

Joint Board for the Enrollment of Actuaries
Application for Renewal of Enrollment

All individuals enrolled before January 1, 2011, are required by 20 CFR 901.11(d) to renew their enrollment in order to maintain active enrollment to perform actuarial services. Enclose with this form your check or money order for \$250 (two hundred fifty) payable to the Internal Revenue Service.

If you want to send your form by regular mail, send to: **Internal Revenue Service, PO Box 301510; Los Angeles, CA 90030-1510.**

If you want to send your form by overnight mail, send to: **Internal Revenue Service, Box 301510; 19220 Normandie Avenue, Suite B; Torrance, CA 90502.**

Enrollment Number

1. Provide the following information

Name

Address (Street)

City

State

ZIP Code

Daytime phone number (Include Area Code)

Email address

Check here if any information
has changed since
the last submission. ☐**2. Please check one block for each of the following questions**

- A.** Since the issuance or latest renewal of your enrollment, have you been disciplined for alleged misconduct by any professional body or licensing authority? If **Yes**, attach a statement specifying the date, name, and location of the disciplinary authority, the nature of the misconduct, and the type of discipline imposed. **Yes** ☐ **No** ☐
- B.** Since the issuance or latest renewal of your enrollment, have you been convicted of, or fined for, a crime under the revenue laws or a crime involving dishonesty or breach of trust? If **Yes**, attach a statement providing details. **Yes** ☐ **No** ☐
- C.** Since the issuance or latest renewal of your enrollment, have you timely filed all required U.S. tax returns which became due? If **No**, attach a statement specifying the type of return, the taxable period covered by the return, and the type and amount of any penalties imposed. **Yes** ☐ **No** ☐
- D.** Are you familiar with those portions of the Employee Retirement Income Security Act of 1974 and the regulations of the Joint Board for the Enrollment of Actuaries that relate directly or indirectly to the responsibilities of an enrolled actuary? If **No**, attach a statement explaining your response. **Yes** ☐ **No** ☐

3. Enter the total hours of qualifying continuing professional education completed in each category shown in the space provided below.

	(Core Hours)	(Non-Core Hours)
A. Participant in a formal program and/or correspondence or individual study programs, including audio and video taped programs, and/or teleconferencing	_____	_____
B. Serving as an instructor, discussion leader, or speaker	_____	_____
C. Credit for published articles, books, films, audio and video tapes, etc.	_____	_____
D. Service on Joint Board advisory committees or preparation of Joint Board examinations	_____	_____
E. Credit earned by examination	_____	_____
Total Hours	_____	_____

4. If you are not reporting continuing education credit because you were initially enrolled between January 1, 2010 and December 31, 2010, check this box ☐

5. If you are not reporting continuing education credit because you have received a waiver of that requirement, attach a copy of the waiver and check here ☐

6. Declaration and Signature

Under penalties of perjury, I declare that I have examined this application, and to the best of my knowledge and belief, it is true, correct, and complete.

6a. Signature	6b. Date Signed
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Privacy Act and Paperwork Reduction Act Notice

Section 1242, United States Code, authorizes the Joint Board for the Enrollment of Actuaries (Joint Board) to collect this information. The primary use of the information is to enforce and administer the regulations of the Joint Board governing the practice of an actuary under the Employee Retirement Income Security Act of 1974 (ERISA). Information may be disclosed to: the Department of Justice when seeking advice or for use in any proceeding; courts and other adjudicative bodies during a proceeding; public authorities for their use in connection with employment, contracting, licensing, and other benefits; public authorities for their use in connection with their regulatory, enforcement, investigative, or prosecutorial responsibilities; contractors as necessary for performance of the contract; third parties as necessary during an investigation; the Department of Labor, the Department of the Treasury, and the Pension Benefit Guaranty Corporation for administering and enforcing ERISA or in connection with maintaining standards of integrity, conduct, and discipline on the part of individuals who practice before such agencies; the general public (including disclosures via web sites) for the purpose of publicizing or verifying the enrollment status and location of individuals who are, or were, enrolled actuaries; professional organizations or associations for their use in connection with maintaining standards of integrity, conduct, and discipline; appropriate agencies, entities, and persons when the Joint Board suspects or confirms that the security or confidentiality of information in a system of records has been compromised, as necessary to prevent, minimize, or remedy harm. Applying for renewal of enrollment is voluntary; however, providing the information requested on this form is a requirement to obtain the benefit of renewal of enrollment. Failure to provide the requested information could delay or prevent processing of your application. Providing false information could subject you to penalties.

Notwithstanding any other provision of law, no person is required to respond to, nor shall any person be subject to a penalty for failure to comply with, a collection of information subject to the requirements of the Paperwork Reduction Act, unless that collection of information displays a currently valid OMB Control Number. Public reporting burden for this collection of information is estimated to average 30 minutes per response, including the time for reviewing the instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to: Joint Board for the Enrollment of Actuaries c/o IRS/Office of Professional Responsibility; SE:OPR; 1111 Constitution Avenue, NW; Washington, DC 20224.