

CALL FOR DIRECTOR AT LARGE FOR THE FP CANADA™ BOARD OF DIRECTORS

APPLICATION DEADLINE – FEBRUARY 21, 2024

FP Canada is currently recruiting for two Director at Large positions on the FP Canada Board of Directors and is seeking [applications](#) by **February 21, 2024**.

Ideal candidates will have regulatory experience, legal experience, experience in academia, and/or senior leadership experience in a national or international financial services firm. Other required and desired attributes are described below.

FP Canada believes in the value that comes from different perspectives and experiences. We are committed to pursuing diversity, equity, and inclusion within the organization and across the broader financial planning profession. As we strive to have a Board that is reflective of Canada's demographic composition, we encourage candidates who identify in traditionally underrepresented communities to apply.

ABOUT FP CANADA

A national professional body working in the public interest, FP Canada™ is dedicated to championing better financial wellness for all Canadians by certifying professional financial planners and leading the advancement of professional financial planning in Canada. There are over 20,000 professional financial planners in Canada who have met, and continue to meet, FP Canada's standards.

[IMAGINE 2030](#) is FP Canada's vision for a future where all Canadians have the financial confidence and well-being they need, along with access to professional financial planning. With the creation of its [2022-2025 Strategic Plan](#), over the next three years, FP Canada will take important steps forward to move toward our overarching goal of financial wellness for all Canadians.

The plan outlines five strategic goals, which FP Canada will work towards over the next three years:

1. Canadians have embraced and have confidence in financial planning as an important professional service on the path to financial wellness.
2. The profession operates in the public interest; is accessible and inclusive; is holistic and client-centric; and remains current and relevant to Canadian society.
3. Industry embraces professional financial planning, always in the client's best interest.

4. FP Canada leads the evolution of financial planning as a unified profession that all Canadians can confidently rely on to deliver at consistently high standards.
5. Governments recognize financial planning as a profession and support its broad accessibility, through appropriate policy and regulatory frameworks.

ABOUT THE FP CANADA BOARD OF DIRECTORS

FP Canada's Board of Directors works on behalf of the Canadian public, FP Canada certificants and other stakeholders to ensure that FP Canada's purpose — to foster better financial health for Canadians by advancing professional financial planning—is realized.

The Board is composed of 11 individuals with varied backgrounds that are relevant to achieving FP Canada's purpose including:

- Five FP Canada certificants;
- Two Public Directors;
- Two Directors at Large; and
- Two financial planners (Pl. Fin.) licensed in the province of Québec.

The Board's role is to, in conjunction with the President & CEO, establish the strategic direction for the organization. Specifically, the primary functions of the FP Canada Board are to:

- Define FP Canada's reason for existence and be accountable to stakeholders;
- Partner with management to develop FP Canada's strategic plan, monitor results, and modify when needed;
- Oversee and assess the performance of the President & CEO; and
- Define how the Board will organize itself to get its work done.

ABOUT THE BOARD POSITION

Appointments are for a three-year term, beginning in June 2024, with possible renewal for a second three-year term.

The Board typically meets a minimum of three times a year in person, and a minimum of one additional time per year by videoconference. Travel within Canada will be required, and expenses will be reimbursed in accordance with Board policy. A Director will also be expected to participate on one or more standing committees of the Board.

There is no remuneration for this position.

Role of the Director at Large

A Director at Large is an individual who:

- does not hold an FP Canada certification (CFP certification or QAFP certification) and is not a Pl. Fin; and
- works in the financial services sector or is a member of an organization or association related to the financial services sector.

The role of the Director at Large is to:

- understand and support the value and meaning of financial planning, and the importance of working with a professional financial planner, from a consumer perspective; and/or
- add his/her own specialized expertise to the FP Canada Board of Directors.

REQUIRED ATTRIBUTES

- commitment to the vision of financial wellness for all Canadians
- previous board experience (preferably with a not-for-profit organization)
- strategic and critical thinker
- ability to bring new perspectives to the Board

DESIRED ATTRIBUTES

- regulatory experience; and/or
- legal experience; and/or
- experience in academia; and/or
- senior leadership experience in a national or international financial services firm
- financial literacy and familiarity with the financial services industry
- demonstrated leadership skills
- strong interpersonal and oral communications skills
- consensus builder.

For more information on FP Canada, visit www.fpcanada.ca.

For more information on this posting, contact Joanna Tukums, Corporate Secretary, at volunteer@fpcanada.ca.

To apply for this position, please complete the written application form and submit to volunteer@fpcanada.ca by February 21, 2024.