FP Canada™
Advancing Professional Financial Planning

APPLICATION FOR FP CANADA™ VOLUNTEERS

Important: Please save this application form to your personal computer before starting to fill it out to avoid the risk of losing data.

Thank you for your interest in volunteering with FP Canada. FP Canada is only able to achieve its mandate with the help of the many professionals who generously volunteer their time and expertise.

Dedicated to serving the public interest, FP Canada strives to achieve a gender-balanced, ethnically and geographically diverse group of volunteers consisting of CFP® professionals, financial services executives and public members.

We would like to learn more about you and your interest in volunteering for FP Canada and thank you for taking the time to complete this application.

Sincerely,

Martin Dupras
Chair, Board Development Committee

Cary List
President & CEO, FP Canada

In an effort to recruit a qualified and diverse group of volunteers, we have developed a comprehensive selection process.

STEP 1

All interested parties should carefully review the Position Descriptions in Section I for each FP Canada volunteer opportunity to self-assess their qualifications and time availability, given the described commitment that volunteer service will require.

STEP 2

Candidates must then complete this application in full. All applications must be submitted by email to volunteer@fpcanada.ca by **November 22, 2019**.

STEP 3

FP Canada staff and/or the FP Canada Board Development Committee will carefully review and assess all applications against the Position Descriptions and will reach out to successful or short-listed candidates with further instruction. Some volunteer opportunities will require an interview prior to final selection.

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Section I: Please indicate which volunteer opportunities you wish to volunteer for: [click on the links below to learn more]

FP Canada™

- ☐ FP Canada Board of Directors
- ☐ Career Recruitment Ambassador
- ☐ Media Ambassador
- ☐ Public Policy Ambassador

FP Canada Standards Council™

- ☐ Standards Panel
- ☐ Conduct Review Panel
- ☐ Disciplinary Hearing Panel Roster

FP Canada Institute™

- ☐ Profession Education Program Assignment and Assessment Marker
- ☐ Part-time Faculty for Professional Education Programs

FP Canada™ Research Foundation

- ☐ FP Canada Research Foundation Board of Directors
- ☐ FP Canada Research Foundation Research Committee

Section II: Candidate Contact Information

Name:	Preferred Phone:
Email:	Alternate Phone:
Home Address:	
Business Name:	
Business Title:	
Business Address:	

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Section III: Candidate Snapshot

Initial year of CFP certification:

_____

Do you currently practice financial planning and work directly with clients?

- ☐ Yes
- ☐ No

Firm Size

- ☐ Large
- ☐ Midsize
- ☐ Boutique
- ☐ Independent
- ☐ N/A

Subject-matter Expertise
(check all that apply)

- ☐ Generalist
- ☐ Insurance Planning
- ☐ Employee Benefits
- ☐ Tax Planning
- ☐ Retirement Planning
- ☐ Estate Planning
- ☐ Investment Planning
- ☐ Financial Management
- ☐ N/A

Section IV: Education, Credentials and Professional Designations

Educational Degrees or Diplomas		
Name:	Date Received:	Conferred by (Institution name):
Name:	Date Received:	Conferred by:
Name:	Date Received:	Conferred by:
Licenses, Designations or Certifications		
Name:	Date Received:	Conferred by:
Name:	Date Received:	Conferred by:
Name:	Date Received:	Conferred by:
Name:	Date Received:	Conferred by:
Name:	Date Received:	Conferred by:

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Section V: Professional Experience

Please list your current and previous three positions.

Current Position:	Employer:	Dates:
Previous Position:	Employer:	Dates:
Previous Position:	Employer:	Dates:
Previous Position:	Employer:	Dates:

Section VI: Volunteer Service

Please list current and past volunteer positions held with FP Canada professional associations, industry or community organizations. Please be explicit about current and past Board experience in particular.

Organization	Service/Position Held	Start Date	End Date	Reference Name & Phone Number

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Section VII: Disclosure of Complaints Current and Past

1. Have you ever been disciplined or had a professional designation, certification or license revoked?

☐ **No** ☐ **Yes**

If yes, please explain in the space below the dates, the circumstances and the outcome.

2. Have you ever entered into a consumer proposal or declared bankruptcy?

☐ **No** ☐ **Yes**

If yes, please explain in the space below the dates, the circumstances and the outcome.

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Section VII: Disclosure of Complaints Current and Past

3. Are you, or have you ever been, under notice of complaints by clients or any regulatory agency which have led to, or may lead to, legal or disciplinary action?

☐ No ☐ Yes (Currently) ☐ Yes (Previously)

If you are currently under notice or you have been in the past, please briefly explain.

Section VIII: Open-ended Questions

Please respond to the following questions. Provide a paragraph and limit each answer to 500 words or less.

1. Why do you want to serve as a volunteer in the capacity (or capacities) you indicated?

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Section VIII: Open-ended Questions

2: What skills/expertise do you bring that would provide value in those volunteer capacities?

3. Please describe your career and/or community contributions of which you are most proud.

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Section VIII: Open-ended Questions

4. What is your perception of how the public views CFP® certification and its value proposition?

5. From your perspective, what are the most compelling issues facing the financial planning profession over the next five years? Why?

6. From your perspective, what are the most compelling issues facing the consumer over the next five years? Why?

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Section VIII: Open-ended Questions

7. In some instances, serving as a volunteer is a significant commitment of time and energy. Do you have any concerns that may impede your ability to serve? If so, how would you manage them?

8. Do you have any personal or professional conflicts of interest, current or anticipated, that FP Canada should be aware of in considering your application?

☐ **No** ☐ **Yes**

If yes, please explain in the space below.

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Section X: Acknowledgement

I hereby declare that, to the best of my knowledge, all responses in and attached to this form are accurate.

_____ _____

Signature **Date**

Please submit your completed application by email to: volunteer@fpcanada.ca

Deadline: November 22, 2019

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