

Objectives of the CFA Level 1 Mentor Program

The objective of the CFA Level I Mentor Program is to provide Level I candidates enrolled in the USC/CFALA Review Program an additional “support” resource in preparing for the Level I exam. The Program offers each candidate a chance to have one-on-one contact with a mentor who is either a current CFA charterholder or has successfully completed all 3 levels of the CFA exam. Most mentees find it helpful in their exam preparation to have mentors who can share exam strategies and study tips on what led to their own success.

Responsibilities of a CFA Level 1 Mentor

Mentors should contact their assigned mentees about once or twice a month at the outset of the Review Program (early February for the Spring Program and late August for the Fall Program), with more frequent contact the last month before the CFA exam. These are guidelines only. More or less frequent contact may be required depending upon the mentee’s needs and the mentor’s schedule. Most contact is expected to be brief, generally lasting less than ½ hour.

The "support" mentors provide should be more in line with emotional support, managing work and family obligations with study time, conveying their experiences, study tactics, etc. in preparing for the exam. Some of the questions that mentees are likely to ask are enumerated below. Physical meetings with mentees are optional, but contact should at least be by phone or email. With respect to questions on curriculum, mentors may field such questions if they wish to do the research themselves, or they can forward such questions to any of the Level I coordinators who will either answer the questions themselves or seek assistance from the lecturing professors. Most mentors defer technical questions to the Level I coordinators (see below for coordinator list). Mentors should take the initiative to contact their mentees since many of the mentees do not like bothering their busy mentors.

Mentees often ask mentors questions not related to the CFA exam. For example, many mentees may want to discuss various career paths and prospective jobs. Mentors are welcomed to conduct these discussions; however, this is not the primary objective of the Mentor Program and mentors are not obligated to provide assistance in these unrelated areas.

Sample Questions:

1. How many hours a week did you study? How did you study on weekdays versus weekends?
2. Did you study everyday or did you give yourself days off throughout the week?
3. How did you manage to stay on track? If you fell behind in your studying process, how did you catch up or how did you adjust your study habits?
4. Did you use prep course materials (e.g. Schweser)? If so, how did you coordinate the prep notes with the text readings?
5. Did you do all the sample questions at the back of the reading materials or study notes? If not, how did you integrate sample questions into your studying process?
6. Is it necessary to take the practice exams? If yes, how many did you take to prepare for the exam?
7. When did you begin to worry about speed when it came to answering practice questions?
8. How did you manage your study time? Did you adjust your study time based on familiarity of the subject matter?
9. Did you begin your study process before the USC/CFALA Review Program started?
10. Did you take any days off from studying during the months before the exam? If so, how many days did you take off and did you take them consecutively or on single days?
11. Did you have a study group? If so, how many members did you have and how did you coordinate topics? Did you practice questions as a group under test conditions?
12. How did you handle “bad” days where you either could not mentally or physically study due to fatigue?
13. Did you ever feel overwhelmed and if so, how did you regroup or refocus your study efforts?
14. What study tools did you find most/least helpful?

15. How much time did you allow yourself to go back and review all topics before the exam?

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