

Event 2019	Assignment: Nes=Necessary / Rec=Recommended / Disc=Discretionary ¹						
	Pres	Pres-Elect	Past Pres	Other Board Members	Other Volunteer	Spouse/ Partner Travel ²	Note: All events need to be coordinated with the Director of Governance. Discretionary and recommended events need to be approved prior to commitment by the Director of Governance and the Executive Director. Spousal discretionary travel is subject to an annual limit.
President AND President-Elect necessary	Additional Notes:						
ABCD / ASB Selection Committee	Nes	Nes				Disc	
U.S. Presidents Meeting (formally CUSP)	Nes	Nes				Disc	Pres & Pres elect spouse only
Joint Discipline Council Board	Nes	Nes				Disc	
North American Actuarial Council (NAAC)	Nes	Nes				Yes	Pres & Pres elect spouse only
SOA Board meetings	Nes	Nes	Nes	Nes		Disc	Pres & Pres elect spouse only
SOA Annual Meeting, (Mon & Tues ceremonies)	Nes	Nes	Rec*	Rec*	Rec*	Yes	Pres & Pres elect spouse only
Employers Council	Nes	Nes				Disc	
Leadership Orientation meeting	Nes	Nes	Nes	Nes	Nes	Disc	
Leadership Team calls	Nes	Nes	Nes			Disc	
IAA meetings	Nes	Nes				Yes	Pres & Pres elect spouse only
President is necessary, President-Elect necessary if President cannot attend (Nec, 1st has right of first refusal)							
Fellowship Admission Course	Nes, 1st	Nes, 2nd	Nes, 3rd			Disc	Need one person
President OR President-Elect							
Asian Actuarial Conference (AAC)	Nes, 1st	Nes, 2nd			Rec	Disc	Send one person In 2017, AAC is in same location as CAA Annual, therefore one presidential officer will attend
Caribbean Actuarial Association	Disc	Disc				Disc	One person
China Association of Actuaries (CAA)	Nes, 2nd	Nes, 1st				Disc	Send one person In 2017, AAC is in same location as CAA Annual, therefore one presidential officer will attend
SOA Health Meeting	Nes	Nes				Disc	In conjunction with Board meeting
SOA Life and Annuity Meeting	Nes, 2nd	Nes, 1st				Disc	Need one person
SOA Valuation Actuary	Nes, 1st	Nes, 2nd				Disc	Need one person
SOA Refocus Meeting	Nes, 2nd	Nes, 1st				Disc	Need one person
President OR President-Elect OR Past President							
Academy (Annual Meeting)	Nes, 1st	Nes, 2nd	Nes, 3rd			Disc	Need one person
CAS (Annual Meeting)	Nes, 2nd	Nes, 3rd	Nes, 1st			Disc	Need one person
CIA (Annual Meeting)	Nes, 1st	Nes, 2nd	Nes, 3rd			Disc	Need one person
Actuarial Students Nat'l Assn (is in Canada)	Nes, 1st	Nes, 2nd	Nes, 3rd			Disc	Need one person

Event 2019	Assignment: Nes=Necessary / Rec=Recommended / Disc=Discretionary ¹						
	Pres	Pres-Elect	Past Pres	Other Board Members	Other Volunteer	Spouse/ Partner Travel ²	Note: All events need to be coordinated with the Director of Governance. Discretionary and recommended events need to be approved prior to commitment by the Director of Governance and the Executive Director. Spousal discretionary travel is subject to an annual limit.
President OR President-Elect OR Past President OR Other Board Members							
Council of Section Chairs		Rec		Rec		Disc	PE and one or two other board as needed
Actuarial Clubs (staff to review and consider all invitations) Tier One: -New York (ASNY) -Hartford & Springfield, Boston -Kansas City -Nebraska -Pacific Rim -San Francisco (starting back up in 2017 and will need President 1st year) -Southeast Actuarial Club -Southwest Actuarial Club -Tristate IN, KY, OH -Waterloo	Nes, 1st	Nes, 2nd	Nes, 3rd	Nes, 4th		Disc	By invitation only, send one person
Actuarial Clubs: Tier Two -Chicago -Columbus -Seattle -Vancouver				Nec		No	By invitation only, send one person Necessary for regular board member, based on proximity and availability
Actuarial Clubs: Tier Three -Alberta -Arizona -North Carolina -Portland -Salt Lake -Twin Cities -Vermont -Winnipeg				Nes, 1st	Nes, 2nd	No	By invitation only One regular board member, based on proximity and availability Second choice is other volunteer based on proximity
Actuarial Research Conference			Nes, 1st	Nes, 2nd		No	Send one person
Country relationship trips	Nes - one Asia/HK trip					Disc	For necessary relationship trips (other than Asia/HK), send one presidential officer based on location and needs.
SOA Candidate Connect	Rec	Rec		Rec	Rec	Disc	One presidential officer, others as needed based on location and topic

Event 2019	Assignment: Nes=Necessary / Rec=Recommended / Disc=Discretionary ¹						
	Pres	Pres-Elect	Past Pres	Other Board Members	Other Volunteer	Spouse/ Partner Travel ²	Note: All events need to be coordinated with the Director of Governance. Discretionary and recommended events need to be approved prior to commitment by the Director of Governance and the Executive Director. Spousal discretionary travel is subject to an annual limit.
Other Volunteer Leaders							
Actuarial Teaching Conference (every other year)				Rec		No	Board partner/education
ASPPA/ACOPA Annual Meeting						No	Other volunteer, as assigned
CCA Annual Meeting				Disc		No	Other volunteer, as assigned
Central Review				Nes		No	Board partner/education
Employer visits						Disc	One presidential officer or board member based on proximity to employer
ERM Symposium					Disc	No	As assigned
Intl Assn Black Actuaries					Nec	No	Chair, Diversity & Inclusion Committee
Investment Symposium				Rec		No	Send board PD partner
Listening Tour						Disc	One presidential officer or board member based on proximity to event location
Living to 100 (every 3 years)				Rec		No	Research Board partner
Other ad hoc invitations						Disc	Milestone, special purpose, as assigned (staff to review and consider-assigned based on location and topic)
SOA Asia Pacific Symposium				Rec	Rec	No	Local members preferred. (In 2017, the Asia FAC was in Kuala Lumpur, therefore the President will attend the SOA Asia Pacific Symp.)
SOA Candidate Connect				Rec	Rec	No	As needed
SOA China Symposium				Rec	Rec	No	As assigned, only one local volunteer (In 2017, this symposium followed the Nankai University 30th Anniversary Celebration therefore a Presidential officer will attend)
University Outreach visits				Rec	Rec	No	Assigned based on proximity

* No Reimbursement for hotel stays

¹ Nes, 1st, 2nd, and 3rd indicates that it is necessary for one person to attend, it also indicates the order of the right of first refusal. If someone attends a meeting in addition to a person that is higher in the order, the travel expense will apply to the discretionary limit for the person lower in the order structure.

² Travel by the Spouse/Partner is never required by the SOA. "Disc" means SOA will pay for spousal/partner travel expense up to the discretionary travel limit. "Yes" means SOA will pay for spouse/partner travel separate from the discretionary limit. Please refer to the Notes for additional information. All payments for spouse/partner travel are considered taxable income to the appropriate presidential officer.