

Call for FP Canada™ Certificant for the FP Canada Board of Directors

APPLICATION DEADLINE – NOVEMBER 8, 2024

FP Canada is currently recruiting for an FP Canada certificant (Certified Financial Planner® professional or Qualified Associate Financial Planner™ professional) to join the FP Canada Board of Directors.

To apply for this position, please complete the written application form and submit to volunteer@fpcanada.ca by November 8, 2024.

While all interested candidates are encouraged to apply, an ideal candidate will have strategic experience in academia or senior leadership experience at a credit union, pension organization, or digital bank or hold an accounting designation. 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

Established in 1995, FP Canada is a national not-for-profit education, certification and professional oversight organization working in the public interest. FP Canada is dedicated to championing better financial wellness for all Canadians by leading the advancement of professional financial planning in Canada. There are approximately 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.

FP Canada is in the process of finalizing a new 2025-2030 strategic plan. This plan encompasses a holistic approach to addressing the challenges and opportunities facing the professional financial planning community, including advancing professionalism, fostering trust and transparency, embracing technological advancements, and promoting diversity, equity, and inclusion. The plan outlines three strategic priorities, which FP Canada will work towards over the next five years:

1. FP Canada supports consumer access to professional financial planning;

2. FP Canada is the organization of choice for professional financial planning; and
3. FP Canada operates with excellence.

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 champion better financial wellness for all 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 2025, 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 FP Canada Certificant Director

The role of the FP Canada Certificant Director is to:

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

Required Attributes

- a Certified Financial Planner® professional or Qualified Associate Financial Planner™ professional in good standing
- commitment to the vision of financial wellness for all Canadians
- strategic and critical thinker
- ambassador for the profession
- ability to bring new perspectives to the Board

Desired Attributes

- strategic experience in academia or senior leadership experience at a credit union, pension organization, or digital bank
- accounting designation (CPA)
- previous board experience (preferably with a not-for-profit organization)
- demonstrated leadership skills
- demonstrated community engagement (preferably within the financial planning community and/or directly with FP Canada)
- 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.

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