# FP Canada™ Research Foundation Funding Application

Thank you for your interest in pursuing Research Funding from the FP Canada Research Foundation. Please complete all sections of the application to facilitate its review and decision making by the FP Canada Research Foundation Board of Directors.

**Please submit your application electronically in PDF format to:**

Joan Yudelson, Executive Director, FP Canada Research Foundation at [researchfoundation@fpcanada.ca](mailto:researchfoundation@fpcanada.ca).

*Please note: It is the responsibility of the Principal Applicant (PA) to ensure the application has been received in good form.*

**SECTION 1: APPLICANT INFORMATION**

1. Provide complete contact details for the Principal Applicant. In addition, provide a recent resume with details on past published research as a separate attachment:

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|  |  |  |  |
| Title | Last, First | Position | Department |
|  |  |  |  |
| Street Address | City | Province | Postal |
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| Email | Telephone | Fax |  |

1. Provide complete contact information for the Administrating Institution:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of Administrating Institution

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Name of Contact at Administrating Institution

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| Street Address | City | Province | Postal |
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| Email | Telephone | Fax | |

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Signature of Contact at Administrating Institution

1. Provide complete contact information for the Financial Officer at Administrating Institution – or indicate if the Principal Applicant will act as the Financial Officer:

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| --- | --- | --- | --- |
|  |  |  |  |
| Title | Last, First | Position | Department |
|  |  |  |  |
| Street Address | City | Province | Postal |
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| Email | Telephone | Fax | |

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Signature of Financial Officer

1. Name of research proposal:

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1. Summary of proposal – Describe the objectives of your research, problem, gap or opportunity it addresses.

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1. Describe similar projects undertaken by the applicant’s organization and the extent to which performance goals were stated and achieved.

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**SECTION 2: RESEARCH PROPOSAL REQUIREMENTS**

1. Alignment of Research Priorities – The FP Canada Research Foundation's funding priorities include the development and dissemination of two types of research:

* Research (Technical or Behavioural) that serves to enhance the practice of financial planning delivered to Canadians;
* Research that reflects the impact of financial planning on society

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Indicate which research priorities your research is supporting:

1. Opportunity to Impact Canadians:
   1. Outline how your research will help elevate financial planning practice in Canada?

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* 1. Check off the communicaton platform(s)/ method(s) that you support for dissemination of your research results.

Media Press Release

Media Engagements

Social Media

Participation on an FP Canada Panel/Webinar

Video

Publication in Peer-reviewed Journals

Podcast

Other (explain below):

* 1. Explain your plan for the dissemination of your research results, including the use of the above communication platforms and methods and how you see working with FP Canada Research Foundation to disseminate your research results.

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1. Research Methodology – Provide the details of your proposed research methodology and sampling framework, the feasibility of your proposed methodology, the rationale for your proposed methodology and contingency plans should your methodology not be realistically achievable. Include any existing research and literature that you may be relying on for your research.

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1. Research Plan:

Identify the proposed start date for research: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Identify the proposed date for submission of your final research report: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Identify key deliverables to the FP Canada Research Foundation, purpose and content of the deliverables and associated timelines:

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| --- | --- | --- |
| **Key Deliverables** | **Purpose/Content of Deliverables** | **Timelines** |
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1. Team Composition – Please provide the following:

* A description of the research team (if applicable).
* Contact details for any co-applicants. Provide a recent CV for any co-applicants as a separate attachment.
* An explanation if or why a team approach is appropriate for the proposed research, outlining the relative roles, responsibilities and contributions of the PA, as well as each co-applicant;
* The relative proportion (in percentages) of each team member’s contribution to the proposed research.
* An Outline of your contingency plan in the event one or more team members may be unable to provide the level of support originally planned.

1. Budget:
   1. Please provide a complete detailed budget in a separate attachment that breaks down the following expenditures:

* Non-salary costs (including sample costs, programming surveys, rental of survey or other platform);
* Salary costs (including the number of individuals and salaries for each);
* Equipment and supplies; and
* Field costs (including intended field partners, incentive costs, etc.).

Note: Explain if there is a difference between articulated costs and the requested funding amount.

* 1. Provide the details of any additional funding that has been requested from another source:

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| --- | --- |
| **Amount** |  |
| **Source** |  |
| **Funding Period** |  |
| **Date Funding Provided** |  |
| **Funding Term/Duration** |  |

* 1. Provide the details of any alternative funding being sought:

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| --- | --- |
| **Amount** |  |
| **Source** |  |
| **Funding Period** |  |
| **Expected date of decision on alternative funding** |  |
| **What is the contingency plan in the event this funding is not approved?** |  |

**SECTION 3 – AGREEMENT TO TERMS**

**The FP Canada Research Foundation reserves the right to approve or decline any requested research proposals. The FP Canada Research Foundation also reserves the right to ask any applicant for additional information regarding their research program or for relevant references.**

We, the undersigned have reviewed and understand the policies outlined in the FP Canada™ Research Foundation Research Policy Manual and understand that any grant will be conditional on additional terms outlined in the FP Canada™ Research Foundation Funding Agreement.

Signature/Approval indicates acceptance and willingness to carry out the work as described in the proposal, with respect of the various regulations and ethics regarding such work and within the established budget of the proposal. All research activity will be undertaken in accordance with the policies and procedures of the FP Canada Research Foundation. The Principal Applicant also accepts responsibility for any over expenditure on the award, for reporting any changes or delays in the research, and to complete all reporting required on time.

**Signature of Principal Applicant: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

If applicable, signatures of the Dean indicate awareness of the research project and acknowledgement that the academic unit/faculty will be able to accommodate the space requirements.

**Signature of Dean: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**