

精算师考试综合辅导:职业发展 (PD) FAQ— PDF转换可能丢失图片或格式, 建议阅读原文

[https://www.100test.com/kao\\_ti2020/84/2021\\_2022\\_\\_E7\\_B2\\_BE\\_E7\\_AE\\_97\\_E5\\_B8\\_88\\_E8\\_c50\\_84199.htm](https://www.100test.com/kao_ti2020/84/2021_2022__E7_B2_BE_E7_AE_97_E5_B8_88_E8_c50_84199.htm) If I have 15 or more Professional Development (PD) units acquired through conversion, can these credits be applied to meet the requirement to complete a project? Yes, but candidates with an interest in completing a project are encouraged to do so. They would then earn an additional 15 units for the project. If I take 15 units before submitting my plan, are they at risk if my plan is disapproved? Candidates may want to discuss their approach to PD, including the educational objectives they wish to fulfil, with their advisors before starting to attend formal programs for PD credit. There is a time limit on such programs, in that a program is valid for a period of 25 months and could expire before the plan is completed if there is a delay in obtaining approval. The credits taken must relate directly to the candidate's legitimate educational objectives for the plan. If the program(s) used provides concrete support to the plan, there should be little risk of credits not being accepted. What might cause a plan to be disapproved? There are various reasons - a lack of integration or cohesion among the plan elements (e.g. covering multiple practice areas), a superficial approach to extending the candidate's expertise, or lack of relevance of the programs cited to the objectives for the plan. In general, there should be little risk if the candidate and advisor approach the process by first establishing educational objectives and then determining appropriate programs to support

those objectives. Are there forms to submit with my initial plan and/or executed plan report? Initially, the Letter of Commitment and the PD plan, both signed by the advisor and the candidate, must be submitted along with the PD filing fee and payment form. The Letter of Commitment and payment form may be obtained from the SOA web site or the SOAs Basic Education Catalog. Model Plans have been developed and are available on the web site. Candidates filing Model Plans will still be required to file a copy of the signed Model Plan and Letter of Commitment, and will also need to submit the filing fee and payment form. Candidates may use the Model Plans exactly as written or as a framework for their plans, and adapt the plans to meet their individual PD needs. Upon completion of a PD plan, the candidate and advisor will submit to the SOA a final executed plan, a final report attesting to the successful completion of the plan and fulfillment of the educational objectives, and the Executed Plan Review Checklist signed by the candidate and advisor. The advisor and candidate must sign-off on the executed plan and report. Because the plan is unique to each candidate, we believe the attestation of a completed plan should also be unique and therefore we do not envision drafting a standardized form. The attestation should also include a written report on the project and written summaries on each program attended explaining how each program helped to attain the educational objectives of the plan and how the candidate may put to use the knowledge gained. Program content information and handouts are required for any non-approved programs. See also Tips for Submitting your PD Plan Documents.

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