

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

Organizations that wish to provide programs that can be used by enrolled actuaries to satisfy the continuing education requirements for renewal of enrollment must be recognized by the Executive Director of the Joint Board. Organizations that wish to be recognized as a qualifying sponsor should contact the Joint Board for information about how to apply for qualifying sponsor status.

In general, recognition is effective when approved and terminates at the end of the sponsor enrollment cycle. A sponsor enrollment cycle is a three-year period. 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 will not be sending renewal reminder notices.

The current regulations, which became effective on May 2, 2011, extended the January 1, 2008 – December 31, 2010, sponsor enrollment cycle, applicable under the prior regulations, until December 31, 2011. After this transition cycle ends, the sponsor enrollment cycle will run from January 1, 2012, to December 31, 2014, and every three-year period thereafter.

A request for renewal of qualifying status for the sponsor enrollment cycle beginning January 1, 2011, will be treated as a request for renewal for the sponsor enrollment cycle January 1, 2012 – December 31, 2014. Therefore, sponsors who submitted a request for renewal effective January 1, 2011, before the current regulations were finalized, do not have to submit another renewal request for the January 1, 2012 - December 31, 2014, sponsor enrollment cycle. Sponsors who have not yet submitted a renewal request but who wish to retain qualifying sponsor status for the sponsor enrollment cycle beginning January 1, 2012, should submit a renewal request by no later than December 31, 2011.

All sponsors should note the changes in requirements for qualifying sponsors under the new regulations. In particular, qualifying sponsors are now responsible for retaining course outlines and other course material and must provide that material to the Joint Board upon request. In addition, certificates of completion and instruction must include additional information, such as whether the program qualified for ethics credits or was a formal program with respect to the participant or instructor.

Please submit any questions to [nhqjbea@irs.gov](mailto:nhqjbea@irs.gov) .

Please submit renewal requests to:

Mr. Patrick W. McDonough  
Executive Director, Joint Board for the Enrollment of Actuaries  
Office of Professional Responsibility SE:OPR  
Internal Revenue Service  
1111 Constitution Avenue, NW, Room 7238  
Washington, DC 20224

To facilitate review of your renewal request, please include (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 January 1, 2012, through December 31, 2014, and that it understands and will comply with the requirements set forth at section 901.11(f) of the Joint Board's regulations.