

2026 Mentorship Program

INFORMATION SHEET

TIME COMMITMENT

Program Duration

January 1 to December 31, 2026

"Break the Ice" Program Workshop

January 8, 2026 - In person - 1.5 hours.
Mandatory attendance for all 2026 Program mentors and mentees.

Face to Face Meetings (Virtual or In-Person)

At least one hour per calendar quarter.

Other Communication

At least once a month.

To the Mentorship Committee

Responding to check in communication at the end of the first quarter from your appointed Program Liaison via email or phone. Completion of wrap up survey at the end of the year.

Other Events

Program pairings are encouraged to attend society events and networking socials together as schedules allow.

IMPORTANT DATES

OCTOBER 24, 2025 - 5PM

Application Deadline

For both mentor and mentee applicants.
Late applications will not be accepted.

DECEMBER 9, 2025

Pairing announcements sent via email

All applicants will be notified of their application status.

JANUARY 8, 2026

"Break the Ice" Program Workshop

In Person - 3:00 pm - 4:30 pm

Mandatory session for all 2026 Program participants. This facilitated training session is designed to help our pairings align expectations and build an impactful mentorship relationship.

ELIGIBILITY

MENTEE: CFA Society Vancouver Charterholder member, LIII Candidate member or Charter Pending member

MENTOR: CFA Society Vancouver Charterholder Member

YOU COULD BE A MENTEE IF YOU:

- Recognize that mentoring is a valuable tool for professional development and growth
- Are receptive to feedback and guidance from your mentor and are willing to implement his or her suggestions
- Are striving to reach the next stage in your career or may be considering a transition to a different position/sector in the finance profession
- Can be a proactive and enthusiastic participant in meetings with your mentor
- Are a good listener and can hold conversations in the strictest confidence
- Can commit to the program requirements as described in the TIME COMMITMENT column

YOU COULD BE A MENTOR IF YOU:

- Wish to contribute to the professional community in a direct and highly rewarding way
- Have the inclination and expertise to support and guide a mentee, and are open to sharing insights and experiences gleaned from your career
- Are willing to take an active role in your mentee's career development by helping with career decisions, imparting industry knowledge, and (where necessary) facilitating introductions to CFA Society Vancouver members and other experienced professionals
- Are a good listener and communicator, and can hold conversations in the strictest confidence
- Can commit to the program requirements as described in the TIME COMMITMENT column

Please note that the Mentorship Program is not designed to be used as a recruiting platform by mentors or as a job search opportunity by mentees.



**CFA Society
Vancouver**

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PAIRING PROCESS

Mentor-mentee pairings are facilitated by the CFA Society Vancouver Mentorship Committee through a very personalized matching process. The application forms are designed to give the committee the best sense of each applicant – from career history and objectives to personal interests. Mentee applicants can expect a brief phone interview from a pairing committee member. All information collected influences the pairing process. While every effort is taken to match as many applicants as possible, pairing is not guaranteed. The number one priority is to find the strongest fit possible.



PROGRAM SUPPORT

CFA Society Vancouver staff and Mentorship Committee volunteers serve as the program coordinators and provide support to mentors and mentees. The support will consist of:

- **Mentorship Program Workbook** – offering an overview of roles and responsibilities, tips for building the relationship, meeting suggestions, giving (and receiving) feedback and much more.
- **Program Liaison** – each pairing will be appointed a committee member to be the program contact and resource for both mentor and mentee.
- **April Check In** – conducted by our committee Program Liaisons. During the one-on-one check in, mentors and mentees will be asked to share experiences and key learnings from Q1 and be open to sharing any challenges.
- **Career Development Presentations and Workshops** – the Mentorship Committee is committed to passing on career development topic suggestions from the mentorship cohort to the Programs Committee. Where applicable, priority registration to career development events will be offered to Mentorship Program participants.

HOW TO APPLY

Application forms for mentors and mentees are available on-line via links on the CFA Society Vancouver website <https://www.cfasociety.org/vancouver/membership/mentorship-program>.

Deadline: 5pm, October 24, 2025.

PROGRAM CONTACT

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