

RECOGNITION AS A  
FELLOW (FCPA) OF THE  
CHARTERED PROFESSIONAL  
ACCOUNTANTS OF ONTARIO

[CPAONTARIO.CA/FELLOWS](https://CPAONTARIO.CA/FELLOWS)



NOMINATION FILE 2022

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# Welcome

The Council of the Chartered Professional Accountants of Ontario (CPA Ontario) elect members as Fellows, designated by the initials FCPA, to formally recognize those who have rendered exceptional services to the profession and within their communities. The Fellows distinction is the highest honour conferred upon our members.

This document will guide you through the process of nominating a member of CPA Ontario to be considered by the FCPA Selection Committee of CPA Ontario's Council for recognition as a Fellow.

**Step One.** Please review this document in full.

**Step Two.** Please complete the nomination file by following the instructions for each section. We encourage you to review this sample nomination file, designed to help you with the quality and quantity of information to provide.

**Step Three.** Save your nomination package with the nominee's name. Then, email your completed nomination package as an attachment, along with the required supporting documentation and any other documentation you wish to include, to: [fcpa@cpaontario.ca](mailto:fcpa@cpaontario.ca).

You will receive an automated email to confirm we have received your nomination.

After reviewing your package, a **second** confirmation email will be sent notifying you of completion or any issues. All completed submissions will be forwarded to CPA Ontario's FCPA Selection Committee

**Note:**

We ask that you complete, save and submit this document in Microsoft Word or Adobe PDF, along with your supporting documents.

**\*\*\*ZIP files are NOT accepted. Please send multiple emails if the files are too large, and label accordingly\*\*\***

All qualifying nominations received by the deadline will be considered by the FCPA Selection Committee, who will make recommendations to CPA Ontario's Council.

The deadline to submit nominations is **Sunday, July 31, 2022**. All nominees and nominators will be notified of the results by October 2022. If you have any questions about the process, please email [fcpa@cpaontario.ca](mailto:fcpa@cpaontario.ca).

# Admission Criteria

## Nature of Achievements Under Review

Nominators must highlight the candidate's leadership and the exceptional nature of the candidate's performance in the following fields of activity:

- **Professional career;**
- **Volunteer involvement** within the accounting profession; and
- **Volunteer contribution** to professional, community, or charitable organizations.

While it's not necessary that the candidate has made exceptional contributions, or demonstrated leadership in all three areas, the nomination file should demonstrate that the candidate has made a remarkable contribution in more than one area, and that their contributions are known to others.

In addition, nomination files must highlight that candidates clearly identify themselves as Chartered Professional Accountants (CPAs) and that they are known and recognized as CPAs.

**Please note** that volunteer activities refer to unpaid activities only; paid activities should be included under the professional career field.

## Content of the Nomination File

Nominators are responsible for ensuring that the nomination file is complete and that the information it contains is accurate and sufficient to allow the FCPA Selection Committee to evaluate the nomination.

The recommendations of the FCPA Selection Committee and the decisions of the Council will depend on the care taken to describe the member's achievements. You should, therefore, clearly indicate the businesses, organizations and committees in which the member has been involved, publications they have contributed to, been featured in or authored, and any professional accomplishments, as well as the relevant dates.

It is expected that nominees agree and sign-off on the nomination package to ensure accuracy and completeness of the nomination file prior to submission.

## Exceptions

All members of CPA Ontario, including those working outside Ontario, are eligible to become a Fellow.

The following persons are not eligible to become Fellows:

- Members already elected to Fellow in any of the three legacy bodies (CA, CGA or CMA) as they have all been deemed Fellows of CPA Ontario;
- Members who have been the subject of a disciplinary decision resulting in their being struck off the roll of a professional body or a similar organization;
- Members who have been struck off the roll or whose right to engage in professional activities has been suspended by CPA Ontario under its Code of Professional Conduct;
- Members who are currently subject to a limitation or suspension of their right to engage in professional activities;
- Members who are the subject of a jurisdictional inquiry or who are being prosecuted before the civil or criminal courts; and

- To avoid any perceived conflict of interest, CPA Ontario employees, members of the FCPA Selection Committee, and members of CPA Ontario's Council are not permitted to nominate members or to be nominated to become a Fellow, but they are eligible to do so once they have left the employ of CPA Ontario or the FCPA Selection Committee, or have served their term on Council.

Notwithstanding the general principle and the exceptions set out above, jurisdictions may accept a nomination after taking the relative weight of the offence into account. To do so, CPA Ontario must consider in particular:

- The seriousness of the offence and the penalty imposed;
- The length of time between the date the penalty was imposed and the submission of the nomination; and
- The media coverage of the case.

# Nomination File for the Title of Fellow (FCPA)

Two nominators are required to nominate a candidate, and each must be a member of CPA Ontario (FCPA or CPA) or the submission will not be accepted. Each nominator is required to provide a letter to the FCPA Selection Committee explaining why they have nominated the candidate, as part of the nomination package.

Please complete the nomination file by following the specific instructions for each section and filling in the information directly on the document.

We, the undersigned, members of CPA Ontario, nominate the following member for the title of Fellow (FCPA):

Name of Nominee	Ms. Jane Doe
Address	4455 South Street, Yourtown, ON, L4C 9X9
Telephone	555-555-5555
Email Address	jdoe@gmail.com
Member Number	#99999

This member has earned exceptional distinction in their professional career and in the community by acknowledged achievements that bring honour to the profession. For each of the eligibility criteria for the title of Fellow, we have outlined below the most outstanding achievements of the member and we have attached all relevant supporting documents. The nominee agrees and signs off with the submission.

We hereby officially declare having ascertained that the information contained in this file is accurate and sufficient to allow the FCPA Selection Committee to evaluate fairly the nomination file. We are aware that the Committee may have the main facts in support of this nomination validated by an outside source.

Name of First Nominator	Member Number	Telephone	Email Address
Priya Kumar	#543210	555-111-2222	pkumar@gmail.com

Name of Second Nominator	Member Number	Telephone	Email Address
Sally Smith	#87654321	555-999-9898	ssmith@gmail.com

## Section 1: Professional Career

Describe the environment(s) in which the candidate worked throughout their career and for each item, you must highlight the candidate's leadership and the outstanding nature of their performance. You must demonstrate that the candidate's exceptional contribution is common knowledge (i.e., that the acknowledged achievements make the member a recognized leader due to the quality of his or her significant contribution in more than one of the fields of activity listed).

### Main stages of professional career

Describe the candidate's career path, beginning with the current position or, if the candidate is retired, the last position held.

	Employer	Position	Years: from/to
1.	XYZ Management Consulting LLP	President	2010 – present
2.	Tech ABC Inc.	Vice-President – Administration and Finance	2003 - 2009
3.	Government Division Organization	Senior Director of Auditing Committee Member	1998 - 2002
4.	Life Insurance Company	Director	1992-1997 (1994-1995)
5.	National Company	Senior Manager	1988-1991

### Major achievements in professional career

Describe the achievements showing that the candidate has made an exceptional or remarkable contribution and highlight the way these achievements earned the candidate distinction.

**Major achievements:** (Please match the numbers to those above)

1.	<p>Jane was invited to merge her practice with XYZ Management Consulting LLP in 2010 and for over 10 years has worked to develop the firm's reputation as an independent accounting firm that is known for its broad range of specialized services, infallible customer focus and its development of Accountants with Personality.</p> <p>As a CGA, Jane joined five existing CA Partners at XYZ Management Consulting LLP in 2010 as a Principal of the firm, and played a part in formulating and implementing an aggressive strategy that has grown the firm from a \$2 million to a \$12 million practice with 14 Partners and 80+ employees to date.</p> <ul style="list-style-type: none"> <li>• In her first 5 years with the firm, Jane developed her sole proprietor practice into a \$1 million multi-faceted tax and advisory practice, retaining client relationships she had built in her previous practice and building new long-term relationships.</li> <li>• With the changing information exchange and tax compliance landscape in mind and a drive to continually provide exceptional service to her clients, Jane pre-empted the need for a specialized international tax service. After dispersing 30% of her clients across the practice, she spent the next 5+ years building an entrepreneurial Cross-Border tax planning practice. Building this new Cross-Border Tax division, focusing on advising individuals and businesses on international tax obligations primarily Canada to US exchanges, was a diversification strategy that has led to a \$1 million, and growing, specialized practice with clients from around the world.</li> <li>•</li> </ul>
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2.	<p>During her six years as Vice President – Administration, Jane also contributed significantly to the growth and profitability of the company. She served as the right hand to the CEO for the company's strategic planning and in positioning Tech ABC Inc. in both Canada and the U.S.</p> <ul style="list-style-type: none"> <li>• Jane showed extraordinary leadership for all of the company's information technology (IT) activities (annual budget of \$2 million), as well as managing the Tech ABC Inc.'s cash flow and credit, as well as overseeing litigation. Her responsibilities included managing all financial reports as well as financing for the organization. She was an active leader on both the senior management and acquisition teams.</li> <li>• Jane completed the acquisition of WAM Distribution in 2003 (one of her greatest achievements to date), which quadrupled the company's U.S. sales. She designed and implemented the entire WAM acquisition structure and the strategy surrounding this acquisition, including the financing (syndicated credit facility of \$410 million).</li> <li>• Jane supervised the tax planning, the implementation of strategies and oversaw the preparation of tax returns. She established an internal audit group and oversaw the implementation of procedures and controls to meet new requirements for certification by management. She also presented investment projects (acquisitions, major capital expenditures, new business segments) for approval by the CEO and the Board.</li> <li>• Jane participated in all the acquisitions made by the company, both on the administrative, financial and informational sides, and on the monitoring of operations, in addition to creating synergies between the purchase, marketing and logistics departments.</li> <li>• M. Bellow (letter #3): <i>Among Jane's notable professional achievements, I would stress her roles in the implementation of a growth strategy for the company to continue to grow in a mature industry. Through acquisitions, including those she has driven since 2004, the company now earns 65% of its revenues of \$1.3 billion in the US, where it now has the majority of its employees.</i></li> <li>• M. Holt (letter #4): <i>Her vision, leadership, communication skills and sound business judgment has ultimately allowed her to ascend to the position of Vice-President – Administration and Finance. In particular, I would like to stress Jane's strategic involvement in the acquisitions that enabled Tech ABC Inc.'s strong penetration into the US market.</i></li> </ul>
3.	<p>In her role as Senior Director of Auditing Committee Member at Government Division Organization, Jane was appointed by the President of the Audit Committee. She is the Financial Expert on the Committee and in this role, she provides the CEO with advice on the sound management of the Organization.</p>
4.	<p>During her time as controller at Life Insurance Company, sales increased from \$70 million to \$180 million, due to several acquisitions. Jane first negotiated and then managed \$600 million of debt resulting from the company's change of control in 1995.</p> <ul style="list-style-type: none"> <li>• She completely restructured and refinanced a \$60 million debt to increase its credit facility limit to \$80 million. These changes in the borrowing mix helped to reduce costs by almost 1% on the average use in excess of \$50 million, bringing an annual savings of about \$400,000. The increase in the credit facility also provided the financial flexibility to allow for expansion by acquisitions.</li> <li>• Jane also participated actively in the acquisition of three US companies generating sales volume of \$45 million. She led the due diligence, negotiations with vendors and drafting legal documents and, supervised the administrative integration of acquired entities.</li> <li>• Jane improved both the accuracy of interim financial information and the timeliness of its preparation.</li> </ul>
5.	<p>National Company is a multinational corporation operating mainly in robotics, power, heavy electrical equipment, and automation technology areas. As the Director for National Company in Canada, Jane lead the team and provide excellent customer service support with effective management activities.</p> <p>Some of the many highlights for Jane included the following:</p>



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| <ul style="list-style-type: none"><li>• Establish, build, and maintain long-term customer relationships in order to improve the Company's opportunities for sales and profits, ensure customer satisfaction and provide effective responses to customer requirements</li><li>• Implement management activities according to the global product roadmap</li><li>• Prepare accurate forecasts to ensure maximum availability of resources and products</li><li>• Improve product delivery, consumption control and stock value by identifying existing products in stock</li><li>• Lead and coordinate the sales and execution efforts of the product team</li><li>• Ensure a strong focus on maximizing profits and prices by proper price setting and price reviewing according to National Company</li><li>• Oversee the inventory management activities in line with National Company procedures and targets</li></ul> |
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## Section 2: Volunteer Involvement in the Affairs of the Accounting Profession

List the main committees, task forces or working groups of which the candidate has been a member; the events or activities in which they took part; and in what capacity (member, chair, organizer, speaker, etc.). Note that teaching or paid activities should be included in the professional career section.

	Committees/task forces/working groups/events/activities	Organization	Position	Years: from/to
1.	Governance Committee	CPA Ontario Legacy Body	Chair Chair Member	2014 to date 2013-2014 2009-2012
2.	IFRS Committee	National Entity	Member	2007-2009
3.	Examinations Committee	Legacy Body	Member	1999-2005

### Major achievements during involvement in the affairs of the profession

Describe the achievements showing that the candidate has made an exceptional or remarkable contribution and highlight why you think these achievements earned the candidate distinction.

**Major achievements:** (Please match the numbers to those above)

1.	<p>As Chair, Jane led the Governance Committee in a major revision of regulations related to general meetings, elections and regional representation on the Council.</p> <p><i>M. Langley (letter #6): Jane's vast expertise and experience in governance were major assets for CPA Ontario's governance review. As an effective leader and consensus builder, she played a key role in ensuring that the Committee's approach received the continued support of the Council and CPA Ontario's executive team. Her commitment to continuous improvement helps keep CPA Ontario at the forefront in governance.</i></p>
2.	<p>Jane was a highly valued participant on the Accounting Standards Accounting Standards Board's (AcSB) IFRS Advisory Committee, which was comprised of experts in accounting standards from all walks of life, including big firms, the Ontario Securities Commission and industry. During her two years of service, Jane provided well- considered views during meetings on the challenges facing industry, including:</p> <ul style="list-style-type: none"> <li>• The importance of having standards that are as practical as possible to make their application easier;</li> <li>• The strategic need to converge her national body views with those of the OSC in respect of interpretations in order to help facilitate implementation; and</li> <li>• The critical importance of clear, concise communications between standards setters and financial statement preparers to help ensure that the new standards are easily understood by users.</li> </ul> <p><i>M. Ding (letter #7): Jane stands out from all of her colleagues with her creativity and ability to identify innovative solutions. Her views on the practice of accounting contribute to the development and advancement of the profession on an ongoing basis.</i></p>
3.	<p>Through her comprehensive understanding of the issues and related risks, Jane was able to contribute significantly to the committee's decision making and help it take advantage of opportunities and effectively deal with challenges on a timely basis.</p>

<p>M. Paint (letter #8): <i>Jane is an outstanding collaborator, both in terms of the design and the development of the program. Her professionalism is impeccable. She contributes positively to discussions in every respect.</i></p>
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## Section 3: Volunteer Contribution to Professional Bodies or to Community/Charitable Organizations

List the candidate's most important volunteer activities with civic, community, socioeconomic, professional or charitable organizations, beginning with the most recent.

	Organization	Position	Years: from/to
1.	Symphony Orchestra – City Y	Chair	2012-2014
2.	Ontario Games – Region X 2012	President	2010-2012
3.	Cross Country Skiing Cup – Region X	Vice-President	2005-2009
4.	150th Anniversary – City Y	President	2000-2003
5.	City Y – Under the Snow Festival	President	1997-2000
6.	Chamber of Commerce City Y	President Board member	1995-1996

### Achievements during involvement with these organizations

Describe achievements showing that the candidate has made an exceptional or remarkable contribution and highlight why you think these achievements earned the candidate distinction.

**Major achievements:** (Please match the numbers to those above)

1.	<p>Symphony Orchestra – City Y: In 2012, the Orchestra had a deficit of more than \$200,000 and was on the edge of insolvency. Following major pressure from its creditors who hoped that Jane's leadership would be able to turn things around, Jane agreed to take on the Presidency of the Orchestra in mid-term. She immediately created and implemented an aggressive turnaround plan that included hiring a new CEO and Maestro. Through her concerted efforts, the deficit has now been eliminated.</p>
2.	<p>Ontario Games - Region X 2012: Before being officially appointed President of the Ontario Games - 2012 Region X, Jane had contributed significantly to the efforts to have Region X selected to host the Games.</p> <p>Three years of volunteer work by Jane and her team led to the welcoming of 3,200 athletes, 1,000 coaches and 15,000 visitors to Region X in March 2012. The challenges were numerous: infrastructure, logistics, security, recruitment, scheduling, media relations, etc. Jane succeeded on all fronts by committing 20 hours of volunteer time every week for three years over and above the significant demands of her 'day' job.</p> <p>At the budgetary level, the pressure for success with no deficit increased as the Games approached. With an overall budget of \$6 million, it was with great pride that Jane announced a surplus of \$50,000 following the Games' conclusion.</p> <p><i>M. Lester (letter #9): Her involvement and motivation were greatly appreciated. Her determination and initiatives allowed this major event to become an unprecedented success. Jane believes in and is committed to her community and, sincerely wants to help not only from time-to-time but, on a consistent basis over the long term.</i></p>
3.	<p>Cross Country Skiing Cup – Region X: is a championship event for future professional young athletes under the age of 25. It is the only championship outside Europe.</p>

	<p>As Vice President of this organization for 4 years, Jane was able to increase awareness of the event and the entire region through increased promotional efforts. With an annual budget of \$600,000, Jane successfully managed the event to a small surplus every year.</p>
4.	<p>Celebrating the 150th anniversary of City Y: This 2002 event was very important for the region. Spread over 52 weeks with about five activities per week, it took more than two years of planning, in collaboration with the Premier of Ontario and a deputy minister. This event not only increased City Y visibility, it increased visibility for Ontario</p> <p>Jane also managed this event's \$5-million budget to a small surplus by volunteering more than 30 hours a week to ensure its success.</p> <p>Mr. Bath (Letter #10): <i>I was totally impressed by her qualities and professionalism during this great adventure. Everyone in our region admires Jane's charisma and determination.</i></p>
5.	<p>City Y – Under the Snow Festival: This is a very popular winter activity that offers the public the opportunity to see ice sculptors in action. Jane has chaired this event for three consecutive years and, under her leadership, the event has been well attended and its program diverse. Averaging 130,000 visitors, the event is a beautiful winter showcase for the city attracting visitors from all over Ontario.</p> <p>With a budget of \$700,000, Jane has managed to produce surpluses between \$2,000 and \$40,000 each year.</p>
6.	<p>Chamber of Commerce City Y: Jane was a member of the Board for six years before becoming President. During this time, she was instrumental in developing the Chamber of Commerce. She was also responsible for organizing a large trade fair which provided for the promotion of local products and manufacturers.</p> <p>As President, her main achievement was generating a record 22% increase in Chamber membership. In addition to generating a surplus of \$35,000 during her term as President, Jane was the impetus behind the Leaders Summit.</p>

## Section 4: Letters of Support

Nominators are responsible for submitting a minimum of four letters in support of the nomination: one letter from each of the nominator's and two letters from additional sources which may include colleagues, peers, employers, etc. The quality of endorsement is crucial to the decision process and as such, all letters of support should adequately highlight the candidate's leadership and the exceptional nature of the candidate's performance.

Please submit all letters in a PDF format, along with the completed nomination file. Any nomination files that do not have the required four letters of support will be considered incomplete and will not be assessed by the FCPA Selection Committee. Letters of support will be accepted unsigned, but it is preferred that they be signed or have an e-signature.

Please list the letters of support and identify their sources.

**Total number of letters of support: 4**

Letter No.	Last name	First name	Position	Employer
1.	Bradshaw	Bernard	Board Chair	Enterprise Premium Inc.
2.	Lamby	John	Partner	3DM firm
3.	Bellow	Mike	V.P.	HBIG Bank
4.	Holt	Paula	Board Chair	Executives Association

## Section 5: Ambassador for the Profession

Clearly show how the candidate identifies themselves as a CPA and is recognized as such. Examples may include a LinkedIn profile, business card or profile on employer website, or mention in a publication. You may attach any supporting documentation.

I confirm that the nominee clearly identifies as a CPA and is recognized as a CPA, thereby making a positive impact to the profession.

**Please explain briefly:**

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**List of any attached supporting documents:**

Candidate's business card


**Press clippings: (please specify)**

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**Annual report: (please specify)**

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**Other: (please specify)**

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## Section 6: Awards, Titles, or Honorary Distinctions

List all awards, titles, or honorary distinctions, beginning with the most recent.

Award: Excellence - Business	Organization: CPA Ontario	Year: 2013
Comments: This award recognizes the outstanding contribution of a CPA who, with his/her expertise, leadership and understanding of the business, has obtained amazing results that deserve to be recognized outside the scope of the organization for which he/she works.		

Award: Merit Region X	Organization: Newspaper B	Year: 2007
Comments: This award is for conspicuous and sustained service resulting in significant achievements and/or contributions on behalf of the Region.		
Jane's exceptional ability to balance work, family and volunteering has been demonstrated over her many years of service at the highest levels, highlighted by her brilliant leadership of the Ontario Games.		

Award: Honors Award	Organization: City Y	Year: 2003
Comments: This award is given to local volunteers who best presented themselves on the provincial scene. Many well-known personalities have received this award in the past.		

Award: Ontario Award	Organization: Girl Guides	Year: 1995
Comments: The Ontario Award is presented to adult members for extended dedicated service in any facet of Guiding (e.g. significant contributions to her Administrative Community/Provincial Specialty Community/Province/wider community, exceptional leadership, enabling opportunities to girl and youth members to practise leadership skills, living by the ideals of the Guiding Promise and Law; positive role model within and out of Guiding and well respected by Guiders and the broader community).		
Jane's service commitment to the organization continued long after her daughter was a Girl Guide.		

Award:	Organization:	Year:
Comments:		



## Section 7: Acceptance of Nomination by Nominee

I, Jane Doe hereby agree to allow my name to stand in nomination for the 2021 selection of Fellows of CPA Ontario

I authorize the FCPA Selection Committee to investigate my background and education, including internal CPA Ontario records, for the purpose of evaluating my nomination for recognition as a Fellow of CPA Ontario. I consent to participation in the review process being used to identify the candidates whose achievements and exceptional services to the profession have earned them distinction and brought honour to the profession.

I certify that all the information contained in the nomination package is verifiably true and that I meet the eligibility requirements to be a Fellow set out therein, namely that the following categories of ineligibility do not apply:

- Members already elected to Fellow in any of the three legacy bodies (CA, CGA or CMA) as they have all been elected as Fellows of CPA Ontario;
- Members who have been the subject of a disciplinary decision resulting in their being struck off the roll of a professional body or a similar organization;
- Members who have been struck off the roll or whose right to engage in professional activities has been suspended by CPA Ontario under its Code of Professional Conduct;
- Members who are currently subject to a limitation or suspension of their right to engage in professional activities;
- Members who are the subject of a jurisdictional inquiry or who are being prosecuted before the civil or criminal courts; and
- Current CPA Ontario employees, members of the FCPA Selection Committee, and members of CPA Ontario's Council.

**Nominee Signature:** \_\_\_\_\_

**Date:** [MONTH] [DATE], 2022

# Final Steps

## Submission Checklist

The nomination file, which includes any supporting documents must be emailed to [fcpa@cpaontario.ca](mailto:fcpa@cpaontario.ca) by July 31, 2022.

- ✓ You have completed the nomination file and saved it as a Microsoft Word or Adobe PDF document

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- ✓ You have obtained four letters in support of your nomination: one from each nominator and two from additional sources, saved as PDFs

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- ✓ The nominee has reviewed and signed-off on the nomination package, including Section 7: Acceptance of Nomination by Nominee

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- ✓ You have compiled your nomination package to include the nomination file and letters of support in either Word or PDF format. If possible, you have consolidated all supporting documentation into one file and saved the file as the name of the nominee

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## Submission Instructions

- ✓ To submit the nomination package: Open up a new email, browse your computer for the Word and/or PDF file(s) you have prepared, click “Attach” as prompted and attach the file(s) as necessary

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- ✓ Send the email to [fcpa@cpaontario.ca](mailto:fcpa@cpaontario.ca); if the email message is too large, send multiple emails with the nominee’s name in the subject line. **Zip files will not be accepted**

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Once submitted, you will receive an automated email to confirm we have received your nomination. After reviewing your package, a **second** confirmation email will be sent notifying you of completion or any issues. All completed submissions will be forwarded to CPA Ontario’s FCPA Selection Committee.

The deadline to submit nominations is **Sunday, July 31, 2022**.

### Contact Information:

If you have any questions, please email [fcpa@cpaontario.ca](mailto:fcpa@cpaontario.ca).