

American Society of Enrolled Actuaries (ASEA) Application for Credentialed Membership Reinstatement

Apply Now!
Questions?
Call 800-308-6714

All members must meet JBEA requirements. Membership in ASEA must be renewed annually to retain credentials.

Mr./Mrs./Ms. Name: _____
(circle one) First MI Last (former name)

Company: _____ Company Owner's Name(s): _____
(provide company name, even if home address is noted below)

Title: _____ I am the owner

Street Address: _____

City: _____ State: _____ Zip Code: _____

Home Business

Work Phone: _____ Fax: _____

Home Phone: _____ Home Zip Code (for government affairs purposes): _____

Work Email Address: _____ Date of Birth: _____

Personal Email Address: _____

Application for:

MSPA (Member, Society of Pension Actuaries)

FSPA (Fellow, Society of Pension Actuaries)

MSEA (Member, Society of Enrolled Actuaries)

FSEA (Fellow, Society of Enrolled Actuaries)

JBEA Enrollment No: _____

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Which professional Credential(s) do you hold?

ACA

EA

FCAS

ASA

CERA

FSA

ACAS

FCA

MAAA

Which position best describes your work?

Accountant/Plan Auditor

Attorney

TPA / Plan Administrator

Actuary

Home Office (BD, RIA, DCIO)

Wholesaler (External)

Advisor 401(k)

Institutional Trainer

Other: _____

Advisor — 403(b) / 457 Plan

Recordkeeper

Which business most closely describes your place of employment?

Accounting

Government Entity

Legal

Actuarial / Employee Benefits

Human Resources

Mutual Fund / DCIO

Bank / Savings & Loan

Industry Training

Plan Sponsor

Brokerage

Insurance Agency

Recordkeeper

Computer / Software

Insurance Provider

TPA

Consulting

Investment Consulting

TPA – Producing

Educational Institution

Investment Provider

Other: _____

I understand that to be considered for FSPA / FSEA or MSPA / MSEA membership in the American Society of Enrolled Actuaries (ASEA) and the American Society of Pension Professionals & Actuaries (ASPPA) I must be an enrolled actuary in good standing with JBEA, have high ethical standards and must not be under investigation(s) or have had sanctions imposed against me by the Actuarial Board for Counseling and Discipline (ABCD). I hereby give my consent to the ASPPA to verify my status with the ABCD. I further understand that my membership application/reinstatement may be rejected or put on hold if I am under investigation by the ABCD or pending a disciplinary proceeding by any other ABCD organization.

Signature: _____ Date: _____

Code of Conduct:

Have you been found guilty of a felony, violation of insurance or securities regulations or any violation of the code of ethics of any professional or business organization?

No Yes (If yes, explain on a separate attachment.)

I have read the ASPPA Code of Professional Conduct and the Code of Professional Conduct for Actuaries. If my application is accepted I agree to abide thereby. I certify that the information provided in this application is true and correct to the best of my knowledge. (If you do not have a copy of the ASPPA Code of Professional Conduct, please call the ASEA office at 703.516.9300 to request one.)

Signature: _____ Date: _____

Payment Information:

Payment Date:

Jan. 1-Jun. 30
Jul. 1-Oct. 31
Nov. 1-Dec. 31

Dues Payment:

\$750 (dues through 12/31) \$100 Retired or Government Employee (dues through 12/31)
 \$375 (dues through 12/31) \$100 Reinstatement Fee
 \$750 (includes next year's dues)

I am paying by

Check Money Order Mastercard Visa Amex Discover

Name as it appears on card: _____

Card No.: _____ Exp.Date: _____

Signature: _____

Remit Payments:

Paying by check? Please send your completed application to: ASPPA, P.O. Box 34725, Alexandria, VA, 22334-0725.

Paying by credit card? Please fax your completed application to 703.516.9308 or email accountsreceivable@usaretirement.org.

Dues appearing on this application are not valid after December 31, 2024.

Questions? Please call us at 800.308.6714.

Tax Deductions:

Dues, contributions or gifts to ASEA are not deductible as charitable contributions; they may be deductible, however, as ordinary and necessary business expenses. Federal law prohibits a tax deduction for the portion of membership dues attributable to lobbying expenses incurred by the organization. Consequently, for 2024, 15% of your dues are non-deductible in accordance with this provision.



4401 North Fairfax Drive, Suite 600
Arlington, VA 22203
P 703.516.9300 F 703.516.9308
www.asppa-net.org/asea