



## **CFA SOCIETY CHICAGO MEMBERS ONLY MENTOR PROGRAM**

### **SUGGESTED MEETING SCHEDULE AND TOPICS**

Please note these topics are suggested guidelines for your meetings. If you identify other topics that work well for you and feel would be valuable to others, please share them with [nharris@cfachicago.org](mailto:nharris@cfachicago.org). We recommend that you try to have 4 of the 6 meetings in person (these can include the two CFA Society of Chicago facilitated meetings. Additionally, we suggest that the mentor and mentee attend a non-Mentorship Program CFA Society Chicago event together. This will be an opportunity for you to network together and provide subject matter (event topic) for you to recap and discuss at a following mentoring meeting.

#### **Program Orientation and Mentee-Mentor Mixer (CFA Society Facilitated Event)**

- Networking, program overview presentation, announcement of Mentor-Mentee pairs and opportunity for pairs to meet and begin planning for the program.

#### **Meeting #1 – Introductions**

- Continue the discussion from the Program Orientation:
  - Discuss both of your career and educational backgrounds
  - Discuss your goals and objectives for the mentoring program
  - Discuss what you both envision for the mentoring relationship
  - Decide on the best forms of communication for scheduling future meetings and staying in touch (e.g. telephone, e-mail)

#### **Meeting #2 – Professional Growth**

- Discuss 5-10 year goals and aspirations
- Discuss skills and on-going professional training that may be helpful to achieve these goals.
- Define and discuss “Success” and what it means to be “Successful”

#### **Meeting #3 – Work/life balance**

- Discuss the challenges in achieving work/life balance
- Create a plan for you to pursue professional success without sacrificing your personal/family life

#### **Meeting#4 – Leadership/Team Work**

- Discuss the importance of leadership and teamwork as it relates to success
- What challenges do you each face in being part of a team?
- What traits make a good leader?
- How can you improve your leadership skills?

#### **Meeting#5 – Upcoming Professional Challenges**

- Discuss issues faced over the course of this year and any you see on the horizon
- Discuss lessons that you each have learned from challenges met
- Discuss other topics not previously covered that you wish to share with each other

#### **Meeting #6 – Program Conclusion & Tips for the Future (CFA Society Facilitated Event)**

- 1st Half:
  - CFA Society Staff to host open forum for feedback and suggestions from participants
  - CFA Society Staff to provide tips for continuing a successful mentoring relationship outside of the program and share available resources
- 2nd Half:
  - Evaluate your mentoring partnership
  - Discuss what works and doesn't work in your mentoring relationship
  - Create a basic outline of how you will continue the relationship