

FP CANADA RESEARCH FOUNDATION - RESEARCH COMMITTEE MEMBER VOLUNTEER POSITION DESCRIPTION

Are you...

- Active or engaged in research in financial planning or related disciplines?
- Eager to enhance the practice of financial planning in the interest of Canadians and the profession?
- Interested in learning from others with varied research backgrounds

If this sounds like you, consider volunteering as a Research Committee member. In this challenging and rewarding role, you'll make a valuable contribution to the financial planning body of knowledge which will improve and enhance financial planning practice in the interest of all Canadians.

What to Expect?

The FP Canada Research Foundation is an independent registered charity that funds, promotes and disseminates research to help financial planners meet the increasingly complex needs of today's client. Its research priorities include technical and behavioural research geared toward enhancing the practice of financial planning delivered to Canadians and research that reflects the impact of financial planning in the lives of Canadians.

The Research Committee identifies strategic research needs and opportunities and makes recommendations to the Board on high opportunity research projects. As a member of the Research Committee, you'll contribute to the evolution of financial planning profession through research to help enhance the financial planning practice for the benefit of Canadians.

The Research Committee generally meets 3 times a year, either face-to-face or by video conference.

Benefits of Participating

As a Research Committee member, you will:

- Identify strategic research needs and opportunities;
- Make recommendations to the Board as to research priorities;
- Provide counsel on how specific research might best be accomplished; and
- Vet research proposals and make recommendations to the Board as to what gets funded.

Eligibility Requirements

To be eligible, you must:

- Hold the Pl. Fin. or CFP certification with extensive financial planning experience and ability to identify research opportunities in financial planning (and related disciplines) or technical research expertise; and
- be willing to work collaboratively.

Application Process

If you are interested in this opportunity please email Kelly Becken at kbecken@fpcanada.ca to apply Please include a cover letter and current resumé or CV that includes the following information:

- Current job responsibilities;
- Accomplishments in the field of financial planning and expertise that would be fitting with this volunteer opportunity;
- Current or previous volunteer involvement with FP Canada and FP Canada Research Foundation;
- Any potential conflicts of interest;
- Professional references; and
- Preferred session.

Selection Process

As an applicant, you may be asked to participate in evaluation exercises as part of the selection process. You must also be free of conflicts of interest. You will be expected to sign and adhere to a Confidentiality Agreement and an Acceptable Use Policy.

FP Canada Research Foundation will cover the cost of travel, accommodation and meals per FP Canada Research Foundation's Expenses Policy.

Thank you for your interest in these volunteer opportunities. If you have any questions, please email Kelly Becken at kbecken@fpcanada.ca.