

ACTU 386
Actuarial Math Lab II
Winter 2017

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Introduction to Excel (5 weeks) – 40% of the overall score for the course

Excel			
Introduction to the Basic Concepts Relative to a Pension Plan <ul style="list-style-type: none"> • Types of pension plans • Normal Cost • Actuarial Liability 	Move, Copy and Edit methods Window Options Undo function Help functions Creating a chart	Find and Replace functions Sort functions Subtotal functions AutoFilter functions Pivot Table functions Protection features Control objects Functions related to text	VBA – User defined functions Iterative functions Comments Data Form functions Audit functions Error messages Others actuarial uses of Excel
Excel Environment Commonly Used functions Lookup functions	Formatting a chart Functions related to dates		

Introduction to Access (4 weeks) – 30% of the overall score for the course

Access			
Access Environment Creating a database Editing a table Getting info in and out of a database	Creating Forms Sort and Filter functions Queries SQL queries	Keeping the information accurate Reports Sharing the database Security	Pages and Modules

Introduction to Axis (4 weeks) – 30% of the overall score for the course

Axis	
Introduction to the basic concepts relative to life insurance <ul style="list-style-type: none"> ○ Definition of life insurance ○ Different types of coverage available <ul style="list-style-type: none"> ▪ term vs Whole life ▪ universal vs. traditional ▪ lapse supported product 	Introduce the concept of modules, datasets Learn how to navigate within AXIS Describe the concepts of Funds, Subfunds and Cells Describe the mechanics of a cell Learn to use certain functionalities: overrides, filters, etc... Work through an case study of how Axis can be used to price a simple life insurance plan.

Evaluation: Assignments 100%