



### **Take Ownership of the Relationship**

Mentees are expected to drive the relationship. This includes initiating contact, setting meeting agendas, and following up on action items. For the most effective conversations, mentees should arrive prepared with clear goals and questions.

### **Set Clear Goals Early**

Before your first meeting, reflect on what you hope to gain. Whether it's career guidance, skill development, or expanding your network, clearly articulating your goals will help set the course for successful discussions.

### **Discuss Mutual Expectations**

Mentors and mentees should agree on a schedule that works best for both of you. The most important thing is to discuss your mutual expectations about time and communication at the start of your relationship.

### **Be Respectful and Open**

Respect your mentor's time and experience. Be open to feedback and willing to explore new perspectives. Understand that the relationship may conclude or evolve over time.

### **Communicate Consistently**

Regular check-ins help maintain momentum. Use each session to reflect on progress, adjust goals, and deepen the relationship.

### **Prepare and Follow Through**

Come to meetings with an agenda and take notes. Afterward, send a summary of key takeaways and next steps. This shows initiative and reinforces accountability.

Have questions or need assistance with your mentoring match? Contact Member Services at [membership@tx.cpa](mailto:membership@tx.cpa) or call us at 800-428-0272.