

# FP CANADA™ FELLOW NOMINATION PACKAGE

## 1. INTRODUCTION

The FP Canada™ Fellow distinction recognizes QAFP® professionals and CFP® professionals who have made exceptional contributions towards advancing professional financial planning in Canada.

To submit a nomination for the FP Canada Fellow Distinction, nominators should:

- review this document thoroughly;
- follow the instructions in each section to complete and submit the Nomination Package; and
- follow the guidance provided in **Section 3** to write the Letters of Support.

FP Canada must receive complete Nomination Packages no later than **May 15, 2026**.

## 2. NOMINATION ELIGIBILITY AND CRITERIA

FP Canada Fellow nominees must be a QAFP® professional or CFP® professional in good standing or an FP Retired™ status holder.

Nominators must highlight the candidate's leadership and the exceptional nature of the candidate's performance in the following areas:

- professional career contribution to advance professional financial planning;
- volunteer contribution to advance professional financial planning; and
- volunteer contribution to other professional, community or charitable organizations.

Candidates need not have made an exceptional contribution or demonstrated leadership in all three areas, but the nomination package should demonstrate that the candidate has made a strong contribution in more than one area toward the advancement of professional financial planning.

In addition, nomination packages should highlight the fact that the candidate clearly identifies themselves, and they are known and recognized as a QAFP professional, CFP professional or FP Retired status holder.

### 3. EVALUATION CONSIDERATIONS

In assessing the merit of each nomination, the FP Canada Recognition and Awards Committee will consider the significance of each nominee's achievements, independent of the achievements of other nominees.

The strength of the nomination will be determined by the information provided in the Nomination Package and by the Letters of Support.

### 4. NOMINATION GUIDELINES

1. Each nomination must include two nominators. Self-nominations are not permitted.
2. Nominations from family members and nominations from charities will not be accepted.
3. Nominations from business associates are permitted; however, only one nominator can be employed by the nominee's firm/corporation.
4. At least one nominator must hold an FP Canada certification (CFP® certification, QAFP® certification), FP Retired™ status or a F. Pl. designation.
5. Current FP Canada staff, Board members and Recognition & Awards Committee members may not act as nominators or be nominated.
6. The FP Canada Fellow will not be awarded to, and cannot be held by, an individual who has a disciplinary history with FP Canada or the Autorité des marchés financiers (AMF); or a disciplinary history with another regulator, professional body, or SRO.
7. There are no posthumous awards.

### 5. COMPLETING THE NOMINATION PACKAGE

1. Nominators are responsible for completing the Nomination Package and ensuring the information it contains is accurate.
2. Nomination Packages must include the following:
  - a. a Nomination Form completed by the nominators (**Sections 1-2**);
  - b. a Letter of Support from each nominator (**Section 3**) - additional Letters of Support will not be accepted; and
  - c. an Acceptance Form completed by the nominee (**Section 4**).
3. To ensure the most accurate, thorough, and robust submission possible, nominators are encouraged to collaborate with the nominee in completing the Nomination Form and Letters of Support.
4. FP Canada will not consider nominations received after the deadline.

# Nomination Form

## Section 1: Contact Information

### Nominee

<b>NAME OF NOMINEE</b>	
<b>EMPLOYER</b>	
<b>POSITION/TITLE</b>	
<b>ADDRESS</b>	
<b>PHONE</b>	
<b>EMAIL ADDRESS</b>	
<b>LINKEDIN URL</b>	

### Nominator 1:

<b>NAME OF NOMINATOR</b>	<b>POSITION/TITLE</b>	<b>PHONE</b>	<b>EMAIL ADDRESS</b>

### Nominator 2:

<b>NAME OF NOMINATOR</b>	<b>POSITION/TITLE</b>	<b>PHONE</b>	<b>EMAIL ADDRESS</b>

# Section 2: Awards Selection Criteria

## PROFESSIONAL CAREER

**PROFESSIONAL ROLES:** Outline the nominee’s professional career, including the nominee’s current or most recent position and at least two prior positions.

#	EMPLOYER	POSITION	YEARS (FROM TO)
1			
2			
3			
4			
5			
6			

**KEY ACCOMPLISHMENTS:** Describe the nominee’s key professional accomplishments to highlight the nominee’s exemplary leadership and contribution toward the advancement of professional financial planning.

#	KEY ACCOMPLISHMENTS*
1	
2	
3	

KEY ACCOMPLISHMENTS*	
4	
5	
6	

**AWARDS AND OTHER DISTINCTIONS:** List relevant awards and other distinctions held by the nominee, beginning with the most recent.

#	AWARD OR DISTINCTION	ORGANIZATION	YEAR	COMMENTS
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

# VOLUNTEER CONTRIBUTIONS TO ADVANCE PROFESSIONAL FINANCIAL PLANNING

**VOLUNTEER ACTIVITIES:** List the nominee’s volunteer activities that specifically demonstrate contribution toward the advancement of professional financial planning.

#	VOLUNTEER ACTIVITY	ORGANIZATION	POSITION	YEARS (FROM TO)
1				
2				
3				
4				
5				
6				
7				

**KEY ACCOMPLISHMENTS:** Describe the nominee’s key volunteer accomplishments that specifically demonstrate contribution toward the advancement of professional financial planning.

KEY ACCOMPLISHMENTS*	
1	
2	
3	

KEY ACCOMPLISHMENTS*	
4	
5	
6	
7	

## VOLUNTEER CONTRIBUTIONS TO OTHER PROFESSIONAL, COMMUNITY OR CHARITABLE ORGANISATIONS

**VOLUNTEER ACTIVITIES:** List the nominee’s volunteer contributions to other professional, community or charitable organizations (outside of the financial planning profession).

#	ACTIVITY	ORGANIZATION	POSITION	YEARS (FROM TO)
1				
2				
3				
4				
5				
6				
7				

**KEY ACCOMPLISHMENTS:** Describe the nominee’s key volunteer accomplishments to other professional, community or charitable organizations (outside of the financial planning profession).

KEY ACCOMPLISHMENTS*	
1	
2	
3	
4	
5	
6	
7	

# Section 3: Letters of Support

Each nominator must submit a Letter of Support. The quality and comprehensiveness of these letters form a key component of the Nomination Package. Additional Letters of Support will not be accepted.

Letters of Support should include as much information and as many factual details as possible to support the nomination. To ensure the most accurate, thorough, and robust submission possible, nominators are encouraged to collaborate with the nominee in completing their Letter of Support.

Specifically, each Letter of Support should:

- a. describe the nominator's relationship to the nominee;
- b. address the nominee's fulfillment of the two nomination criteria by highlighting the candidate's leadership and the exceptional nature of the candidate's performance in at least two of the following areas:
  - professional career contribution to advance professional financial planning or FP Canada standards;
  - volunteer contribution to advance professional financial planning; and
  - volunteer contribution to other professional, community or charitable organizations.
- c. be specific and provide details of the significance of the nominee's contributions and impact;
- d. to the extent possible, focus on different attributes of the nominee and different contributions, so that, collectively, the Letters of Support build a case for the nominee's worthiness for the award; and
- e. Be a minimum of 500 words and not more than 1000 words.

# Section 4: Acceptance Form

It is the responsibility of the nominee to accept the nomination and sign off on the Nomination Package to attest to the accuracy and completeness of the information prior to submission.

## ACCEPTANCE OF NOMINATION BY NOMINEE:

I, \_\_\_\_\_ hereby confirm that I accept being nominated as a candidate for the FP Canada Fellow. By signing below, I attest that:

- To the best of my knowledge, there are no current or past issues, professional or personal, that could reasonably be seen to impair my integrity, professionalism, personal or professional reputation, or suitability for this award. I further agree to promptly disclose any issues or concerns relating to my integrity or professionalism or otherwise, that may arise during the nomination consideration process.
- All information provided in support of my nomination is accurate and complete. I understand that any misrepresentation or failure to disclose relevant information may result in the withdrawal of my nomination or any award granted.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

# Section 5: Final Steps

## CHECKLIST FOR YOUR COMPLETE NOMINATION PACKAGE

**Section 1** – Contact Information (for nominee and two nominators)

**Section 2** – Awards Selection Criteria

**Section 3** – A Letter of Support from each nominator

**Section 4** – Acceptance Form (signed by the nominee)

## SUBMISSION PROCESS

The nomination deadline is **May 15, 2026**. FP Canada will not consider 2026 nominations received after that date.

FP Canada will provide nominators with a confirmation of receipt of submissions. If you have nominated an individual and do not receive a confirmation of receipt by **May 22, 2026**, please contact FP Canada immediately.

FP Canada will notify all nominators of the outcome of their nominations once all submissions have been reviewed by the FP Canada Recognition & Awards Committee. If you have any questions about the process, please contact [awards@fpcanada.ca](mailto:awards@fpcanada.ca).

## SUBMIT YOUR COMPLETE NOMINATION PACKAGE BY EMAIL TO:

[awards@fpcanada.ca](mailto:awards@fpcanada.ca)