

Public Director Position Profile for the FP Canada Board of Directors

APPLICATION DEADLINE – NOVEMBER 14, 2025

FP Canada is currently recruiting for a Public Director 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 14, 2025.

Ideal candidates will have a CPA designation with a thorough understanding of financial reporting, internal controls and investment management oversight. Other desired attributes include strategic experience in AI adoption, cybersecurity, mergers and acquisitions and/or organizational transformations. A complete list of required and desired attributes is 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.

IMAGINE 2030 is FP Canada's vision of a future where, by the year 2030, all Canadians have financial confidence and wellbeing. It's a vision of the future where all Canadians have access to professional financial planning that supports their diverse needs, and where financial planning is a unified profession, recognized in statute and deemed essential by society.

The FP Canada™ **2025-2030 Strategic Plan** outlines the three priorities we will pursue to achieve our mandate of leading the advancement of professional financial planning. The 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. It aligns with IMAGINE 2030, FP Canada's vision for a future where all Canadians have the financial confidence and wellbeing

they need to achieve their financial goals through professional, ethical, and accessible financial planning services.

The three strategic priorities outlined in the 2025-2030 Strategic Plan include:

1. FP Canada supports consumer access to professional financial planning.
2. FP Canada is the organization of choice for professional financial planning.
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 vision, purpose and mandate;
- 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 2026, 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 Public Director

FP Canada's by-laws defines a Public Director as a Director who:

- is not an FP Canada Certificant or Pl. Fin.;

- does not currently earn any compensation (including, but not limited to wages, salaries, bonuses commissions, benefits, and retirement plans) from any financial services organization, which includes but is not limited to a bank, a credit union, an investment or mutual fund broker, dealer or distributor, an insurance company, dealer or distributor, and/or a financial planning firm; and
- is independent from and not a member of any organization or association that serves the interests of any financial services organization.

The role of the Public Director is to:

- ensure that the public interest perspective is directly represented at FP Canada Board meetings;
- understand and support the value and meaning of financial planning, and the importance of working with a professional financial planner, from a consumer perspective; and/or
- add his/her own specialized expertise to the FP Canada Board of Directors.

Required Attributes

- Chartered Professional Accountant (CPA) in good standing with core skills in financial reporting, internal controls and investment management oversight
- commitment to the vision of financial wellness for all Canadians
- previous board experience (preferably with a not-for-profit organization)
- strategic and critical thinker
- ability to bring new perspectives to the Board

Desired Attributes

- strategic experience in AI adoption, cybersecurity, mergers and acquisitions and/or organizational transformations
- familiarity with the financial services industry
- demonstrated leadership skills
- 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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