



## Mentor Application

Please fill out the below form and email to [Mentor.Program@cfaaustin.org](mailto:Mentor.Program@cfaaustin.org) between October 1 and November 15, 2024.

Questions? email [mentor.program@cfaaustin.org](mailto:mentor.program@cfaaustin.org) or [executivedirector@cfaaustin.org](mailto:executivedirector@cfaaustin.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: \_\_\_\_\_

Are you a CFA Charterholder or experienced industry professional, a CFA Austin Society Member, and do you have at least five years of work experience\*? (Yes/No):

\*These are minimum qualifications to serve as a mentor.

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 skills, expertise and network: \_\_\_\_\_  
\_\_\_\_\_

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/protégés that you prefer to not be paired with. An example could be a mentor who works for an asset manager that maybe paired with a protégé 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 mentee, be open to exploring any area of interest, and maintain a professional demeanor, respect & confidentiality:

Signed: \_\_\_\_\_

Date: \_\_\_\_\_