



FP CANADA INSTITUTE PROFESSIONAL EDUCATION PROGRAM ASSIGNMENT AND ASSESSMENT MARKER VOLUNTEER POSITION DESCRIPTION

Are you...

- A current CFP® professional looking to earn Verifiable CE credits?
- An expert in the complexities of financial planning?
- Eager to contribute to and help shape your profession?

If this sounds like you, consider volunteering as an FP Canada Institute Professional Education Program Assignment and/or Assessment Marker. In this challenging and rewarding role, you'll play a vital part in evaluating the knowledge and readiness of the next generation of CFP and QAFP professionals.

What to Expect?

As a marker, you'll mark the practice assignments and/or final assessment for the CFP Professional Education Program, QAFP Professional Education Program and/or QAFP-to-CFP Certification Bridge Program. FP Canada staff will train and effectively prepare you to conduct this rigorous and important work.

You might expect to spend approximately 3 to 4 hours a month marking assignments and to participate in approximately two week long marking sessions for the professional education program assessments.

Benefits of Participating

As Professional Education Program Assignment and Assessment Marker, you'll:

- Receive 25 CE credits in the Financial Planning category and a \$500 honorarium;
- Gain a deeper knowledge of the financial planning competencies and body of knowledge that differentiate you from your peers and colleagues;
- Build your resumé with activities that contribute to advancing the profession;
- Play a role in the evolution of CFP and QAFP certification in Canada; and

- Support students in developing holistic financial planning and professional skills.

Eligibility Requirements

To be eligible to take part, you must be a CFP professional with a minimum 10 years client facing financial planning work experience and:

- An interest in education and assessment standards;
- A willingness to work collaboratively;
- A commitment to enhancing your own skills; and
- Extensive financial planning expertise, preferably with specialty knowledge in one or more of the following areas: financial management, asset management, risk management, tax planning, retirement planning and estate planning.

Apply Now

If you are interested in this opportunity, please email Kelly Becken at kbecken@fpcanada.ca to apply. Please include a cover letter and current resumé or CV that includes the following information:

- Current job responsibilities;
- Accomplishments in the field of financial planning and specialist expertise;
- Current or previous volunteer involvement with FP Canada;
- Any potential conflicts of interest;
- Professional references; and
- Preferred session.

Selection Process

As an applicant, you will be asked to gain appropriate and sufficient knowledge of the course content and assignments. You must also be free of conflicts of interest. You will be expected to sign and adhere to a Confidentiality Agreement and an Acceptable Use Policy.

Don't miss out on this unique opportunity to support students at a critical step along the path to FP Canada certifications.

Thank you for your interest in this volunteer opportunity. If you have any questions, please email Kelly Becken at kbecken@fpcanada.ca.