

INVEST IN HER FUTURE

MENTEE GUIDE

The mentorship program is a 3-6 month commitment but can be continued at the discretion of the mentor and mentee. Meetings are recommended to be held once a month either in-person, over the phone, or via videoconference, but can be tailored to the preferences of the mentor and mentee.

WHAT TO EXPECT

The mentorship program is:

- ✓ A developmental tool—Expands knowledge, networks, and prepares for future career growth
- ✓ A knowledge sharing opportunity—Provides awareness of opportunities and activities that can broaden education and skills
- ✓ **An organizational culture enhancer**—Helps mentees better understand operations, policies, and culture in the workplace

The mentorship program is not:

- ✗ A guarantee of an employment offer or career enhancement
- ✗ Replacement for traditional career training (internship, co-op)
- ✗ Replacement for formal education

FIRST MEETING CHECKLIST

Prior to your first meeting, clearly define your goals and expectations for your mentoring relationship:

- What do you hope to gain?
- What role do you expect your mentor to play?
- Are there any topics of urgent interest?

During your first meeting:

- Get to know your mentor—find out what your mentor's interests are outside of work; ask them about their career history
- Clarify your roles and responsibilities
- Share your development goals, priorities, and career interests
- Establish formal meeting schedules and preferred ways of communicating

Discuss the following to create an action plan:

- Your strengths and short- and long-term development needs
- Items of interest, current challenges, and recent successes
- Action items to be completed before the next meeting

YOUR ROLE INCLUDES:

- Being accountable for scheduling meetings and following up with your mentor
- Coming to your meetings prepared with a clear idea of what topics or issues you want to address
- Being open to constructive criticism/feedback and asking for it
- Following up on action items discussed during meetings
- Informally communicating on a regular basis with your mentor

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MENTEE DISCUSSION GUIDE

Planning conversations can help ensure you make the most of your time together; Refer to the topics and questions below to help guide thoughtful discussions with your mentor.

MENTORS PROFESSIONAL BACKGROUND AND EXPERIENCE

- What drove the decision to choose this industry?
- What has their career path and progression looked like? How did they get to their current position?

INDUSTRY/WORKPLACE TOPICS

- What are some key industry trends and current events shaping the workforce?
- Ask your mentor to walk you through different career paths on the institutional and retail side of the business.
- What does their work/life balance look like? What are their thoughts on in-office, hybrid, remote work?
- Request an overview of various department functions and roles within the mentor's company.

YOUR CAREER OBJECTIVES / PROFESSIONAL GOALS

- Skill building (i.e., knowledge based skills, soft/personal skills)
- Offer your student resume, cover letter, LinkedIn profile for review/feedback
- Discuss your upcoming career fair your approach/strategy to attending
- Work on your 30 second commercial / elevator pitch
- Interviewing advice
- Job offer negotiation tactics
- Networking tips and advice
- How to build a personal and professional brand
- Graduate School and continuing education paths (i.e., CFA, CAIA, CPA, CIMA, etc.)