



Mentee Application

Please fill out the below form and email to Mentor.Program@cfaustin.org between October 1 and November 15, 2024. Questions? Email mentor.program@cfaustin.org or executivedirector@cfaustin.org

Note: The Mentoring Program is to explore, discover, and develop personal and professional goals. For additional career tools, please visit the CFA Society of Austin website's Career Tools section.

Applicant Name: _____

If applicable, Job Title: _____ Company Name: _____

Preferred Email Address: _____

Have you passed level II of the CFA Program and are a member of the CFA Society Austin*?
(Yes/No): _____

* These are minimum qualifications to participate as a mentee.

Education (University, Degree(s), Graduating year(s)): _____

Professional Designation(s) (CFA, CPA, CAIA, FRM, CIPM, etc.): _____

Name and business of current (or most recent) employing entity: _____

Job Title: _____

Start date and end date of position (if applicable): _____

Please provide a brief job description: _____

Name and business of next most recent employing entity, if applicable: _____

Job Title: _____

Start date and end date of position: _____

Please provide a brief job description: _____

Areas of Interest: _____

Why do you want to participate in this program? _____

Do you have an industry segment/role preference (ex: institutional sales), or other considerations, concerns or comments? _____

To help manage any potential conflicts of interest on behalf of your employer or other parties, please list any specific or type of organizations of mentors/mentees that you prefer to not be paired with. An example could be a mentor who works for an asset manager that may be paired with a mentee who works for a client (or prospect) of the asset manager.

Response: _____

If admitted into the program, by signing below I commit to participate fully in the program, get to know my mentor, be open to exploring areas of interest, and maintain a professional demeanor, respect & confidentiality:

Signed: _____

Date: _____