

Client Organization: FP Canada
Position Title: Executive Director, Education and Professional Practice, Head of the FP Canada Institute
Reports to: President & CEO
Location: Toronto, Canada

THE ORGANIZATION

About FP Canada™

A national certification and professional oversight body 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 about 17,000 CERTIFIED FINANCIAL PLANNER® professionals and about 2,000 QUALIFIED ASSOCIATE FINANCIAL PLANNER™ professionals (as of September 30, 2022), who meet FP Canada's rigorous professional and ethical standards.

At a time when society is facing unprecedented technological disruption in all walks of life, Canadians have a greater need than ever for personalized financial planning advice with a human touch. Our vision – [IMAGINE2030](#) – of the future is one where all Canadians have access to professional financial planning and financial planning is unified, recognized in statute and deemed essential by society. Our [Strategic Plan](#) outlines the work we'll do over the next three years toward achieving that vision.

At a high level, FP Canada sets the strategic direction for professional financial planning in Canada. FP Canada also achieves its mandate through two distinct divisions. Through the FP Canada Standards Council™ division, FP Canada establishes financial planning standards and enforces those standards among FP Canada certificants— QAFP™ professionals and CFP® professionals. Through the FP Canada Institute™ division, which is dedicated to elevating the practice of financial planning, FP Canada provides professional education, tools, and resources to help financial planners meet the needs of all Canadians.

FP Canada operates in all provinces except Québec; however, through a strategic partnership with Institut québécois de planification financière (IQPF), the only body in Québec authorized to confer financial planning diplomas, FP Canada's standards are adopted nationally.

In Ontario, FP Canada has been approved by the Financial Services Regulatory Authority of Ontario (FSRA) as a credentialing body to grant and oversee Financial Planner title use under the Financial Professionals Title Protection Act, 2019. CERTIFIED FINANCIAL PLANNER certification and QUALIFIED ASSOCIATE FINANCIAL PLANNER certification have been approved by FSRA for use of the Financial Planner title in Ontario.

In other provinces, with the exception of Québec, those who call themselves financial planners are not required to obtain any credentials whatsoever. At FP Canada, we believe that everyone using the financial planner title should be required to meet minimum standards of education and experience, subject to stringent ethical requirements, actively supervised by a recognized credentialing body and subject to a rigorous complaints and discipline process. These requirements are met by all CFP professionals and QAFP professionals.

Regulating the use of the Financial Planner title benefits consumers by providing them with the clarity and confidence they need when seeking professional financial planning advice to help them achieve financial wellness.

About the FP Canada Institute™

A division of FP Canada, the FP Canada Institute; is dedicated to elevating the practice of financial planning. The FP Canada Institute provides professional education, practice support tools and other resources to financial planners and financial planning students to help them meet the needs and expectations of all Canadians seeking financial planning advice from a certified professional.

The FP Canada Institute currently offers three pre-certification e-learning programs: Introduction to Professional Ethics (IPE), the CFP Professional Education Program, and the QAFP Professional Education Program. These e-learning programs help prospective and existing financial planners apply their technical knowledge, learn key facets of human behaviour that affect the planning engagement and decision-making, and develop essential professional skills in the areas of communications, critical thinking and ethics. These programs complement the Core Curriculum and Advanced Curriculum Programs offered by colleges, universities and third-party educators on the paths to certification. The Institute also offers some continuous professional development courses for CFP professional including Improving CPP Planning for Canadians and the Advanced Certificate in Financial Planning. In the years ahead, the FP Canada Institute will be adding more education programs and developing tools and other resources to enrich financial planners' knowledge and skills and equip them with the tools to serve clients as effectively as possible

THE OPPORTUNITY

The Executive Director, Education and Professional Practice and Head of the Institute is responsible for developing and implementing strategies to support the growth and sustainability of all of FP Canada Institute's educational and professional practice programs. This position is critical to ensuring continued success and growth for all education programs offered as part of the FP Canada Institute including all education leading to the CFP qualification, QAFP qualification and continued education to support the on-going professional development for FP Canada certificants.

The incumbent will oversee the development of new products and services in support of FP Canada Institute's purpose of elevating the practice of financial planning, including professional education, practice support tools and other resources to financial planners and financial planning students, and build and foster strong internal and external relationships which will be critical to the successful achievement of the Institute strategy.

The incumbent will be responsible for all business development activities to drive future growth of the FP Canada Institute including identification of new markets for current products, development of new and innovative offerings to meet the evolving educational requirements of prospective and existing CFP Professionals and QAFP Professionals, and the expansion into new partnerships and market opportunities.

RESPONSIBILITIES AND ACCOUNTABILITIES

Development and implementation of long-term strategies for the FP Canada Institute that will support the continued growth of the Institute in alignment with FP Canada's strategic plan.

Oversight of the development and on-going operation of FP Canada's educational programs, ensuring currency and relevance of education for professional financial planners including:

- establishing the vision and learning objectives for all education programs;
- developing and executing a data-driven plan to scale programs;

- working with key stakeholders to identify the highest value of program changes and updates;
- managing the integration of structures, processes, systems including appropriate technology solutions that maximize the quality of the student learning experience;
- ensuring education practices, policies and services are developed and implemented as required to support effective and efficient program delivery; and
- engaging with customers (students and industry employers) to assess satisfaction with the quality and relevance of all FP Canada education programs.

Development and accountability for the FP Canada Institute's Business Plan including:

- establishing sales and revenue goals in partnership with the FP Canada President and CEO; and
- working collaboratively with the FP Canada marketing team to support the ongoing development and maintenance of a prospect database and development of budgets for annual growth and revenue targets.

Cultivation of relationships with key external strategic partners and other stakeholders including industry employers, FP Canada certificants, post-secondary institutions, other education providers, and regulators to enhance current markets and identify new opportunities for the Institute.

Establishment and maintenance of strong relationships with faculty and senior leadership of academic institutions to promote, support and enable programs that will deliver professional financial planning curriculum within post-secondary institutions.

Development and fostering of an inclusive and collaborative team culture that centers on:

- embedding empathy, respect, inclusiveness, feedback, and transparency into everyday practices;
- fostering innovation by creating conditions for new ideas and creative solutions to be exchanged;
- facilitating cross-functional collaboration; and
- working with the senior leadership team to develop and implement a high-performance culture at FP Canada.

THE CANDIDATE

The ideal candidate will possess the following knowledge, experience, skills and attributes:

- Progressively more responsible and accountable strategic executive leadership experience in the financial services industry and in a senior business development capacity
- Experience in the design and delivery of professional level training
- Preferably a CFP or QAFP certificant
- Knowledge of and demonstrated commitment to financial planning and financial services education
- Strong communication, interpersonal, and networking skills
- Strong relationship building and vendor management skills
- Ability to establish and nurture productive, win-win relationships with key internal and external stakeholders
- Ability to work collaboratively across all areas within an organization
- Leads by example and builds high-performance teams
- Well-developed strategic planning skills and ability to execute effectively on complex strategy(ies)
- Knowledge of the regulatory and political environment of the financial services industry is an asset
- Experience working with the university/ academic community is an asset

Core Organizational Competencies

- **Quality of Work:** Consistently produces work with a high degree of excellence, accuracy, and attention to detail. Keeps current of issues and trends.
- **Quantity and Output:** Meets deadlines, remains focused and manages multiple projects/priorities to deliver results.
- **Professionalism:** Projects the organization's values and represents the organization with integrity and passion when dealing with all stakeholders.

- **Collaboration and Teamwork:** Works collaboratively with all internal and external stakeholders, shows empathy, demonstrates respect, treats all with equality and fairness. Acts ethically at all times. Builds strong partnerships.
- **Communication Skills (written/oral):** Effectively prepares and delivers information, orally and in writing, in a clear, open, and concise manner.
- **Critical Thinking:** Effectively analyses and evaluates options, considering all implications and consequences of decisions.
- **Adaptability:** Embraces change. Actively advocates work improvement and efficiency within the organization, its structures, work processes, tasks, and culture.
- **Initiative:** Proactively sets and holds self-accountable for high standards and goals for self and the organization. Seeks out new challenges and seizes opportunities to learn, develop and grow.
- **Leadership:** Approachable and highly motivational; naturally fosters productivity and positive morale. Always puts the organization’s needs ahead of personal ego.
- **Decision Making:** Consistently selects the most effective alternatives that align with organizational objectives.
- **Strategic Thinking:** Consistently develops objectives and initiatives that align with FP Canada’s strategic vision. Contributes positively to the organization’s strategic direction.

CONTACT INFORMATION

If you are interested in being considered for this exciting and challenging leadership position, **please submit your expression of interest (cover letter and current resume) to Cheryl Lai, Senior Consultant at cheryl.lai@lhhknightsbridge.com** with “FP Canada Executive Director, Education and Professional Practice and Head of the Institute” in the subject line.

Should you have any questions regarding this opportunity, please contact a member of the Project Team:

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About LHH Knightsbridge – www.lhhknightsbridge.com

At LHH, we exist to help people, teams and organizations find and prepare for what’s next. Our end-to-end HR solutions future-proof organizations and careers all over the world. Through Advisory, Career Transition & Mobility, Insights, Learning & Development and Recruitment Solutions, we enable transformation, and our job is never done because there’s always another tomorrow to prepare for.

We make a difference to everyone we work with, and we do it with local expertise, backed by global infrastructure and industry-leading technology. LHH’s over 8,000 colleagues and coaches span 66 countries worldwide, working with more than 15,000 organizations, a majority of Fortune Global 500, and nearly 500,000 candidates each year. Together we address needs across the entire talent journey, helping organizations build their capabilities and individuals build brighter futures.

LHH is a part of the Adecco Group, the world’s leading talent advisory and solutions company, headquartered in Zurich Switzerland.