



# SOA Educational Institution Grant

Date:

**Contact Information:**

Name of Faculty Member		Name of Institution		
Address				
City		State/Province	Zip/Postal Code	Country
Phone	Email Address			

**Actuarial Designation Earned:**  
Check a box below

<input type="checkbox"/>	<b>Associate of the Society of Actuaries (ASA) - \$5,000 USD</b>	Date designation was attained*
<input type="checkbox"/>	<b>Fellow of the Society of Actuaries (FSA) - \$7,500 USD</b>	Date designation was attained*

**Note:** Membership status must be attained through the SOA Education system. An SOA designation granted on the basis of recognition of attainment of designation from another actuarial organization does not qualify.

\* Applications for institution grants must be received within three (3) years of the date the faculty member attains ASA or FSA designation, as indicated on the ASA or FSA diploma.

**Verification of Eligibility:**

**Required documentation:** Prior to disbursement of any grant funding, an original, signed document must be submitted verifying that the person named above was a full-time member of the regular faculty of the academic institution named above when ASA or FSA designation was attained and continues in such a capacity in a university or college actuarial program through the time of this application.

To be considered valid, verification of eligibility letters must be:

- Written on university or college stationery/letterhead
- Signed by school official
- Mailed, along with the SOA Educational Institution Grant application, to:

**Society of Actuaries  
ATTN: Academic Administrator  
475 N. Martingale Road, Ste. 600  
Schaumburg, IL 60173**

**Note:** The SOA does not recognize visiting faculty, adjuncts or graduate students as members of the regular faculty.

**Description of Usage:** (Provide a brief description of how grant funds will be used to enhance actuarial education and research at the institution.)

**Check Request Information:**

Institution check should be made payable to: <i>(Cannot be payable to an Individual)</i>			
Name of person check should be sent to:			
Address			
City		State/Province	Zip/Postal Code
		Country	
Phone	Email Address		

## PURPOSE OF EDUCATIONAL INSTITUTION GRANT

In order to recognize the added value professional actuarial qualifications offers to actuarial teaching and research, the SOA Educational Institution grant provides financial support for the promotion and development of educational and research programs in actuarial science.

## ELIGIBILITY

**Eligibility:** Full-time academic member, Full-time faculty, Full-time faculty (CAE). [Definitions of eligibility.](#)

**Institutional Eligibility:** The institution must appear on the [Universities and Colleges with Actuarial Programs \(UCAP\) list](#) at the time the ASA or FSA designation is earned, or within one (1) year from the date the designation is earned, and must continue on the list through the time of application. UCAP list includes Centers of Actuarial Excellence (CAE).

## GUIDELINES FOR USE OF SOA EDUCATIONAL INSTITUTION GRANT

Examples of the type of usage for grant funds that the SOA supports include, but are not limited to:

- Financial support for students studying actuarial science and/or conducting actuarial research
- Purchase of books and journals to enhance the collection of actuarial literature available to actuarial science students and faculty at the institution
- Promotional materials for an academic actuarial science program
- Purchase of computer hardware and software that will directly benefit actuarial science students and faculty
- Payment of actuarial examination fees
- Financial support for actuarial science students and faculty to attend actuarial conferences
- Financial support for students to attend SOA professional development seminars