

FP CANADA RESEARCH FOUNDATION RESEARCH BOARD OF DIRECTORS VOLUNTEER POSITION DESCRIPTION

Are you...

- Interested in contributing to the evolution of financial planning practice in Canada?
- Interested in helping to contribute to the financial planning body of knowledge?
- Eager to explore research that will enhance financial planning practice for the benefit of Canadians?

If this sounds like you, consider volunteering as an FP Canada Research Foundation Research Board 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 Board helps to establish the vision, mission, purpose and ends of the FP Canada Research Foundation and has oversight responsibilities for the Research Committee.

The Board meets three times a year, either face-to-face or by video conference.

Benefits of Participating

As an FP Canada Research Foundation Research Board Member, you will:

- Establish vision, mission, purpose and ends;
- Define how the Board will organize itself to get its work done;

- Determine what gets funded and for how much;
- Populate the Research Committee and the Board with the appropriate people;
- Provide direction to and oversee the Research Committee as to roles and responsibilities;
- Oversee progress on approved research, and takes corrective action if necessary;
- Support the Foundation through individual connections to help secure funding;
- Empower the executive leadership to accomplish the mandate and monitor progress toward achievement of vision, mission and ends;
- Assess the performance of the Executive Director and the Board itself; and
- Perform oversight responsibilities related to financial budgeting, reporting and external auditor selection.

Eligibility Requirements

To be eligible, you must:

- Hold the Pl. Fin. or CFP certification;
- Have a willingness to work collaboratively; and
- Have extensive financial planning expertise and, preferably, knowledge and/or experience in research development, distribution and/or funding to elevate financial planning practice.

Application Process

If you are interested in this opportunity, please email Kelly Becken at kbecken@fpcanada.ca. Please include a cover letter and current résumé 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;
- specialist expertise;
- 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 cost of any travel, accommodation and meals per FP Canada Research Foundation's Expenses Policy.

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