



CFA SOCIETY SAN DIEGO MENTOR PROGRAM

FREQUENTLY ASKED QUESTIONS

What is mentoring?

Mentoring is a professional relationship in which an experienced person (the mentor) assists another (the mentee) in identifying and developing specific skills and knowledge that will enhance their professional and personal growth. A mentorship relationship should be a learning experience for both parties and should not be a one-sided dialogue. The mentor-mentee relationship can, and preferably will, exist outside one's chain of command and normal business interactions. This will allow for more candid discussions and the sharing of perspectives influenced by diverse experiences and knowledge.

What are the responsibilities of a Mentor?

Mentors should understand the mentees expectations and goals for the mentorship relationship and serve as a resource, sounding board and guide. The following are among the mentor's functions:

- Ask the mentee questions as opposed to providing them the answers
- Teaches the mentee about a specific issue or topic
- Coaches the mentee on a particular skill
- Facilitates the mentee growth by sharing resources and networks
- Challenges the mentee to move beyond his or her comfort zone
- Creates a safe learning environment for taking risks
- Focuses on the mentee's total development

What are the responsibilities of a Mentee?

Mentees should be responsible for guiding the progression of the relationship. Mentees should identify what they hope to gain from the relationship and share those expectations with their mentor. Mentees should be respectful of time and understand that a mentor may be unavailable from time to time. Mentees are responsible for staying professional and courteous and will maintain the confidentiality of the internal operations of the mentor's organization (for example, if they are invited to attend an internal department meeting to observe policymaking in action).

What are the potential benefits of the Mentorship Program for CFA San Diego?

Mentoring benefits the organization, mentors and mentees. A successful mentoring program benefits CFA Society San Diego by:

- Enhancing strategic business initiatives
- Encouraging membership recruitment and retention
- Enhancing professional development
- Linking members with valuable knowledge and information to other members in need of such information
- Using fellow members, instead of outside consultants, as internal experts to offer professional guidance to membership
- Creating a culture which continuously promotes individual member growth and development

What are the potential benefits of the Mentorship Program for Mentors?

- Gains insights from the mentee's background and history that can be used in the mentor's professional and personal development
- Gains satisfaction in sharing expertise with others
- Reenergizes the mentor's career
- Gains an ally in promoting the organization's well-being

What are the potential benefits of mentoring for Mentees?

- Leverage the mentor's experience, expertise and network as resources
- Receives critical feedback
- Develops a sharper focus on what is needed to grow personally and professionally
- Learns specific skills and knowledge that are relevant to their goals and aspirations
- Networks with a more influential member
- Has a friendly ear with which to share frustrations as well as successes

Who can participate in the Mentorship program?

All CFA Society San Diego members are eligible to participate.

How much time does the Mentorship program take?

The Mentorship program is scheduled over the course of six months with two CFA Society San Diego Facilitated meetings and four independent meetings to be conducted during that time. Although there is no set duration or timing of the independent meetings, it is suggested that a 1-2 hour meeting be scheduled monthly and that the Mentor and Mentee discuss the need for any other "check-in" meetings or phone calls during the course of the Program. Additionally, although it is not required, it is highly recommended that the Mentor and Mentee attend a non-Mentorship program related event together during the 6-month program.

How are Mentors and Mentees matched?

Mentees' applications and Mentors' profiles are reviewed and pairs will be matched based on industry, experience, interests and location.

Does the Mentorship program lead to a job or an internship?

The Mentorship program involves no promise of future employment. However, this program vigorously promotes professional networking, and many opportunities arise naturally from these connections. That being said, Mentees should not enter the program solely for the purpose of finding a job. Mentees should not pressure their Mentors to inquire about open positions or pressure their Mentors to circulate resumes within their professional network.

Do I need to apply to be a Mentor?

No, but we do ask that you complete the Mentor questionnaire so that we can build your Mentor profile. If you are interested in serving as a Mentor, please contact programs@sandiego.cfasociety.org.

Do I need to apply to be a Mentee?

Yes, all Mentee's are required to apply to be considered for the Mentorship program given that there are only a limited number of spots available per program cycle. Please see a copy of the Mentee application below and submit your completed application directly to programs@sandiego.cfasociety.org.

Who do I contact with questions about this program?

You can contact programs@sandiego.cfasociety.org.