

Information About Initial and Continued Recognition as Qualifying Sponsor of Continuing Professional Education Programs for Enrolled Actuaries

General Information

An organization that wishes to provide programs that can be used by enrolled actuaries to satisfy the continuing professional education requirements for renewal of enrollment must be recognized as a qualifying sponsor by the Joint Board. To be recognized as a qualifying sponsor, an organization must file a sponsor agreement with and receive approval from the Executive Director of the Joint Board.

In general, recognition as a qualifying sponsor is effective when approved and terminates at the end of the sponsor enrollment cycle. A sponsor enrollment cycle is a three-year period that begins one year after the enrollment cycle for individual enrolled actuaries. The first sponsor enrollment cycle under the current Joint Board regulations runs from January 1, 2012 – December 31, 2014.

An organization may retain its qualifying sponsor status by filing a request for renewal before the start of each three-year sponsor enrollment cycle. It is each sponsor's responsibility to initiate the renewal request. The Joint Board does not send renewal reminders to sponsors.

Upon initial recognition or renewal of an organization's qualifying sponsor status, the Executive Director will issue a letter to the organization indicating that the organization has been recognized or renewed as a qualifying sponsor and specifying the period of recognition. Only those organizations that have received an initial recognition or renewal letter for the applicable sponsor enrollment cycle are considered qualifying sponsors for that cycle. Unless and until an organization has received an initial recognition or renewal letter for the applicable sponsor enrollment cycle, it is not recognized as a qualifying sponsor for that cycle.

Requesting Recognition as Qualifying Sponsor

An organization that wishes to become a qualifying sponsor should contact the Executive Director at nhqjbea@irs.gov for information about the sponsor agreement process. In addition, organizations should review the qualifying continuing professional education requirements, which are set forth at section 901.11(f) of the Joint Board's regulations.

Requesting Renewal of Qualifying Sponsor Status

An organization that wishes to renew its qualifying status should submit its request to the Executive Director of the Joint Board.

Include in the request: (1) the name and address of the sponsor, (2) the name and contact information for the person responsible for the continuing education programs, and (3) a statement, signed by an individual in a position to speak for the sponsor, that the sponsor

would like to renew its qualifying sponsor status for the sponsor enrollment cycle {*insert applicable sponsor enrollment cycle*}, and that it understands and will comply with the requirements set forth at section 901.11(f) of the Joint Board's regulations.

Renewal requests may be submitted by regular mail, overnight mail, or e-mail.

The address for regular and overnight mail is:

Mr. Patrick W. McDonough
Executive Director, Joint Board for the Enrollment of Actuaries
Return Preparer Office SE:RPO
Internal Revenue Service
1111 Constitution Avenue, NW, Rm. 7550
Washington, DC 20224

The address for e-mail requests is: nhqjbea@irs.gov.

Note that a formal, signed renewal request must be attached regardless of the delivery method used.