

# STANDARDS PANEL

## VOLUNTEER POSITION DESCRIPTION

### Are you...

- A current CFP® professional with experience with standard setting, professional oversight or compliance?
- A member of the public with experience with standard setting, professional oversight or compliance and an understanding of the financial services sector?
- An expert in the practice of professional financial planning?

If this sounds like you, consider volunteering as a Standards Panel member for the FP Canada Standards Council.

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*The Standards Panel is currently recruiting for new CFP professional member with expertise in the use of technology in the provision of financial planning.*

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### What to Expect?

The Standards Panel oversees the standards of the profession including the *FP Canada Standards Council Standards of Professional Responsibility*, the FP Canada Standards Council Competency Profile and Projection Assumption Guidelines through oversight of the Projection Assumption Guidelines Committee.

The Standards Panel convenes three (3) to four (4) times per year, both in-person in Toronto, and by video-conference.

### Benefits of Participating

As a member of the Standards Panel, you will:

- Be eligible for up to 23 CE credits annually in the category of Financial Planning, 2 CE credits annually in the category of Professional Responsibility, and up to five CE credits annually in the category of Giving Back;
- Set the standards for the profession and promote the oversight of professional financial planning in the public interest;
- Build your résumé with activities that contribute to advancing the profession;
- Network and collaborate with other CFP professionals; and
- Enhance your understanding of the expectations of FP Canada certificants in providing professional financial planning to Canadians.

## Eligibility Requirements

The Standards Panel is comprised of not less than eight (8), and up to ten (10) members at any time, including:

- FP Canada-certified individuals;
- Planificateur financier (Pl. Fin) certified individuals; and
- A public member.

No member of the Standards Panel shall have a substantiated complaint or disciplinary history with FP Canada, or a disciplinary history with another regulator, professional body or self-regulatory organization.

Preference for composition of the Standards Panel shall be given to:

- Previous experience on a professional discipline panel or as an adjudicator in compliance, where you would be expected to interpret and apply standards or rules;
- Expertise in technology in the provision of financial planning;
- Individuals with extensive financial planning experience, represented across multiple financial planning areas;
- Representation from multiple sectors of the financial services industry; and
- Geographic, gender and cultural diversity.

## Application Process

New appointments shall be recommended by the President & CEO, vetted by the Board Development Committee, and approved by FP Canada's Board of Directors.

Thank you for your interest in this volunteer opportunity. If you have any questions, please email [Francine Mitrakos](#).