

MENTORSHIP PROGRAM - FAQ

1. Can a CFA Society Vancouver volunteer or director apply to be a mentor or mentee?

Yes. Any member of CFA Society Vancouver who is a CFA charterholder and a member in good standing with the Society can apply to be a mentor or mentee.

2. I am a Level III candidate in the CFA Program? Can I apply to be a mentor or mentee in the Mentorship Program?

The Mentorship Program is currently designed for CFA charterholder members only. The program may be opened to candidates in future years.

3. I have passed all three levels of the CFA Program and I am presently only a year or two away from fulfilling the work experience required to obtain the charter. Can I apply to be a mentor or mentee in the Mentorship Program?

The Mentorship Program is currently designed for CFA charterholder members only. The program may be opened to candidates and charter pending members in future years.

4. Is the Mentorship Program a good way to job search?

The program is not designed to be used as a job search opportunity by mentees or a recruiting platform by mentors. Mentors are encouraged however, to provide career guidance, recommend courses and workshops and facilitate professional introductions where appropriate to assist their mentee's career development.

5. I met an experienced CFA charterholder at a recent Society event. Can I request for him or her to be my mentor?

Mentors and mentees will be matched by the CFA Society Vancouver Mentorship Committee through a formal matching process based on the applications received. Special considerations will be given to factors such as work experience and career objectives. However, a specific mentor cannot be requested by a mentee or vice versa.

6. Can I apply to be both a mentor and a mentee in the Mentorship Program?

Yes. However, applicants should be mindful of the time commitment required to fulfill both roles if they are successfully paired as both a mentor and a mentee.

7. As a mentee, am I guaranteed to have a mentor who will only be mentoring me?

The goal of the CFA Society Vancouver Mentorship Committee is to facilitate one-to-one mentoring relationships. There may be unique cases where a mentor is matched with more

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than one mentee. In all cases, the confidentiality between each pairing will be maintained and the quality of the mentoring provided will be at the highest level possible.

8. Is it possible that my mentor may be located in a different province?

All CFA Society Vancouver mentors will be located in the Lower Mainland.

9. What does the time commitment over the year look like?

All successful applicants are required to attend a 90 min “Break the Ice” Training Session in December. Once the program officially begins January 1, you can expect on average 1.5 – 2 hours per month. This includes meeting prep time, meetings and the completion of a check in survey each quarter.

10. Do all mentor-mentee meetings have to be in person, or are telephone conversations allowed?

While face-to-face meetings are strongly encouraged, the Mentorship Committee understands that mentor and mentee schedules may not allow every meeting to occur in person. In such instances, conducting meetings via phone or Skype is acceptable.

11. Does the Mentorship Program offer great networking opportunities?

There are 1-2 social events hosted for program participants during the year that are designed to bring everyone together and share best practices. Apart from these, the program is definitely a one-on-one affair.

12. I attended the Information Session in September and recall that there were only 12 pairings last year. Based on the number of attendees at the Information Session and knowing there will also be other applications coming in from those not in attendance, are my chances of being accepted into the Program low?

All attendees are strongly encouraged to apply. The actual number of pairings will depend on the number of applications received.

13. If I apply to be a mentee and I am unsuccessful in being matched this year, will I receive priority next year?

Yes. Priority will be given the following year to all mentees we are unable to match in the current year of the Program.