

Describe your work experience including the nature of your actuarial retirement fund experience:

Defined Benefit and Defined Contribution Retirement Fund applicants How much total actuarial work experience relevant to retirement funds do you have?	<input type="checkbox"/> >= 3 years <input type="checkbox"/> < 3 years
Defined Contribution Retirement Fund only applicants How much total actuarial work experience relevant to retirement funds do you have?	<input type="checkbox"/> >= 2 years <input type="checkbox"/> < 2 years
How many of these years were post-qualification as a FASSA (or equivalent from another actuarial body) working with a Valuator?	<input type="checkbox"/> >= 1 years <input type="checkbox"/> < 1 years
Do you have at least one year of relevant working experience (obtained in the last three years) in the Republic of South Africa?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Period (from – to)	Company	Title / designation	Field of activity	Nature of experience

Work with Valuators:

Have you worked closely with any Valuators?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
If "yes" – please provide the name(s) of the Valuator(s) and dates applicable.	Name	Dates

Please attach as Annexure C a letter from the relevant Valuator confirming the nature of your experience, whether you have the necessary knowledge, skills and experience to carry out the professional duties required of a Valuator of retirement funds and whether they support your application. Letters from more than one Valuator may be supplied.

I have co-signed at least five statutory actuarial valuation reports of at least three separate South African retirement funds (defined benefit in the case of an application for "valuator of defined contribution and defined benefit funds") in the past four years. I have been considerably involved in producing and finalising such reports. The details of five of the funds are as follows:

Fund name	Type (DB / DC)	Valuation date	Date co-signed	Valuator

CPD requirements

I have met the CPD requirements over the last four years as per the Valuator Practising Certificate Requirements document.

For applicants on the hours-based CPD system only:

You are required to provide your full CPD record over at least the last two years (or two year CPD cycle) to accompany this application. Note that it is not sufficient to provide a list of hours or events. Detail of the actual sessions attended at conferences and seminars must be supplied with the number of hours for each session.

Applications that do not give sufficient detail on the CPD will not be approved.

Please complete the table below by summarising the CPD hours to ensure that you meet the requirements for a Category A member in terms of pensions and professional matters CPD over the last two years at the time of this application.

		Verifiable CPD hours per year (applicants on hours-based CPD)				
Year ending:	Number of events	Pensions practice area	Professional matters	Other	Total	Developmental CPD
Minimum requirement each year:	4	10 hours	2 hours		15 hours	50 hours

Member of good standing questionnaire

Have you been found guilty of unprofessional conduct in terms of the disciplinary procedures of the Institute and Faculty of Actuaries, the Actuarial Society of South Africa or any other IAA member organisation?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you been convicted of any serious offence by any court? (Excludes any offence committed when you were under 18 years, unless committed within the last 10 years, any road traffic offence in respect of which a fine was levied; or any political offence for which amnesty has been granted.)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you or any retirement fund with which you have been associated as an actuary been subject to legal or ombudsman proceedings where your involvement has been questioned?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you been removed by any financial services regulator as not being fit and proper to act in another approved statutory role?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Has any regulatory authority raised any professional or actuarial conduct issues with you?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Please supply further details where indicated "Yes" above.

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Certification

I certify that:

- In my opinion, I have the necessary knowledge, skills and experience to carry out the professional duties required of a Valuator.
- I have read and understand the Code of Professional Conduct.
- I have read and understand the Actuarial Society of South Africa advisory practice notes and standards of actuarial practice relating to retirement funds.
- I am fully aware of the obligations and duties of a Valuator.
- I am employed by a Registered Service Provider (RSP) or I am registered as an RSP myself.
- I have sufficient time and resources to act in the reserved roles for which the Practising Certificate will be used.
- I have read and understand the applicable regulatory requirements such as the Pension Funds Act, other relevant acts, regulations and directives.

Annexures

I attached the following annexures:

Annexure A

Hours-based CPD

CPD Records for the last two years (including both verifiable and developmental hours). The applicant should include a comment explaining the relevance of the CPD experience and what he/she has done to maintain and develop relevant skills for the role of a Valuator.

Outcomes-based CPD

Statements regarding compliance with outcomes-based CPD in accordance with the requirements. (Refer to Appendix C of the Valuator Practising Certificate Requirements document.)

Annexure B – letter of support from a Valuator with whom I have worked closely (more than one letter may be supplied)

Annexure C – statement in Appendix A of the Valuator Practising Certificate Requirements

Annexure D – response to questions in Appendix B of the Valuator Practising Certificate Requirements

Signature

Signature of applicant, confirming that the above information is accurate:

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Name:

Qualifications:

Date: