

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<b>Retirement Benefits U.S. (DP-RU)</b>
<i>Fundamentals of Private Pensions</i> , McGill, D.M (Ninth Edition), 2010, Oxford Press
<i>Fundamentals of Retiree Group Benefits</i> , Yamamoto, D.H., 2006, ACTEX
Errata: <a href="http://www.actexmadriver.com/client/client_pages/actex_errata2.cfm">http://www.actexmadriver.com/client/client_pages/actex_errata2.cfm</a>
<i>Pension Policy: The Search For Better Solutions</i> , Turner, J., 2010, W.E. Upjohn Institute for Employment
<i>Retirement Plans: 401(k)s, IRAs, and Other Deferred Compensation Approaches</i> , Allen, E.T., Tenth Edition, 2008, McGraw-Hill Irwin
<b>Retirement Benefits Canada (DP-RC)</b>
<i>Canadian Pensions and Retirement Income Planning</i> , Towers Watson (Fourth Edition), 2009, CCH
<i>Fundamentals of Retiree Group Benefits</i> , Yamamoto, D.H., 2006, ACTEX
Errata: <a href="http://www.actexmadriver.com/client/client_pages/actex_errata2.cfm">http://www.actexmadriver.com/client/client_pages/actex_errata2.cfm</a>
Morneau Sobeco <i>Handbook of Canadian Pension and Benefit Plans</i> , (Fourteenth Edition), 2008, CCH Canadian
<i>Pension Mathematics for Actuaries</i> , (Third Edition), Anderson, A.W., 2006, ACTEX
<i>Pension Policy: The Search For Better Solutions</i> , Turner, J., 2010, W.E. Upjohn Institute for Employment
<i>Retirement Plans: 401(k)s, IRAs, and Other Deferred Compensation Approaches</i> , Allen, E.T., Tenth Edition, 2008, McGraw-Hill Irwin

## Fall 2011 FSA Exams Textbook List

<b>Advanced Portfolio Management (APM)</b>
<i>Asset/Liability Management of Financial Institutions: Maximising Shareholder Value Through Risk-Conscious Investing</i> , (Also available in Complete study notes as study note V-C193-10) Tilman, L.M., 2003, Euromoney Institutional Investor
<i>Handbook of Fixed Income Securities</i> , Fabozzi, F.J., Seventh Edition, 2005, McGraw-Hill
<i>Investment Management for Insurers</i> , Babbel, D., Fabozzi, F.J., 1999, Frank J. Fabozzi & Assoc.
<i>Managing Investment Portfolios</i> , Maginn, J.L., Tuttle, D.L., Third Edition, 2007, John Wiley & Sons
<i>Modern Investment Management: An Equilibrium Approach</i> , Litterman, R., 2003, John Wiley & Sons
<i>Risk Management</i> , Crouhy, M., Galai, D., Mark, R., 2001, McGraw Hill

<b>Group and Health CSP (CSP-GH)</b>
<i>Analysis for Financial Management</i> , Higgins, R.C., Ninth Edition, 2008, McGraw-Hill/Irwin
<i>Enterprise Risk Management: From Incentives to Controls</i> , Lam, J., 2003, John Wiley & Sons
<i>Fundamentals of Retiree Group Benefits</i> , Yamamoto, D., 2006, ACTEX Errata: <a href="http://www.actexamdriver.com/client/client_pages/actex_errata2.cfm">http://www.actexamdriver.com/client/client_pages/actex_errata2.cfm</a>
<i>Group Insurance</i> , Bluhm, W.F., Fifth Edition, 2007, ACTEX Errata: <a href="http://www.actexamdriver.com/client/client_pages/actex_errata2.cfm">http://www.actexamdriver.com/client/client_pages/actex_errata2.cfm</a>
<i>Individual Health Insurance</i> , Bluhm, W.F., 2007, ACTEX Errata: <a href="http://www.actexamdriver.com/client/client_pages/actex_errata2.cfm">http://www.actexamdriver.com/client/client_pages/actex_errata2.cfm</a>
<i>Managed Health Care Handbook</i> , Kongstvedt, P.R., Fourth Edition, 2001, Jones and Bartlett Publishers
<i>Managing and Evaluating Healthcare Intervention Programs</i> , Duncan, I., 2008, ACTEX
<i>The Handbook of Employee Benefits</i> , Rosenbloom, J.S., Seventh Edition, 2011 (Candidates may also use Sixth Edition, 2005, McGraw-Hill)
<i>U.S. GAAP for Life Insurers</i> , Herget, T., Second Edition, 2006, SOA Errata: <a href="http://www.soa.org/files/pdf/Errata%20GAAP%20Text%202nd%20Edition%2010%20Mar%2006.pdf">http://www.soa.org/files/pdf/Errata%20GAAP%20Text%202nd%20Edition%2010%20Mar%2006.pdf</a>

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<b>Individual Life and Annuities, CSP, U.S. (CSP-IU)</b>
<i>U.S. GAAP for Life Insurers</i> , Herget, T., Second Edition, 2006, SOA Errata: <a href="http://www.soa.org/files/pdf/Errata%20GAAP%20Text%202nd%20Edition%2010%20Mar%2006.pdf">http://www.soa.org/files/pdf/Errata%20GAAP%20Text%202nd%20Edition%2010%20Mar%2006.pdf</a>
<i>Life, Health &amp; Annuity Reinsurance</i> , Tiller, J.E., Tiller, D.F., Third Edition, 2005, ACTEX
<i>Life Insurance Products and Finance</i> , Atkinson, D., Dallas, J., 2000, SOA
<i>Valuation of Life Insurance Liabilities</i> , Lombardi, L., Fourth Edition, 2006, ACTEX Errata: <a href="http://www.actexmadriver.com/client/client_pages/actex_errata2.cfm">http://www.actexmadriver.com/client/client_pages/actex_errata2.cfm</a>
<b>Individual Life and Annuities, CSP, Canada (CSP-IC)</b>
<i>Canadian Insurance Taxation</i> , PriceWaterhouseCoopers, Third Edition, 2009, Butterworths Canada LTD
<i>Life Insurance Products and Finance</i> , Atkinson, D., Dallas, J., 2000, SOA
<i>Life, Health &amp; Annuity Reinsurance</i> , Tiller, J.E., Tiller, D.F., Third Edition, 2005, ACTEX
<i>Valuation of Life Insurance Liabilities</i> , Lombardi, L., Fourth Edition, 2006, ACTEX Errata: <a href="http://www.actexmadriver.com/client/client_pages/actex_errata2.cfm">http://www.actexmadriver.com/client/client_pages/actex_errata2.cfm</a>

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<b>Retirement CSP U.S. (CSP-RU)</b>
<i>Fundamentals of Private Pensions</i> , McGill, D.M., Brown, K.N., Haley, J.J., Schieber, S.J., Ninth Edition, 2010, Oxford Press
<i>Fundamentals of Retiree Group Benefits</i> , Yamamoto, D., 2006, ACTEX Errata: <a href="http://www.actexmadriver.com/client/client_pages/actex_errata2.cfm">http://www.actexmadriver.com/client/client_pages/actex_errata2.cfm</a>
<i>Handbook of Canadian Pension &amp; Benefit Plans</i> , Morneau Sobeco, Fourteenth Edition, 2008, CCH Canadian
<i>Modern Investment Management: An Equilibrium Approach</i> , Litterman, R., 2003, John Wiley & Sons
<i>Pensions in the Public Sector</i> , Mitchell, O.S., Hustead, E.C., 2001, University of PA Press
<i>Retirement Plans –401(k), IRAs and Other Deferred Approaches</i> , Allen, E.T., Malone, J.J., Rosenbloom, J.S., Mahoney, D.F., Tenth Edition, 2008, McGraw-Hill
<b>Retirement CSP Canada (CSP-RC)</b>
<i>Canadian Pensions and Retirement Income Planning</i> , Towers Watson, Fourth Edition, 2009, CCH Canada Limited
<i>Employee Future Benefits – Additional Disclosures, Background Information and Basis for Conclusion</i> , Includes Section 3461 from the <i>CICA Handbook – Accounting</i> , 2004, CICA
<i>Fundamentals of Private Pensions</i> , McGill, D.M., Brown, K.N., Haley, J.J., Schieber, S.J., Ninth Edition, 2010, Oxford Press
<i>Fundamentals of Retiree Group Benefits</i> , Yamamoto, D., 2006, ACTEX Errata: <a href="http://www.actexmadriver.com/client/client_pages/actex_errata2.cfm">http://www.actexmadriver.com/client/client_pages/actex_errata2.cfm</a>
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