

## **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 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 current cycle runs from January 1, 2015 – December 31, 2017.

An organization may retain its qualifying sponsor status by filing a request for renewal before the start of each three-year sponsor enrollment cycle. Requests for the next cycle, which runs from January 1, 2018 – December 31, 2020, are due by December 31, 2017.

**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 Joint Board 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. If an organization has not received an initial recognition or renewal letter for the applicable sponsor enrollment cycle, it should assume that its organization is not recognized as a qualifying sponsor for that cycle.

Qualifying sponsors are reminded that they are responsible for providing certificates of attendance to all attendees they have verified to have successfully completed a qualifying continuing education program. Such certificates of attendance must include all the information listed in section 901.11(f)(3)(iv) of the Joint Board regulations. Qualifying sponsors are also responsible for providing certificates of instruction to each instructor, discussion leader, or speaker of a qualifying continuing education program. Such certificates of instruction must include all the information listed in section 901.11(f)(3)(v) of the regulations.

Qualifying sponsors are also responsible for maintaining certain records to show that programs are qualifying programs under the regulations. Such records must include all the information as described in section 901.11(j)(1) of the Joint Board regulations and must be retained by the qualifying sponsor for a period of six years following the end of the sponsor enrollment cycle in which the program is held.

Qualifying sponsors should keep in mind that section 901.11(n) of the Joint Board regulations provides the Executive Director may request and review the records of a qualifying sponsor to determine compliance with the above referenced requirements.

#### Requesting Recognition as Qualifying Sponsor

An organization that wishes to become a qualifying sponsor should contact the Joint Board's office at [nhqjbea@irs.gov](mailto: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 regulations.

#### Requesting Renewal of Qualifying Sponsor Status

An organization that wishes to renew its qualifying status should submit its request to the Joint Board's office.

To facilitate review, the renewal request should 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 *{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 regulations.

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

The address for regular and overnight mail is:

Joint Board for the Enrollment of Actuaries SE:RPO  
Internal Revenue Service  
1111 Constitution Avenue, NW  
REFM; Park 4, Floor 4  
Washington, DC 20224

The address for e-mail requests is: [nhqjbea@irs.gov](mailto:nhqjbea@irs.gov).

Note that a formal, signed renewal request must be attached.

10/2017