

## POLICY ON THE USE OF CIA MEMBERSHIP TITLES AND DESIGNATIONS

(Reviewed and confirmed by the Board in June 2005)

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Rule 10 of the CIA Rules of Professional Conduct states: “A member shall make use of membership titles and designations of a recognized actuarial organization only in a manner that conforms to the practices authorized by that organization.” Since the CIA Rules of Professional Conduct must be followed by all Fellows, Associates and Affiliates of the CIA, these individuals can only use their CIA membership titles and designations if that use conforms to the practices set out in this policy established by the Member Services Council.

**What is a “title”?** Annotation 10-1 to Rule 10 defines it as “any title conferred by a recognized actuarial organization related to a specific position within that organization.” In our case, this may run the gamut from elected office to appointment as members and leadership positions on CIA committees, task forces and councils.

**When can titles be used?** Titles, such as being the chairperson of a committee, can be used: 1) in all Institute correspondence, publicity and documents, such as the CIA website, *e-Bulletin* articles, documentation regarding CIA General Meetings, and letters signed on behalf of the Institute regarding Institute matters; and 2) in curricula vitae and similar documents.

For further clarity, and without limiting the generality of the foregoing, titles may not be used: 1) to promote or advertise personal or employer commercial interests; or 2) to promote or express opinions that are not official positions of the Institute.

**What is a “designation”?** Annotation 10-1 to Rule 10 defines it as “a specific reference to membership status within such organization” (i.e., within any recognized actuarial organization). In the case of the CIA, a “designation” refers to membership status (i.e., whether the person is a Fellow, Associate, Affiliate or Correspondent of the Institute).

**When can designations be used?** CIA designations (i.e., Fellow, Associate, Affiliate and Correspondent) can be used: 1) in all Institute correspondence, publicity and documents, such as the CIA website, *e-Bulletin* articles, documentation regarding CIA General Meetings, and letters signed on behalf of the Institute regarding Institute matters; and 2) in curricula vitae and similar documents.

Pursuant to our Bylaws (see Bylaw 4.04), Fellows may append to their names the initials FCIA or FICA. Fellows may identify themselves as such in any situation, provided it does not violate any other Rule of Professional Conduct (e.g., does not violate the Fellow’s obligation to act in a manner to uphold the reputation of the actuarial profession – Rule 1).

Associates and Affiliates, on the other hand, are not authorized to append to their names ACIA or AICA, nor can they append to their names “Associate, Canadian Institute of Actuaries/Associé, Institut canadien des actuaires” or “Affiliate, Canadian Institute of Actuaries/Affilié, Institut canadien des actuaires” (see Bylaws 5.02(2.1) and 5.1.02(3)).

However, Associates and Affiliates may identify themselves or be identified as Associates or Affiliates of the Canadian Institute of Actuaries, but only in a communication where there is reason to believe that the intended recipient of the communication will not be misled as to their qualifications, i.e., misled to think that they are Fellows (see Bylaws 5.02(2) and 5.1.02(2)). The reasoning behind this is simply to avoid confusion, particularly among the public. For example, it would be appropriate to refer to “Associates” as such within the Institute and when an “Associate” corresponds with a Fellow (for example, in applying for a job), since no one would be misled in such situations.

Correspondents cannot publicize, or knowingly permit publication of the fact that such person is a Correspondent of the Canadian Institute of Actuaries (see Bylaw 6.02).

**Use of the term “actuary”.** Although neither a title nor a designation, some clarification on the appropriate use of “actuary” is also in order. It has been the position of the CIA for many years that the term “actuary” should be used only in reference to a person who is a qualified Fellow. Examples of inappropriate use of the term “actuary” are as follows:

- newspaper recruiting advertisements that purport to seek “an actuary” where the candidate is described as requiring less than Fellowship status;
- companies where titles for employees such as “associate actuary” or “assistant actuary” are used to denote positions occupied by persons who do not have Fellowship status.

Many members of the CIA hold the view that these practices detract from the professional image of the actuary. Therefore, all members of the Institute – Fellows, Associates, Affiliates and Correspondents – are requested to avoid using the term “actuary” in reference to a person who is not a qualified Fellow.