

Audio/Webcast Options and Fees for 2017 Four Page Policy Document (12/2016)

The Conference of Consulting Actuaries' ("CCA") Board of Directors approved the following fee structure for 2017 audio/webcasts sponsored by CCA.

Individuals – One Attendee on One Connection in One Location

Single Audio/Webcast and CCA Member Only Individual Subscription*

	2017 Regular Fees	2017 Fees One Week out
Single Audio/webcast		
CCA Member	\$170	\$220
Nonmember	\$280	\$330
CCA Member and U.S. Federal Government Employee	\$85	\$135
U.S. Federal Government Employee	\$140	\$190
Individual Subscription*		
CCA Member	\$640	Not Applicable
Nonmember	Not Available	Not Applicable
CCA Member and U.S. Federal Government Employee	\$320	Not Applicable
U.S. Federal Government Employee	Not Available	Not Applicable

Individual Process

Registration: The attendee must register with the CCA. To register for a single audio/webcast or for a subscription*, please submit the appropriate payment through the CCA website. If registration for a subscription* occurs after any audio/webcast have occurred in a given year, the full year subscription price is due for the remaining audio/webcasts (unless otherwise noted). Confirmations are automatically generated through the website upon registration.

CCA Member Rate: The attendee must be a CCA member for the current year (dues paid in full) to qualify for the CCA member rate.

U.S. Federal Government Employee Rates: The attendee must be a current U.S. Federal government employee to qualify for the government rate.

***Subscription:** The CCA Board of Directors reserves the right to revise the audio/webcast schedule, including substitutions of session topics and content, and ensures a minimum of 10 audio/webcasts.

Participation Instructions: An e-mail will be forwarded to the registrant, generally on the Monday before the audio/webcast, containing a PDF version of the presentation, participation and certificate request instructions, and a link to a personalized authorization that allows the attendee to connect to the web conferencing service. Once this authorization process is completed, the attendee will receive a confirmation with the link for the live webcast, as well as the call-in instructions.

****Certificate of Attendance:** Within two days after the presentation date, the attendee must submit the Individual Participation Form via e-mail to conference@ccactuaries.org in order to confirm his/her attendance at the presentation. If the individual is requesting formal EA credit, the Individual Participation Form must contain the names of at least three people who are substantially engaged in pension service who were in the same physical location throughout the presentation.

Cancellation Policy: Cancellations for a single audio/webcast received in writing a minimum of 7 calendar days prior to the audio/webcast will be refunded the full fee minus a \$50 processing fee. After that date, no refunds are available. There are no cancellations or credits on unused subscriptions* or duplicate purchases within one firm.

About EA Continuing Education Credits: Please note that the proposed credits for all events listed here are subject to the final approval of the Joint Board for the Enrollment of Actuaries. When filing for renewal of enrollment with the JBEA or other credentialing organizations, it is the individual's responsibility to determine any redundancy of topics and/or content between the sessions attended for each renewal period. As the sponsor of continuing education, we try to note sessions that might have significant overlap, but the ultimate responsibility for claiming credits rests with the individual actuary.

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Groups – Three or More Attendees on One Connection in One Location

Single Audio/Webcast

	2017 Regular Fees	2017 Fees One Week out
CCA Members	\$380	\$430
Nonmembers	\$760	\$810
CCA Member and U.S. Federal Government Employee	\$190	\$240
U.S. Federal Government Employee	\$380	\$430

Group Process

Registration: The responsible contact at each group location must register with the CCA. To register for the audio/webcast, please submit the appropriate payment through the CCA website. Confirmations will be automatically generated through the website upon registration.

CCA Member Rate: The responsible contact for the group must be registered by a current CCA member (dues paid in full) to qualify for the CCA member rate.

U.S. Federal Government Employee Rate: The attendee must be a current U.S. Federal government employee to qualify for the government rate.

Participation Instructions: An e-mail will be forwarded to the responsible contact, generally on the Monday before the audio/webcast, containing a PDF version of the presentation, participation and certificate request instructions, and a link to a personalized authorization that allows the contact to connect to the web conferencing service for use with **one connection from one location**. Once this authorization process is completed, the contact will receive a confirmation with the link for the live webcast, as well as the call-in instructions.

Deadlines for Request for Certificates of Attendance and Payment of Certificate Fees:** The responsible contact must submit the Group Participation Form, request certificates** for all group participants online and pay \$30/nonmember certificate** requested within two business days following the conclusion of the audio/webcast. Certificates** are \$30/nonmember and free to CCA members. Fees are due at the time the request for certificates** is made. To submit the names for certificates**, submit the completed Group Participation Form via e-mail to conference@ccactuaries.org and submit payment for any requested certificates through the following process:

- The responsible contact who originally registered for the presentation logs into the CCA website: <http://www.ccactuaries.org>
- Select the audio/webcasts from the “Past Programs” list,
- Use the “Register Group” function to select names online.
- If the organizer needs a certificate**, the organizer selects “Yes” for the “Register Me as part of the group?” question prior to selecting names of other participants for certificates**.
- Select names of all participants who require certificates** of attendance. “Search by Name” and “Add New Contact” (for those not included on listing) functions are available.
- Payment of \$30 for each **nonmember** certificate** is required at the time certificate** requests are submitted. Certificate** requests are not fully processed without payment for nonmember certificates**.
- Participant names must be entered and appropriate fees must be paid and fully processed within two business days after the presentation has concluded. Any records not fully processed will be automatically deleted and cannot be recreated.

Cancellation Policy: Cancellations for audio/webcasts only once received in writing at least 7 calendar days prior to the audio/webcast will be refunded the full fee minus a \$50 processing fee. After that date, no refunds are available.

About EA Continuing Education Credits: Please note that the proposed credits for all events listed here are subject to the final approval of the Joint Board for the Enrollment of Actuaries. When filing for renewal of enrollment with the JBEA or other credentialing organizations, it is the individual’s responsibility to determine any redundancy of topics and/or content between the sessions attended for each renewal period. As the sponsor of continuing education, we try to note sessions that might have significant overlap, but the ultimate responsibility for claiming credits rests with the individual actuary.

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Company Subscription* – All Locations for a Single Company

Firm Size	2017 Fees
Small Firm Subscriptions* <i>Companies that have 49 or fewer U.S.-based actuaries.</i>	The fees for a company-wide, small firm subscription* is \$4,370 based on the number of U.S.-based actuaries for companies employing 49 or fewer actuaries.
Mid-size Firm Subscriptions* <i>Companies that have 50 - 100 U.S.-based actuaries.</i>	The fees for a company-wide, mid-size firm subscription* is \$8,745 based on the number of U.S.-based actuaries for companies employing 50 - 100 actuaries.
Company Subscriptions for Large Firms* <i>All other companies that have 101 or more U.S.-based actuaries.</i>	The fees for a company-wide large firm subscription* are calculated based on the number of U.S.-based actuaries employed by the company. Subscription fees are specific to each company, and subject to a minimum of \$13,110 and a maximum of \$39,335 , as follows: 101 – 500 actuaries: \$13,110 501 – 750 actuaries: \$26,225 751 or more actuaries: \$39,335

Company Subscription* Process

Registration: By the middle of January, the company's contact person should call the CCA to establish himself or herself as the contact person for the company. One alternate contact person should also be designated. It is assumed that the appropriate fee is paid by the middle of January. +

Participation Instructions: One call-in line will be provided to the contact person who will bridge the call-in line to the company's internal conference call line. Individuals at the company attending the audio/webcast may call into the **company's internal conference call line*****. The company is responsible for coordinating the attendance of individuals or groups. An e-mail is forwarded to the contact person, generally on the Monday before the audio/webcast, containing a PDF version of the presentation, participation and certificate request instructions, and a link to a personalized authorization that will allow the contact person to connect to the web conferencing service. Once this authorization process is completed, the contact person will receive a confirmation with the link for the live webcast, as well as the call-in instructions.

Deadlines for Requests for Certificates of Attendance and Payment of Certificate Fees:** The contact person must request certificates** for all group participants online and pay \$30/nonmember certificate** requested within two business days after the conclusion of the audio/webcast. To submit the names for certificates**, submit the completed Group Participation Form via e-mail to conference@ccactuaries.org and submit payment for any requested certificates through the following process:

- The responsible contact for the company must login to the CCA website, <http://www.ccactuaries.org>
- Select the audio/webcast from the "Past Programs" list,
- Use the "Register Group" function to select names online.
- If the contact person needs a certificate**, the contact person selects "Yes" for the "Register Me as part of the group?" question prior to selecting names of other participants for certificates**.
- Select names of those participants who require certificates** of attendance "Search by Name" and "Add New Contact" functions are available.
- Payment of \$30 for each **nonmember** certificate** is required at the time certificate** requests are submitted. Certificate** requests are not processed without payment for nonmember certificates**.
- Participant names must be entered and appropriate fees must be paid and fully processed within two business days after the presentation has concluded. Any records not fully processed will be automatically deleted and cannot be recreated.

Fees and Deadlines for Payment: Subscription* fees should be submitted no later than the middle of January. Company subscriptions* are payable by check only to the CCA office, 3880 Salem Lake Drive, Suite H, Long Grove, IL 60047.

Cancellation Policy: There are no cancellations or credits on unused company subscriptions*, or certificates**.

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*Subscription(s): The CCA Board of Directors reserves the right to revise the audio/webcast schedule, with substitutions of session topics and content and ensures a minimum of 10 audio/webcasts.

**Certificates: Note that a request for issuance of a certificate of attendance is received from the responsible contact who acknowledges that individuals listed have attended the audio/webcast.

*****Company's internal conference call line:** This process has been previously tested, but the company must have adequate capacity on its internal conference call line to provide adequate access to all of their individuals who plan to attend the audio/webcast.

Purchasing a Company Subscription*

+ Company subscriptions* are payable by check only. However, payments of \$12,000 or more may be submitted in two installments, each equal to 50% of the full year's subscription fee; the first payment is due no later than January 15th of the subscription year; and final payment is due by June 1st of the subscription year.

The registration for a company subscription* should be submitted by no later than January 15th of the subscription year.