



MEDIA RELEASE

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FPSC Recognizes Outstanding Achievements in Financial Planning During 10th Annual Financial Planning Week

TORONTO, ON – November 21, 2018 – Financial Planning Standards Council (FPSC) is pleased to announce that Dawn Hawley, CFP®, has been awarded the Donald J. Johnston Lifetime Achievement Award in Financial Planning. The award was one of several awards presented at FPSC’s annual Celebration of the Profession Dinner in Toronto on Tuesday, November 20th, as part of the 10th annual Financial Planning Week.

The Donald J. Johnston Lifetime Achievement Award in Financial Planning is named for the late Donald J. Johnston, who led FPSC 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 Lifetime Achievement Award in Financial Planning is the highest honour bestowed by FPSC, recognizing a lifetime advancement of CFP certification and significant positive impact on the financial planning profession. Given that the criteria for this award are extremely high, it is not awarded every year.

Hawley, a financial planner with the Angus Watt Advisory Group – National Bank Financial in Edmonton, has more than 35 years of experience in the financial planning profession. With a longtime passion for the profession, Hawley has advocated for rigorous standards through a variety of her professional and volunteer activities. Among other achievements, she most recently served as Chair of the FPSC Board of Directors from 2015 to 2017, serving eight years as a Board member in total. Hawley also served on FPSC’s Professional Practice Working Group, which played a key role in the development of the Financial Planning Body of Knowledge for FPSC Level 1® Certificants in Financial Planning and CFP professionals. In 2017, Hawley was awarded FELLOW OF FPSC™ distinction.

“I am honoured to receive the Donald J. Johnston Lifetime Achievement Award in Financial Planning,” says Hawley. “I strongly believe in the positive impact that professional financial planning has on the wellbeing of Canadians and I’ve been proud to devote much of my career to this fantastic profession.”

As is customary to further recognize this prestigious honour, FPSC will make a \$10,000 donation in the award winner’s name to one or more charitable organizations of their choice. Hawley has selected the Financial Planning Foundation and the Edmonton Community Foundation as recipients of the donation.

FPSC also recognized two new FELLOW OF FPSC recipients at the Celebration of the Profession Dinner: Aurèle Courcelles, CFP and Professor Kwok Sum Ho, CFP. Created in 2011, FELLOW OF FPSC distinction is a lifelong honour that recognizes individuals who have helped advance FPSC's purpose as well as advance CFP professional standards, and who have embodied these standards throughout their careers.

Courcelles, Assistant Vice-President, Tax and Estate Planning with the Advanced Financial Planning division at IG Wealth Management, has actively advocated for broader adherence to the Standards of Professional Responsibility throughout his career, and has influenced many financial advisors to pursue CFP certification. He has also volunteered extensively with FPSC, as a member of the FPSC Level 1 Exam Panel for seven years and as a member of the CFP Professional Competency Profile Task Force in 2016.

Professor Ho, an Associate Professor of Finance at the School of Administrative Studies at York University, has made significant contributions to the financial planning profession through his research, writing and education of the next generation of financial planners. This includes designing and teaching an FPSC-Approved Core Curriculum course at the School of Administrative Studies at York University and co-authoring a financial planning textbook that has been widely adopted by universities and colleges across Canada.

President's List honourees were also recognized at Tuesday's event for top performance on the CFP examination. This honour recognizes candidates who achieved the three highest marks out of hundreds of exam writers in each of the June and November exams administered across the country annually. To qualify to write this standardized six-hour exam, candidates must have first successfully completed an FPSC-Approved Core Curriculum education program, the FPSC Level 1 Examination in Financial Planning and an FPSC-Approved Capstone Course. Successful CFP examination candidates with three years of relevant work experience are then eligible to apply for CFP certification, the only globally recognized mark of financial planning professionalism.

President's List honourees for the June 2018 exam are Katelyn Culliton from Waterloo, Ontario (1st place); Blair Evans from Winnipeg, Manitoba (2nd place tie); and Neal Kongkham from London, Ontario (2nd place tie). For the November 2017 exam, honourees are Nathan Wood from Calgary, Alberta (1st place); Travis Allen from Kitchener, Ontario (2nd place tie); and Wes Cowlshaw from Saskatoon, Saskatchewan (2nd place tie).

Financial Planning Week runs until November 24, 2018. Other FPSC events during Financial Planning Week include the Ethics Breakfast and the CFP Professional Symposium, taking place in Toronto on November 21 and in Vancouver on November 23.

About Financial Planning Standards Council

A professional standards-setting and certification body working in the public interest, FPSC's purpose is to drive value and instill confidence in financial planning. FPSC ensures those it certifies—CERTIFIED FINANCIAL PLANNER® professionals and FPSC Level 1® Certificants in Financial Planning—meet appropriate standards of competence and professionalism through rigorous requirements of education, examination, experience and ethics. There are more than 18,500 Financial Planners in Canada who have met, and continue to meet, FPSC's standards. More information is available at FPSC.ca and FinancialPlanningForCanadians.ca.

About CFP Certification

CERTIFIED FINANCIAL PLANNER® certification is the most widely recognized financial planning designation in Canada and throughout the world and is considered the standard for the profession. CFP® professionals have demonstrated the knowledge, skills, experience and ethics to examine their clients' entire financial picture, at the highest level of complexity required of the profession, and work with their clients to build a financial plan so that they can Live Life Confidently™. CFP professionals in Canada are certified by FPSC. There are approximately 16,500 CFP professionals across Canada, part of an international network of more than 175,000 in 26 territories around the world.

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