

Guidelines for the use of the CAA Marks

Definitions

An “Accredited Association” means a professional organisation for the actuarial profession that has satisfied the criteria established by CAA Global Limited for accreditation, and has established a category of membership exclusively for CAA Members.

The “CAA Marks” mean one or more of the following marks only:

- i. **Certified Actuarial Analyst** (as a word-only mark in plain font, which also may be fully capitalised as CERTIFIED ACTUARIAL ANALYST)
- ii. **CAA** (a fully capitalised abbreviation of Certified Actuarial Analyst)
- iii. Certified Actuarial Analyst & logo, as shown below:



The “CAA Services” mean any one or more of the following:

Actuarial services, actuarial support services; financial evaluation; financial analysis; provision of financial information; provision of fiscal assessments; provision of insurance information; actuarial services relating to financial transactions; financial analysis services; providing business appraisals for financial valuation; comparison of performance of securities; information services relating to financial management; financial data services; information services relating to insurance and financial matters; economic financial research services; providing estimates for financial purposes; providing estimates for insurance purposes; preparation of financial analyses; financial analysis and research services; financial appraisal services; financial evaluation; financial forecasting; providing financial information and evaluations; financial information processing; financial investment analysis and stock research; preparation of financial reports; financial research and information services; financial studies; financial valuation services; fiscal valuations and assessments; information services relating to insurance; investment analysis; investment information; investment research; monitoring of pension funds, investment funds and financial portfolios; preparation of financial analysis; provision of information relating to insurance, pension and financial services; provision of insurance information; provision of investment information; providing information on variable annuity investments.

A “CAA Member” means an individual who (i) has successfully completed the criteria for certification as a Certified Actuarial Analyst (CAA) and has been awarded the CAA qualification, and (ii) has joined or become affiliated with an Accredited Association within the membership class established by that Accredited Association for CAAs.

An “IFoA CAA” means an individual who qualified as a CAA with the Institute and Faculty of Actuaries (IFoA) prior to October 20, 2016, the date on which the IFoA transferred all of its rights, title and interest in and to the CAA Marks to CAA Global Limited. An IFoA CAA is also a “CAA Member”.

Guidelines

A CAA Member is required to:

- only use the CAA Marks when: (i) CAA Global Limited has confirmed that the CAA Member is successful in achieving the CAA Qualification and (ii) is a CAA Member of an Accredited Association;
- use the CAA Marks as shown above and not make any alterations to them; and
- comply with the Regulations governing the use of the CAA Marks, i.e. conditions of use, sanctions against misuse, procedures for resolving disputes etc.

A CAA Member must not:

- use the CAA Marks if he/she is not or ceases to be a CAA Member; or
- use the CAA Marks in relation to any services other than the CAA Services or for any goods.