

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

MENTOR FAQ

What is the role of a mentor?

Mentors are expected to act as a trusted advisor, serve as a resource, problem-solve through challenges, and provide guidance to their mentee.

Why should I participate in the mentor program?

You will grow as a manager and coach, helping you in your day to day interactions with your colleagues and clients. Mentors will experience the rewards of helping another person reach their goals and may have the opportunity to develop a new perspective and gain additional insight into their own paths and values.

How will I be matched with a mentee?

Mentees will search for the best-matched mentor based on specific profile criteria (developmental areas, specialized skills, and competencies) and select him/her by sending an official invite directly from the platform. Mentors will then have the option of accepting or declining the invite.

Will all mentors be paired with a mentee?

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

Can a mentor have more than one mentee?

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

How much time should I commit?

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

MENTOR FAQ

Do I have to meet in person with my mentee 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.

I'm new to being a mentor. Will training 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.

Is there anyone I can contact if my mentee 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.

MENTOR FAQ

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.

Can I be paired with another mentee automatically at the end of the 3-month program?

Yes. The platform will prompt you to complete an evaluation at the end of the program, where we will ask you if you would like to re-apply for another 3-month program. Please indicate your interest to be matched again.