

**CFA SOCIETY SAN DIEGO'S**

# **MENTOR PROGRAM**

## **MENTORS**

EXPERIENCED CFA SOCIETY  
SAN DIEGO MEMBERS

## **MENTEES**

NEW CHARTERHOLDERS &  
LEVEL III CANDIDATES

## **RELATIONSHIP**

3 MONTHS IN LENGTH  
TWO MEETINGS MINIMUM PER MONTH  
30 MINUTES PER MEETING  
MENTEE TO SET AGENDA PRIOR

## **PLATFORM**

### **PLAN**

MAKE A PLAN, SET  
GOALS, CONFIRM  
AVAILABILITY, &  
BOOK MEETINGS

### **CONNECT**

SEND MESSAGES,  
MAKE CALLS, & SETUP  
VIRTUAL MEETINGS IN  
ONE PLACE

### **SUCCEED**

ACCESS RESOURCES,  
HONE SKILLS, &  
MAKE A DIFFERENCE

# MENTEE FAQ

## **What are the mentee participation requirements?**

*Currently, the Mentoring Program is open to Level III Candidates and New Charterholders mentees.*

## **What is the role of a mentee?**

*Mentees are expected to absorb knowledge and guidance from their mentors, make a plan once matched, set SMART goals, create the agenda for each meeting, and be respectful of their mentor's time.*

## **What is the role of a mentor?**

*Mentors are expected to act as a trusted advisor, serve as a resource, problem-solve through challenges, provide guidance to their mentee, and be respectful of their mentee's time.*

## **Why should I participate in the mentor program?**

*With advice and guidance from your mentor in key developmental areas, you will have the opportunity to enhance your skill development, learn about other areas of interest, and work toward developing your full potential in the investment industry.*

## **How will I be matched with a mentor?**

*Once you create your profile and identify key development areas and competencies, you will search for the best-matched mentor based on specific profile criteria and you will select him/her and send an official invite directly from the platform. Mentors will then have the option of accepting or declining the invite.*

## **Will all mentees be paired with a mentor?**

*Each cohort will depend on the number of mentee applications received and the availability of the mentors. There is a possibility that not all mentees will be paired with a mentor in any given application cycle.*

# MENTEE FAQ

## Can mentees have more than one mentor?

*No, the program is set up to be a one-to-one matching process.*

## How much time should I commit?

*The commitment is three months, with a suggested minimum of 1 hour per month in meetings.*

## Do I have to set up goals with my mentor?

*While goal setting is required, please keep in mind that it has many different forms. Mentees can set career goals, professional development goals, or mentoring relationship goals. Make sure you discuss your plans for goal setting early in your mentoring experience.*

## Do I have to meet in person with my mentor or can it be done online?

*This is up to the mentor and mentee to decide when completing the Mentor Agreement and determining the preferred meeting format.*

## What should we discuss during our monthly meetings?

*Mentees, with guidance from their mentor, are expected to set initial goals. Once goals are established, mentees are expected to set an agenda for each meeting and send it to their mentor at an agreed-upon time prior to each meeting. Common areas for discussion include skill development, career guidance, and professional growth.*

## Where can I find the documents and information I need during my Mentoring Program partnership?

*All current Mentoring Program participants will have access to the Resources section of the MentorCity platform. Here, participants will find important and helpful documents as well as a discussion forum they can use to communicate with other participants about mentoring matters.*

# MENTEE FAQ

## **I'm new to being a mentee. Will guidance be provided?**

*CFA Society San Diego's Mentoring Program Committee is dedicated to providing you with guidance to ensure you make the best of your relationship. Please contact our Managing Director at [staff@sandiego.cfasociety.org](mailto:staff@sandiego.cfasociety.org).*

## **Is there anyone I can contact if my mentor and I cannot establish a productive relationship?**

*Our Mentoring Program Committee is dedicated to helping you make the most out of your mentoring relationship. If you have any concerns, please email our Managing Director at [staff@sandiego.cfasociety.org](mailto:staff@sandiego.cfasociety.org).*

## **Can I continue my relationship longer than 3 months?**

*Of course! Beyond the 3-month mark, mentor/mentee relationships can continue informally and separate from the platform.*