



# PROFESSIONAL MENTORSHIP PROGRAM

## OVERVIEW

### **Professional Mentorship Program**

#### **Purpose**

In support of, and as an ongoing commitment to, the CFA Society Cincinnati's mission to provide its members continuing education and networking opportunities and to raise awareness of the CFA Program, the Mentorship Committee (the "Committee") proposes to establish a Mentorship Program (the "Program").

The Program is designed to connect members of the CFA Society Cincinnati with more experienced members of our organization and offer a framework to enable professional growth, build knowledge, expand networks, and open avenues to acquiring career and industry insights all within an atmosphere of confidentiality, trust, and respect.

#### **Program Foundation**

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 his or her professional and personal growth. A mentorship relationship should be a learning experience for both parties, encourage candid discussions, and facilitate the sharing of perspectives influenced by diverse experiences and knowledge.

The focus of each mentoring relationship should be inspired by the objectives expressed by the mentee and can, for example, range from developing or refining skills and setting career goals to navigating challenges and managing time. In other words, it is driven by the mentee and supported by the mentor who can listen, discuss, and offer feedback/advice in a trusting and collaborative environment. In turn, mentors can cultivate their coaching and leadership skills—and share in the successes of their mentees.

Mentoring is not based on expectations of job-specific training or placement, or of friend-matching; rather, a mentor is a coach, active listener, role model, and voice of experience. To build a foundation of trust, expectations are that conversations between the mentor and mentee remain confidential.

## **Benefits**

Mentoring benefits the CFA Society Cincinnati, mentors and mentees alike. A successful mentoring program benefits CFA Society Cincinnati by:

- Encouraging membership recruitment, retention, and engagement
- Enhancing professional development
  
- Linking members with valuable knowledge to other members in need of such information
- Creating a culture which continuously promotes individual member growth and development

### **Mentor Benefits**

- Opportunity to enhance leadership, coaching and communication skills that are portable across one's career
- Chance to give back to the investment community and make a positive impact on the next generation of investment professionals

### **Mentee Benefits**

- Gain new perspectives on the industry and how to accomplish individual goals
- Meet other experienced members of the Society
- Obtain long-term career and skill development advice

## **Responsibilities**

### **Mentor Responsibilities**

- Mentors should understand their mentee's expectations and goals for the relationship and serve as a resource, sounding board and guide. The following are among the Mentor's key functions:
  - Asks the Mentee thoughtful questions
  - Teaches the Mentee about a specific issue or topic
  - Coaches the Mentee on a particular skill
  - Facilitates Mentee growth by sharing resources and networks
  - Challenges the Mentee to move beyond his or her comfort zone
  - Focuses on the Mentee's total development
  - Maintains confidentiality
  - Communicates any issues to the Committee

### **Mentee Responsibilities**

- Mentees should be responsible for guiding the progression of the relationship. The following are the Mentee's key responsibilities:
  - Identifies what they hope to gain from the relationship and shares expectations with their Mentor
  - Reaches out to their Mentor to schedule sessions
  - Considers preparing an agenda of key topics to be discussed ahead of time
  - Respects the Mentor's time and remains flexible around scheduling
  - Engages in active, thoughtful dialogue
  - Communicates any issues to the Committee

### **Eligibility**

- **Mentor Eligibility:**
  - Active CFA Society Cincinnati Member
  - At least eight years of work experience (or otherwise at the Committee's discretion)
- **Mentee Eligibility:**
  - Active CFA Society Cincinnati Member. This can be a regular or affiliate member.

### **Administrative Framework and Expectations**

- **Program Period:** The Mentorship Program will run from September – May each year. Mentor / Mentee meetings are expected to begin in November.
- **Program Kick-Off & Orientation:** CFA Society Cincinnati will host a networking event, virtual or outdoor, that will include a Program overview presentation and an opportunity for Mentors/Mentees to meet and greet. All prospective Mentors and Mentees should attend. Current timeline anticipates an early September (post-Labor Day) date.
- **Application:**
  - Prospective Mentors and Mentees will each submit an application and resume for review by the Mentorship Committee. If necessary, an applicant may be interviewed to facilitate the matching process.
  - Applications are expected to be accepted through **Friday, October 3, 2025** and may be found on the CFA Society website.

- **Matching:** Mentor-Mentee matches will be made by the Mentorship Committee. The Committee will consider pairing preferences submitted following Program Orientation and based on similarities in professional backgrounds/interests and stated goals for the program. The Matching Process is expected to occur over an approximate two-week period following application submission. Target completion is mid-October with matches announced by the end of October.
  
- **Meeting Frequency:** Mentors/mentees should aim to meet at least four times from November through May. Mentoring pairs have the freedom to create a schedule that works for both participants and can meet more frequently than monthly, if desired. Mentoring pairs should try to meet in person insofar as possible, subject to current government health guidelines and conditions. Where in-person meeting is not feasible, pairs should seek to meet via video (e.g., Zoom, WebEx, etc).
  - We estimate the total time commitment to be approximately 5-7 hours over the course of the Program Period.
  - The mentoring relationship may be informally extended beyond the stated term, if mutually agreed upon.
  - Face-to-face meetings must be held in a public venue. Private residences, lake houses, or the like, may not be used for program meetings.
  
- **Program Closeout Process**
  - Wrap-up event will be scheduled at end of the Program in May
  - Mentor and Mentee will complete a short survey and submit any additional feedback
  - Mentorship Committee and Board will review feedback/survey results and approve any potential Program modifications at June meeting
  
- **Program Oversight:** Mentorship Committee oversees the Mentorship Program and will: ➤
  - Develop and maintain Program requirements, events and guidelines
  - Match mentors and mentees based on applications and interviews, if necessary. Consideration will be given to the following items:
    - Stated interests, career aspirations, and location
  - Send a survey to Mentors and Mentees at the end of the Program
  - Call each Mentee and Mentor in January or February to solicit feedback
  - Manage other day-to-day administrative questions – directed to Casey Jones or another approved designee
  - Solicit and manage Program Closeout feedback
  - *Note:* It is not the responsibility of the Mentorship Committee to schedule meetings between the Mentor and Mentee