

American Society of Pension Professionals & Actuaries

Application for Credentialed Membership Upgrade/Addition

Join Now!
Questions?
Call 800-308-6714

All credentialed members are subject to continuing professional education requirements of 40 credits each two-year cycle; including 2 credits in ethics. Membership in ASPPA must be renewed annually to retain credentials. For exceptions, please refer to the ASPPA Continuing Education (CE) page at www.asppa-net.org.

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): _____

Email Address: _____ Date of Birth: _____

Current ASPPA Credential(s) held or Affiliate Membership:

- FSPA CPC QKA TGPC Affiliate
 MSPA QPA QPFC/CPFA APM

Application for:

- FSPA (Fellow, Society of Pension Actuaries) QKA (Qualified 401(k) Administrator)
 MSPA (Member, Society of Pension Actuaries) APM (Associated Professional Member)
 JBEA Enrollment No: _____ I am an Attorney (Jurisdiction: _____)
 CPC (Certified Pension Consultant) I am a CPA (Jurisdiction: _____)
 I am an APA (Accredited Pension Administrator) QPFC (Qualified Plan Financial Consultant)
 QPA (Qualified Pension Administrator) CPFA (Certified Plan Fiduciary Advisor)
 I am an ERPA (IRS ERPA Enrollment No: _____) TGPC (Tax Exempt & Government Plan Consultant)

Which professional credentials do you hold? (Choose all that apply)

- AAMS ARPC CFA CIMA CRA CRSP FCA MSFS RIA
 AEP ARPS CFP CLU CRC EA FSA PFS RP
 APA ASA CFS CMFC CRPC ERPA MAAA RFC Other: _____
 APR CEBS ChFC CPA CRS Esq MCRS RFP _____

Which position best describes your work?

- Accountant/Plan Auditor Advisor — 403(b)/457 Plan Institutional Trainer Wholesaler (External)
 Actuary Attorney Recordkeeper Other: _____
 Advisor — 401(k) Home Office (BD, RIA, DCIO) TPA/Plan Administrator _____

Which business most closely describes your place of employment?

- Accounting Educational Institution Investment Consulting TPA
 Actuarial/Employee Benefits Government Entity Investment Provider TPA — Producing
 Bank/Savings & Loan Human Resources Legal Other: _____
 Brokerage Industry Training Mutual Fund/DCIO _____
 Computer/Software Insurance Agency Plan Sponsor _____
 Consulting Insurance Provider Recordkeeper _____

Please indicate the SEC or state insurance licenses you currently hold:

- Series 6 Series 7 Series 65 State life or annuity insurance license: _____
State License number

