

# DONALD J. JOHNSTON LIFETIME ACHIEVEMENT AWARD IN FINANCIAL PLANNING NOMINATION PACKAGE

## 1. INTRODUCTION

Donald J. Johnston led FPSC<sup>®</sup> (now FP Canada<sup>™</sup>) through its successful first decade of development and operation as the premier standard-setting organization for the financial planning profession in Canada.

**The Donald J. Johnston Award recognizes a recipient's lifetime contribution and positive impact on FP Canada's certifications and on the financial planning profession as a whole.**

To submit a nomination for the Donald J. Johnson Award, 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 6.5 to write the Letters of Support.

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

## 2. NOMINATION CRITERIA

Nominees for the Donald J. Johnston Award will be assessed against the following criteria:

### 1. FP Canada Fellow

The nominee must be an FP Canada Fellow.

### 2. Profound contribution and positive impact on FP Canada certifications and on the financial planning profession as a whole.

The nominee must have:

- a. demonstrated leadership and had a tangible, far-reaching impact on the profession and the public it serves by inspiring increased industry, advisor and/or consumer recognition of the

importance of financial planning and the positioning of FP Canada certifications as the standard to which planners must be held to properly serve the public interest;

- b. made a significant direct contribution in support of the work of FP Canada; and
- c. had a positive impact on the end users of financial services or the industry and organizations through which these services are widely offered.

### 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 tenure over which the nominee has demonstrated continuous contribution to FP Canada certifications and the financial planning profession as a whole; and
- the stature of the nominators and those providing Letters of Support.

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

**Given that the Donald J. Johnston Award is a prestigious distinction, the criteria for acceptance of new recipients are extremely high. As such, the Donald J. Johnston Award 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®, QAFP®) or FP Retired status or a Pl.Fin. designation.
6. Current FP Canada staff, Board 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 ensure the information it contains is accurate.
2. Nomination Packages must include the following:

- a. a nomination form completed by the nominators (Sections 6.1 – 6.4);
  - b. a Letter of Support from each nominator (Section 6.5);
  - c. at least one and up to three additional Letters of Support from third parties across industry sectors and/or stakeholder groups, and outside the nominee’s own business and/or family, to demonstrate the nominee’s fulfilment of the nomination criteria; and
  - d. 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. Demonstration of Profound Contribution and Positive Impact on FP Canada's Certification(s) and the Financial Planning Profession as a Whole

### Key Accomplishments:

Outline the activities in which the nominee has:

- a. demonstrated leadership and had a tangible, far-reaching impact on the profession and the public it serves by inspiring increased industry, advisor and/or consumer recognition of the importance of financial planning and the positioning of FP Canada certifications as the standard to which planners must be held to serve the public interest;
- b. made a significant direct contribution in support of the work of FP Canada; and
- c. had a positive impact on the end users of financial services or the industry and organizations through which these services are widely offered.

#	ACTIVITY	YEARS
1		
2		
3		
4		
5		

#	ACTIVITY	YEARS
6		
7		
8		

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

### 6.3. Professional Career

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

EMPLOYER	POSITION	YEARS (FROM-TO)

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.	

#	KEY ACCOMPLISHMENTS*
7.	
8.	

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

#### 6.4. Awards and Other Distinctions

List relevant awards and other distinctions held by the nominee, beginning with the most recent. As noted above, nominees must be an FP Canada Fellow to qualify for the Donald J. Johnson Lifetime Achievement Award in Financial Planning.

#	AWARD OR DISTINCTION	ORGANIZATION	YEAR	COMMENTS
1				
2				
3				
4				
5				
6				
7				
8				



## 6.5. 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.

At least one and up to three additional Letters of Support from third parties across industry sectors and/or stakeholder groups, to demonstrate the nominee's fulfilment of the nomination criteria must also be submitted.

Letters 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 author's relationship to the nominee;
- b. address the nominee's fulfilment of the two nomination criteria:

### **FP Canada Fellow**

The nominee must be an FP Canada Fellow.

### **Profound contribution and positive impact on FP Canada certifications and on the financial planning profession as a whole**

The nominee must have:

- i. demonstrated leadership and had a tangible, far-reaching impact on the profession and the public it serves by inspiring increased industry, advisor and/or consumer recognition of the importance of financial planning and the positioning of FP Canada certifications as the standard to which planners must be held to properly serve the public interest;
  - ii. made a significant direct contribution in support of the work of FP Canada; and
  - iii. had a positive impact on the end users of financial services or the industry and organizations through which these services are widely offered.
- c. be specific and provide details on the significance and tenure of the nominee's profound contribution and positive impact on FP Canada certifications and the financial planning profession as a whole;
  - 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 for the Donald J. Johnston Lifetime Achievement Award in Financial Planning 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
- At least one and up to three additional Letters of Support from third parties across industry sectors and/or stakeholder groups, to demonstrate the nominee's fulfilment of the nomination criteria
- Acceptance Form (**Section 7**) completed by the nominee.

## 9. SUBMISSION PROCESS

**The nomination deadline for the Donald J. Johnston Lifetime Achievement Award is May 20, 2024.** FP Canada will not consider 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 and nominees 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](mailto:awards@fpcanada.ca).

### SUBMIT YOUR COMPLETE NOMINATION PACKAGE BY EMAIL TO:

[awards@fpcanada.ca](mailto:awards@fpcanada.ca)