



MENTEE PROFILE QUESTIONNAIRE

The Mentorship Program has been designed to provide a formal structure for CFA Society San Diego members to engage one another and develop constructive and beneficial mentor-mentee relationships. It is our goal that the Program will serve as a foundation from which these relationships can grow and continue after its conclusion. The Program will last approximately 6-months and will consist of a Program Orientation/Mentor-Mentee Mixer, 4 one-on-one Mentor-Mentee meetings and a Program Conclusion Meeting facilitated by CFA Society San Diego staff.

Please Print.

1. Name and email: _____

2. Educational background: _____

3. Are you a CFA charterholder? _____

4. Please describe your current professional role. _____

5. How many years of professional experience do you currently have? _____

6. Briefly describe your past professional roles: _____

7. Please list and describe two professional specializations that you are currently interested in pursuing or would like to explore through the program? _____

8. Why do you want to participate in the Mentorship Program (i.e. new job, growth within company, career transition, etc.) _____

9. What are your expectations for the Mentorship Program? What do you hope to achieve? _____

10. What do you consider important qualities for a mentor? _____

11. Please indicate if you are willing and able to commit to the required time constraints of the program (Program Orientation TBD location and November 2024 timing), 4 outside meetings to be agreed upon when paired with mentee, 1 final CFA survey meeting)?

12. Please indicate your preferred Mentor/Mentee meeting location. _____ N. County _____ USD / Downtown area _____ Escondido Area _____ East County _____ South Bay _____ Virtual meeting

13. Please indicate if there are specific days or times that work best for monthly meetings:

14. Would you be willing to share your resume or brief bio with potential Mentees and the Mentorship Subcommittee to assist in the matching process?

_____ Yes, see attached _____ No

15. Please provide any additional information you think would help in the matching process. (e.g., professional and/or personal interest / experience) _____

