

# FTW Step 9: Set Actuarial Assumptions

10/30/2024 1:03 pm CDT

- Valuation methods & assumptions – Complete the 'Specifications > Actuarial Methods & Assumptions' sections. Other than segment rates that are determined automatically each year, the assumptions will carry-forward from year-to-year unless you make changes. For the Replication Year, verify that all of the parameters match what is contained in the previously completed valuation report and Schedule SB, including the segment rates, which can be overridden, if necessary.
    - BOY valuation – Since the Conversion Year is always established with a valuation date of 'Last Day of Plan Year' be sure to reset the valuation timing to 'First Day of Plan Year' if that is the case.
    - For a startup plan, set the assumptions as per required actuarial standards.
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