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FP CanadaTM
*Advancing Professional
Financial Planning*

POSITION PROFILE

FP CANADATM – PRESIDENT & CHIEF EXECUTIVE OFFICER

October 2020



POSITION PROFILE

Client Organization: FP Canada™
Position Title: President & CEO
Reports to: Board Chair and Board of Directors
Location: Toronto, Ontario, Canada



THE ORGANIZATION

A national professional body working in the public interest, FP Canada™ (fpcanada.ca) is dedicated to championing better financial wellness for all Canadians by leading the advancement of professional financial planning in Canada. There are approximately 21,000 professional financial planners in Canada who have met, and continue to meet, FP Canada’s™ standards through the QUALIFIED ASSOCIATE FINANCIAL PLANNER™ certification (QAFP™) or CERTIFIED FINANCIAL PLANNER® certification (CFP®).

A division of FP Canada™, the FP Canada Institute™ is dedicated to elevating financial planning practice through professional education, practice support tools and other resources to financial planners and students to help them meet the needs and expectations of all Canadians seeking financial planning advice from a certified professional. The FP Canada Institute™ also works to partner with institutions of higher learning to further its mandate.

A division of FP Canada™, the FP Canada Standards Council™ establishes and enforces financial planning standards, sets the certification requirements for professional financial planners and develops and delivers certification examinations. The FP Canada Standards Council™ ensures that those it certifies meet appropriate standards of competence and professionalism through rigorous requirements of education, examination, experience and ethics.

As a certifying body, FP Canada™ ensures CFP professionals and candidates meet appropriate standards of competence and professionalism. FP Canada™ has also demonstrated a commitment to its own internal quality standards by becoming one of the first certification bodies in Canada to receive ISO 17024 accreditation, from the Standards Council of Canada (SCC), meeting globally recognized standards for certification bodies.

FP Canada™ is also a member in the global Financial Planning Standards Board, the holder of the CFP certification marks in 26 member territories. FP Canada™ is a recognized leader within the network of certification and/or membership organizations that certify to the common global CFP certification standards.

FP Canada™ earns the majority of its revenue through annual certification fees, professional education, examination fees, event fees and sponsorships.

The FP Canada Research Foundation™ (fpcanadaresearchfoundation.ca), an independent registered charity, is dedicated to funding, promoting and disseminating financial planning research for the benefit of Canadians. The Foundation focuses on technical and behavioral research that enhances financial planning practice. The Board of the FP Canada Research Foundation™ is comprised of the CEOs and members of the boards of each of FP Canada™ and the Quebec Institute of Financial Planning, the organization that administers financial planning diplomas in Quebec.

THE OPPORTUNITY

The President & CEO provides the strategic and operational leadership for FP Canada™, including support to the Board of Directors and its Committees. The President & CEO is the “public face” of FP Canada™ to the financial planning profession and to key constituents and stakeholders. The President & CEO is responsible for the overall management of FP Canada™ on a day-to-day basis, in compliance with applicable laws, regulations and corporate policies and in accordance with the company's vision, mission and cultural values/guiding



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principles. Working transparently and collaboratively with the Chair, the Board and the executive leadership team, the President & CEO ensures that FP Canada™ develops long-term strategies, establishes appropriate goals and targets, manages its resources to meet those goals and targets and executes the plans necessary to deliver a high standard of business performance and corporate governance. The President & CEO creates a high-performance organization through the establishment of key competencies and success factors to deliver on the organization's brand and brand promise to the Board, to the profession/membership, and to stakeholders and strategic partners. FP Canada™ has grown dramatically both in size and stature over the last decade, to become an influential leader in the development of the financial planning profession in Canada, and as a key thought leader and influencer in the broader financial advisory sector. With a significant expansion of scope and a track record of success, and with the incumbent retiring in June 2021, the opportunity exists for a successor that reflects a dynamic, passionate influential leader with a strong vision and proven track record to take FP Canada™ and the financial planning profession to the next level. The President & CEO is an excellent strategist, with entrepreneurial instincts, strong financial skills, exemplary stakeholder engagement and management, who perceives the "art of the possible", and encourages accountability and ownership.

Key Responsibilities and Accountabilities:

- Develop and recommend to the Board for approval, corporate policies, strategies and objectives to achieve the mandate set by the Board.
- Provide leadership, management and control over all activities of the organization within those approved policies, strategies and objectives.
- Lead/Manage all strategy, policy implementation, administration and day to day operations.
- Develop and recommend to the Board for approval, long-range and annual business plans including operating and capital budgets.
- Implement long-range and annual business plans.
- Report to the Board on a regular basis on actual performance compared to plan and in relation to the business plan metrics.
- Represent FP Canada™ as official spokesperson on all matters except for those that are clearly governance matters.
- Develop, maintain and manage key strategic relationships/partnerships to advance FP Canada's™ vision and mission.
- Lead, motivate and manage the employee team, including development of a management succession plan.
- Liaise with the Board Chair and Committee Chairs on a regular basis, keeping all informed of all material matters relating to their areas of responsibility.
- Continue to enhance FP Canada's™ public image and value proposition locally, nationally and internationally with relevant stakeholders.

THE CANDIDATE

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

Education and Experience

- A relevant post-secondary degree.
- A relevant professional designation (eg. CFP, CPA, CFA) is a strong asset.
- Experience with Board governance and best practices.
- Progressively more responsible and accountable senior executive strategic leadership roles (eg. in a financial advisory, allied professional services, academic or regulatory environment).
- Deep understanding of the nuances and complexities of professional bodies and certification processes.
- Experience in a service-focused environment with scope and scale of diverse stakeholder engagement and building organization/brand reputation.

Visionary Leader and Strategist

- Understands the value of the financial planning profession, builds a compelling and sustaining value proposition to key stakeholders and partners, and can anticipate change ahead of the curve.
- Proactively recognizes potential growth opportunities and demonstrates excellent business and financial acumen.
- Implements continuous improvement strategies and plans in core operations.

Team Builder

- Grounded in a strong sense of organizational excellence and alignment of cultural values and principles.
- Builds team effectiveness through a common vision and purpose, and commitment to high performance within and across teams. Demonstrates the power of cross-functional collaboration and teamwork.
- Has proven ability to develop, coach and mentor team members.
- Able to inspire confidence and lead by example.
- Sets performance metrics aligned to key deliverables and outcomes.
- Effectively builds consensus and holds themselves and the team accountable.
- Demonstrates initiative and motivation; able to roll up sleeves.
- Resourceful.

Relationship Builder

- By nature, this individual is a collaborator, operates in a spirit of cooperation and can envision win-win solutions.
- Easily builds credibility and trust with all stakeholders and partners.
- Possesses strong influencing and negotiating skills; can effectively deal with complex issues and relationships.
- Positions FP Canada™ as a key and valued partner to other organizations with a 'mutual gains' perspective and benefit.

Excellent Communicator

- Believes in and lives in an environment of open, frank, and transparent communication.
- Serves as a role model with excellent interpersonal (including listening) skills.
- Is an effective conduit between the Board and senior management.
- Engages well with employees at every level.
- Self-confident, with ego in check.
- Bilingual capability (English/French) is an asset.

Decisive and Consistent

- Maintains professional presence, credibility and business maturity in pressure/conflict situations.
- Makes solid recommendations and substantiated decisions within a changing environment and landscape.
- Able to make the tough decisions and support others to do so as well.
- Is action-oriented and results focused.
- Demonstrates integrity, respect and trust.

Possesses Solid Proven Implementation Skills

- Is a business builder with ability to successfully drive strategy through to execution.
- Is committed to delivering on strategic plans.
- Possesses excellent financial acumen.
- Is tenacious in acting on plans and realizing opportunities.



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AMROP KNIGHTSBRIDGE CONTACT INFORMATION

If you are interested in being considered for this exciting and challenging senior executive leadership position, please submit your confidential expression of interest (cover letter and current resume) by email to Ed Perkovic, VP Search Delivery at eperkovic@amropknightsbridge.com with “President & CEO, FP Canada™” 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 AMROP KNIGHTSBRIDGE - www.amropknightsbridge.com

Amrop Knightsbridge is a leading executive search firm with offices across Canada and partner offices around the globe. Amrop Knightsbridge is an integral part of LHH Knightsbridge, a human capital management organization comprising teams of specialists with an integrated perspective across recruitment, leadership and organizational development, learning, and career and workforce management. Solutions are customized to fully meet client specific needs, maximizing investments in people and achieving optimal organizational and business productivity and performance. LHH Knightsbridge has been recognized over multiple years as one of Canada's Top 50 Best Managed Companies. Further LHH Knightsbridge information is available at www.lhhknightsbridge.com.