

# SOA Study Plan & Test Schedule

YI-PEI CHAN

1. **Exam P, Probability: passed (Sep. 2017)**
2. **Exam FM, Financial Mathematics: passed (Jun. 2018)**
3. **Exam IFM, Investment and Financial Markets**
  - Scheduled test date: **Jul. 2021** (First try: grade 05, Jul. 2019)
  - Courses taken at school: Pricing Models for Financial Engineering, Financial Management
  - Preparation material: McDonald, Derivatives Markets; Berk, Corporate Finance
4. **Exam STAM, Short-Term Actuarial Mathematics**
  - Scheduled test date: **Oct. 2021**
  - Courses taken at school: Stochastic Processes, Bayesian Statistics, Statistical Inference
  - Preparation material: Klugman, Loss Models: From Data to Decisions; Brown, Introduction to Ratemaking and Loss Reserving for Property and Casualty Insurance
5. **Exam SRM: Statistics for Risk Modeling**
  - Scheduled test date: **Jan. 2022**
  - Courses taken at school: Linear Regression Models, Statistical Machine Learning, Advanced Data Analysis
  - Preparation material: Frees, Regression Modeling with Actuarial and Financial Applications; James, An Introduction to Statistical Learning
6. **Exam LTAM, Long-Term Actuarial Mathematics**
  - Scheduled test date: **Apr. 2022**
  - Courses taken at school: Statistics in Disease Screening
  - Preparation material: Dickson, Actuarial Mathematics for Life Contingent Risks
7. **Exam PA: Predictive Analytics**
  - Scheduled test date: **Jun. 2022**
  - Courses taken at school: Advanced Machine Learning, Bayesian Machine Learning
  - Preparation material: Frees, Regression Modeling with Actuarial and Financial Applications; Healy, Data Visualization: A Practical Introduction