

FP CANADA™ FELLOW NOMINATION PACKAGE

1. INTRODUCTION

The FP Canada Fellow distinction was established to recognize individuals who have made a significant contribution to furthering FP Canada’s mandate to advance professional financial planning in Canada.

To submit a nomination for the FP Canada Fellow, 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 6.6** to write the Letters of Support.

FP Canada must receive complete Nomination Packages no later than **Monday, May 20, 2024**.

2. NOMINATION CRITERIA

FP Canada Fellow nominees may or may not be FP Canada certificants. They will be assessed against the following criteria:

1. Volunteerism to Advance FP Canada’s Mandate

Nominees must have demonstrated a passion and commitment to FP Canada’s mandate to advance professional financial planning in Canada and should have a long-standing history of volunteering with FP Canada and/or volunteerism with third parties that is directly related to FP Canada’s mandate and purpose. “Volunteering” does not include activities directly related to one’s job.

2. Advancement of FP Canada Standards

Nominees have developed, and/or have inspired others to develop or adopt FP Canada’s standards. Nominees’ work in this area has or will further the public interest and enhance the reputation of FP Canada certifications and may be through volunteerism or activities directly related to one’s job.

3. EVALUATION CONSIDERATIONS

In assessing the merits 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 two criteria above provide a consistent framework for which to assess the merits of a nomination. The strength of the nomination will be determined by the information provided in the nomination package and by the Letters of Support.

Given that the FP Canada Fellow is a prestigious distinction, the criteria for acceptance of new Fellows are extremely high. As such, the FP Canada Fellow distinction may not be awarded every year.

4. NOMINATION GUIDELINES

1. Each nomination must include two nominators.
2. Self-nominations are not permitted.
3. Nominations from close family members and nominations from charities will not be accepted.
4. Nominations from business associates are permitted; however, only one nominator can be employed by the nominee's firm/corporation.
5. At least one nominator must hold an FP Canada certification (CFP® or QAFP®) or an FP Retired status or a Pl. Fin. designation.
6. Current FP Canada staff, Board members and R&A Committee members may not act as nominators or be nominated.

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 6.1 - 6.5**).
 - b. a Letter of Support from each nominator (additional Letters of Support will not be accepted) (**Section 6.6**); and
 - c. an acceptance form completed by the nominee (**Section 7**).
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 in any given year.

6. NOMINATION FORM

6.1. Contact Information

Nominee

NAME OF NOMINEE	
Employer	
Position/Title	
Business Address	
Business Phone	
Email	
LinkedIn url	

Nominator 1:

NAME OF NOMINATOR	
Employer	
Position/Title	
Business Address	
Business Phone	
Email	
LinkedIn url	

Nominator 2:

NAME OF NOMINATOR	
Employer	
Position/Title	
Business Address	
Business Phone	
Email	
LinkedIn url	

6.2. Volunteerism to Advance FP Canada’s Mandate

Criteria: Nominees must have demonstrated a passion and commitment to FP Canada’s mandate to advance professional financial planning in Canada and should have a long-standing history of volunteering with FP Canada and/or volunteerism with third parties that is directly related to FP Canada’s mandate and purpose. “Volunteering” does not include activities directly related to one’s job.

Summary: Describe the nominee’s volunteer activities that directly support FP Canada’s mandate to advance professional financial planning in Canada.

#	VOLUNTEER ACTIVITY	ORGANIZATION	POSITION	YEARS (FROM-TO)
1				
2				
3				
4				
5				
6				
7				
8				

Key Accomplishments Achieved through Volunteer Activities: Describe the nominee’s key volunteer accomplishments and contributions to support FP Canada’s mandate to advance professional financial planning in Canada.

LINK TO # ABOVE	KEY ACCOMPLISHMENTS*

* If you wish to include additional information, please submit a supporting document with the nomination package

6.3. Advancement of FP Canada Standards

Criteria: Nominees have developed, and/or have inspired others to develop or adopt FP Canada’s standards. Nominees’ work in this area has or will further the public interest and enhance the reputation of FP Canada certifications and may be through volunteerism or activities directly related to one’s job.

Summary: Describe the nominee’s volunteer or professional activities that directly support the advancement of FP Canada professional standards.

#	ACTIVITY	ORGANIZATION	POSITION	YEARS (FROM-TO)
1				
2				
3				
4				
5				
6				
7				
8				

Key Accomplishments Achieved Through Volunteer or Professional Activities: Describe the nominee’s accomplishments and contributions towards the advancement of FP Canada professional standards.

LINK TO # ABOVE	KEY ACCOMPLISHMENTS*

* If you wish to include additional information, please submit a supporting document with the nomination package

6.4. Professional Career

Summary: Describe the nominee’s professional career, beginning with the nominee’s current or most recent position.

EMPLOYER	POSITION	YEARS (FROM-TO)

Key Accomplishments: Describe the nominee’s key career accomplishments and contributions to the financial planning profession.

#	KEY ACCOMPLISHMENTS*
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	

* If you wish to include additional information, please submit a supporting document with the nomination package

6.5. 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				

6.6. Letters of Support

Each nominator must submit a Letter of Support. The quality and comprehensiveness of these letters form an important component of the nomination package. Additional Letters of Support will not be accepted.

Letter of Support should include as much information and factual detail 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:

Volunteerism to Advance FP Canada's Mandate

Nominees must have demonstrated a passion and commitment to FP Canada's mandate to advance professional financial planning in Canada and should have a long-standing history of volunteering with FP Canada and/or volunteerism with third parties that is directly related to FP Canada's mandate and purpose. "Volunteering" does not include activities directly related to one's job.

Advancement of FP Canada Standards

Nominees have developed, and/or have inspired others to develop or adopt FP Canada's standards. Nominees' work in this area has or will further the public interest and enhance the reputation of FP Canada certifications, and may be through volunteerism or activities directly related to one's job;

- 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.

7. 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 accept being nominated as a FP Canada Fellow and certify that the information provided in these documents is true and accurate.

Name: _____

Signature: _____

Date: _____

8. CHECKLIST FOR YOUR COMPLETE NOMINATION PACKAGE

- Nomination Form (**Section 6**) completed by the two nominators (one Nomination Form per package)
- A Letter of Support from each nominator (additional Letters of Support will not be considered)
- Acceptance Form (**Section 7**) completed by the nominee.

9. SUBMISSION PROCESS

The nomination deadline is May 20, 2024. FP Canada will not consider 2024 Fellow 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 21, 2024, 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.

SUBMIT YOUR COMPLETE NOMINATION PACKAGE BY EMAIL TO:

awards@fpcanada.ca