

**Candidate Information**

Mr.  Mrs.  Ms.  None

Name to be printed on badge: \_\_\_\_\_

Company Name: \_\_\_\_\_

Company Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email Address: \_\_\_\_\_

Male \_\_\_\_\_ Female \_\_\_\_\_ X \_\_\_\_\_ Date of Birth: \_\_\_\_\_

**PEC Track Selection**

- Retirement Benefits (RET)       Individual Life and Annuities (ILA)  
 Finance and Investments (FIN)    Enterprise Risk Management (ERM)    Property and Casualty (P&C)

- Conventional Primary Route (one Fellow-level track-specific exam required, with 2 years of experience)  
 Conventional Alternate Route (at least 36 months of track-relevant Canadian experience in last 4 years)  
 MRA/Affiliate Primary Route (at least 36 months of track-relevant Canadian experience in last 4 years)  
 MRA/Affiliate Alternate Route (one Fellow-level track-specific exam required, with 2 years of experience)

**Educational Background**

- SOA RET    SOA GH    SOA ILA    SOA QFI    SOA CFE    CAS P&C  
 Mutual Recognition (MRA) or other, please specify:

**Bilingual Option**

If available, do you prefer to be part of a French-speaking session? (You will be notified if a French session will be offered.)       Yes       No

**Certification**

I am enclosing proof of credit for the required education, examinations, and experience.

**Candidate Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**For CIA use ONLY:**

Candidate # \_\_\_\_\_ Batch Date: \_\_\_\_\_ Cheque # \_\_\_\_\_

**PEC Application – Academic Record and Checklist**

Please indicate completed academic activities:

PEC Requirements – Conventional Route		PEC Requirements – MRA or Affiliate Route
<b>Indicate your PEC Track:</b> <input type="checkbox"/> FIN <input type="checkbox"/> ILA <input type="checkbox"/> RET <input type="checkbox"/> ERM <input type="checkbox"/> P&C	<b>Indicate your Educational Track:</b> <input type="checkbox"/> SOA CFE/ERM <input type="checkbox"/> SOA QFI <input type="checkbox"/> SOA ILA <input type="checkbox"/> SOA RET <input type="checkbox"/> SOA GH <input type="checkbox"/> CAS P&C	<b>Indicate your PEC Track:</b> <input type="checkbox"/> FIN <input type="checkbox"/> ILA <input type="checkbox"/> RET <input type="checkbox"/> ERM <input type="checkbox"/> P&C
<b>PEC Selection Track Basis</b> <input type="checkbox"/> Primary Route <input type="checkbox"/> Alternate Route		<b>PEC Selection Track Basis</b> <input type="checkbox"/> Primary Route <input type="checkbox"/> Alternate Route
<b>FIN, ILA, RET, and ERM PEC Tracks (all are required)</b> <input type="checkbox"/> VEE Economics <input type="checkbox"/> VEE Finance and Accounting <input type="checkbox"/> VEE Mathematical Statistics <input type="checkbox"/> Exam P <input type="checkbox"/> Exam FM (exam or UAP) <input type="checkbox"/> Exam IFM/MFE (exam or UAP) <input type="checkbox"/> Exam LTAM/MLC (exam or UAP) <input type="checkbox"/> Exam STAM/C (exam or UAP) <input type="checkbox"/> Exam SRM <input type="checkbox"/> FAP Modules 1–8 <input type="checkbox"/> FAP Exam 1 <input type="checkbox"/> FAP Exam 2	<b>P&amp;C Track (all are required)</b> <input type="checkbox"/> VEE Economics <input type="checkbox"/> VEE Finance and Accounting <input type="checkbox"/> Exam 1 <input type="checkbox"/> Exam 2 (exam or UAP) <input type="checkbox"/> Exam 3F (exam or UAP) <input type="checkbox"/> Exam MAS I <input type="checkbox"/> Exam MAS II (exam or UAP exam 4 transition) <input type="checkbox"/> Online Course 1 <input type="checkbox"/> Online Course 2	<input type="checkbox"/> Credit for preliminary education obtained through mutual recognition or Affiliate status.
<b>Primary Route (applicable exam <u>and</u> experience)</b> <input type="checkbox"/> FIN PEC Track: QFICOR <input type="checkbox"/> FIN PEC Track: QFIADV <input type="checkbox"/> ERM PEC Track: ERM (GC or other extension) <input type="checkbox"/> ILA PEC Track: ILALFVC <input type="checkbox"/> RET PEC Track: RETFRC <input type="checkbox"/> P&C PEC Track: CAS 6-C <input type="checkbox"/> Experience: two years  <b>Alternate Route (experience)</b> <input type="checkbox"/> Demonstrated Canadian experience relevant to the chosen PEC track in a specialty or sub-specialty where the candidate has spent at least 36 months within the last 4 years of their time working on a full-time basis. <input type="checkbox"/> FIN or ERM PEC Tracks only: No exam required if any recognized Fellowship track is complete (including Canadian exams) and two years of relevant experience to the FIN or ERM track.		<b>Primary Route (experience)</b> <input type="checkbox"/> Demonstrated Canadian experience relevant to the chosen PEC track in a specialty or sub-specialty where the candidate has spent at least 36 months within the last 4 years of their time working on a full-time basis.  <b>Alternate Route (applicable exam <u>and</u> experience)</b> <input type="checkbox"/> FIN PEC Track: QFICOR <input type="checkbox"/> FIN PEC Track: QFIADV <input type="checkbox"/> ERM PEC Track: ERMGC <input type="checkbox"/> ILA PEC Track: ILALFVC <input type="checkbox"/> RET PEC Track: RETFRC <input type="checkbox"/> P&C PEC Track: CAS 6-C <input type="checkbox"/> Experience: two years

PEC Application – Experience Form

**Conventional Primary Route or MRA/Affiliate Alternate Route Candidates:** At least two years of experience, which can be accrued in Canada, in another country, or some combination thereof are required. Outline details of your work experience in each of the following boxes as indicated. Should you require more space you may attach a supplementary Word document. A Certification of Work Experience Form is required for each position held and for each supervisor when multiple supervisors are certifying a particular portion of the work experience. Recognized Fellow designations for certification are FCIA, FCAS, FSA, FIA (IFoA), FASSA (South Africa), and FIAA (Australia).

**Conventional Alternate Route or MRA/Affiliate Primary Route Candidates:** Demonstrated Canadian experience relevant to the chosen PEC track in a specialty or sub-specialty where the candidate has spent at least 36 months within the last 4 years of their time working on a full-time basis is required. Outline details of your work experience in each of the following boxes as indicated. Should you require more space you may attach a supplementary Word document. A Certification of Work Experience Form is required for each position held and for each supervisor when multiple supervisors are certifying a particular portion of the work experience. The only recognized Fellow designation for certification is FCIA.

Work Experience		
<b>Position/Title Being Described</b>		
<b>Company/Employer</b>		
<b>Start Date</b>	<b>End Date</b>	<b>Number of Months/Years of Experience</b>
<b>Certifying Fellow's Name</b>		
<b>Certifying Fellow's Designation</b> <input type="checkbox"/> FCIA <input type="checkbox"/> FSA <input type="checkbox"/> FCAS <input type="checkbox"/> Other (please specify)	<b>Basis of Work of Candidate</b> <input type="checkbox"/> Full-time <input type="checkbox"/> Part-time, with _____ hours per week <input type="checkbox"/> Summer Internship <input type="checkbox"/> Co-op Program <input type="checkbox"/> Teaching Actuarial Science <input type="checkbox"/> Actuarial Research	
<b>Leaves of Absence</b> Please indicate if you were on a qualified leave of absence during this period, and the duration of this leave. <input type="checkbox"/> Medical, for _____ months <input type="checkbox"/> Maternity/Parental, for _____ months		

**Description of Work Experience**

*(You may use the space provided below or attach a copy of your own job description document along with this completed form.)*

**Track:**  Individual Life Insurance     Retirement     Finance and Investments     ERM  
 Property and Casualty     Other (please specify)

**Summary of Experience:**

*(This area is intentionally left blank for the candidate to provide a summary of their work experience.)*

**Experience Certification**

**Conventional Primary Route or MRA/Affiliate Alternate Route candidate:** I certify that the description of work experience performed by \_\_\_\_\_ is accurate. I also certify that this experience totals at least two years.

**Conventional Alternate Route or MRA/Affiliate Primary Route Candidate:** I certify that the description of work experience performed by \_\_\_\_\_ is accurate. I also certify that this experience totals at least 36 months of Canadian experience accrued within the last 4 years on a full-time basis.

**Certifying Fellow Signature** \_\_\_\_\_

**Print Name** \_\_\_\_\_

**Date** \_\_\_\_\_

**Certifying Fellow Designation Year**

FCIA \_\_\_\_\_ FSA \_\_\_\_\_ FCAS \_\_\_\_\_ Other \_\_\_\_\_

General Information – Practice Education Course – December 10–11 – Montréal

**Email:**  
[leslie.lenton@cia-ica.ca](mailto:leslie.lenton@cia-ica.ca)

**Mail:** Canadian Institute of Actuaries  
360 Albert Street, suite 1740  
Ottawa, ON K1R 7X7

**Contact for questions:**  
Leslie Lenton  
[leslie.lenton@cia-ica.ca](mailto:leslie.lenton@cia-ica.ca)  
613-236-8196 ext. 134

PEC Application – General Information

General Information – Practice Education Course – December 10–11 – Montréal

Candidates who have satisfied the eligibility requirements should complete this application form and return it to the CIA Head Office **by September 30, 2019**.

The official transcript(s) from an actuarial body are required at the time of application; otherwise, the application will not be processed.

**Application is on a first-come, first-served basis** depending on the date of receipt of the application form. However, due to size considerations, some practice area specialties may not be offered at every PEC session.

**Applications will be accepted on a space-permitted basis. Attendance will be restricted to candidates who have completed sufficient advanced education and who have accumulated at least two years’ work experience (including co-op time) to be able to participate fully.**

**A confirmation message will be sent via email** within 10 business days. If you do not receive an email within 10 days, contact [Leslie Lenton](mailto:leslie.lenton@cia-ica.ca) (613-236-8196 ext. 134).

Cancellation and Refund Policy

Cancellation requests received in writing by the CIA Head Office by November 15 are eligible for a refund of the application fee less a \$200 administrative fee. After that date, we will convert your payment received into a credit note, less the administrative charge of \$495 to cover food and beverage costs. This note is good for one full year, transferable within the same company, and redeemable towards one CIA conference or seminar. Same-day cancellations and no-shows are not eligible for refunds or credit notes except under special circumstances, and will be evaluated on an individual basis. Send cancellation requests to [leslie.lenton@cia-ica.ca](mailto:leslie.lenton@cia-ica.ca).

The CIA has the right to cancel any PEC session if conditions warrant. In the event of such cancellation, application fees will be refunded. The Institute will not be held liable for any airline or other cancellation fees assessed for attendees.

PEC Application – Eligibility Requirements

PEC Prerequisites		
	Conventional Route Candidates	Mutual Recognition Agreement (MRA) and Affiliate Route Candidates
Associate-Level Education	Credit for all ACIA-level requirements except for professionalism.	Credit for all ACIA-level requirements or equivalent, except for professionalism.
Primary Route	<p>Credit for one track-specific exam:  <b>FIN PEC track:</b> One of exams QFICOR or QFIADV  <b>ERM PEC Track:</b> Exam ERM (GC or other extension)  <b>ILA PEC track:</b> Exam ILALFVC  <b>RET PEC track:</b> Exam RETFRC  <b>P&amp;C track:</b> CAS 6-C</p> <p>All candidates must have at least two years of experience*.</p>	<p>Demonstrated Canadian experience** relevant to the chosen PEC track in a specialty or sub-specialty where the candidate has spent at least 36 months within the last four years of their time working on a full-time basis.</p>
Alternate Route	<p>In lieu of the above-mentioned Fellow-level exams, a candidate can attend any PEC track provided they have accrued and can demonstrate Canadian experience** relative to the chosen PEC track in a specialty or sub-specialty where they have spent at least 36 months within the last four years of their time working on a full-time basis.</p> <p><b>For FIN or ERM PEC tracks only:</b> No exam required if any recognized Fellowship track is complete (including Canadian exams) and two years of relevant experience to the FIN or ERM track.</p>	<p>In lieu of the above-mentioned primary route, a candidate can opt to successfully complete the associated examinations for the chosen PEC track as set out below, in addition to demonstrating at least two years of experience*. The experience may be gained in Canada or elsewhere.</p> <p><b>FIN PEC tracks:</b> Exam QFICOR or QFIADV  <b>ERM PEC track:</b> Exam ERM (GC or other extension)  <b>ILA PEC track:</b> SOA Exam ILALFVC  <b>RET PEC track:</b> SOA Exam RETFRC  <b>P&amp;C track:</b> CAS 6-C</p>

\*The experience must be detailed using the relevant CIA form and certified by a recognized Fellow. Recognized Fellow designations are FCIA, FCAS, FSA, FIA (IFoA), FASSA (South Africa), and FIAA (Australia).

\*\*The experience must be relevant to the chosen PEC track and must be detailed using the relevant CIA form, certified by an FCIA.