

## CFALA MENTORSHIP PROGRAM & APPLICATION FY 2023 - 2024

Welcome and thank you for your interest in the CFALA Mentorship Program!

Please note: this application is for **both** mentors and mentees. Completed applications should be sent via email to [info@cfala.org](mailto:info@cfala.org) with subject "CFALA Mentorship Program". By submitting your application, you are agreeing to the list of guidelines below.

This is a selective program in which you will need to be "**matched**" with a mentor/mentee in order to participate. **THERE IS NO GUARANTEE THAT YOU WILL BE MATCHED.** If you are matched, you will be notified in August and there will be an orientation event in early September. This event will include training for both mentors and mentees.

Please let us know if you have any questions. Thanks!

Roxanne Cheng

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Michael Koop

[mkoop1989@gmail.com](mailto:mkoop1989@gmail.com)

--Mentorship Program Co-Chairs

### **Critical Information:**

Application deadline: July 31, 2023

Program Duration: One year commitment – September 1, 2023 to August 31, 2024.

Requirements: **APPLICANTS MUST BE ACTIVE CFALA MEMBERS** at the time of application and pairing. Mentees are recommended to have at least 1 year work experience. Mentors are recommended to have a minimum of 10 years work experience in the financial services or academic fields.

### **Program Guidelines:**

- Make a personal commitment to making the time to meet at least once a quarter for one year, which can be virtual.
- Mentors and Mentees both commit to proactively stay in touch with one another throughout the year.
- Must keep the content of conversations confidential.
- Participate in the program orientation.

- Complete and submit a mentoring partnership agreement and goals task sheet.
- At the conclusion of program, provide feedback, and submit a program results sheet.

Are you interested in being a ☐ **Mentor** ☐ **Mentee**

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Email: \_\_\_\_\_ Member ID Number: \_\_\_\_\_

Preferred telephone number: \_\_\_\_\_ ☐ **mobile** ☐ **work** ☐ **home**

Title: \_\_\_\_\_ Name of Company: \_\_\_\_\_

*For Mentors only*, please provide description of current job function/work/department:

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Company Location: ☐ **Westside/South Bay** ☐ **Downtown** ☐ **SF Valley** ☐ **Pasadena/Inland**

Home Location: ☐ **Westside/South Bay** ☐ **Downtown** ☐ **SF Valley** ☐ **Pasadena/Inland**

*For both Mentors & Mentees*, Education (year, degree, and institution):

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*For both Mentors & Mentees*, Work experience (years, position, and industry):

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*For both Mentors & Mentees*, Please provide a brief job description of your current position:

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*For Mentees only*, what are your Career/work related goals and objectives?

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*For Mentees only*: What do you find exciting and interesting about your current work?

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*For both Mentors & Mentees, What are some goals that you hope to achieve by participating in this program?*

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*For both Mentors & Mentees, What types of people do you work best with?*

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*For both Mentors & Mentees, How would you describe yourself?*

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*For Mentors only, What previous experience with mentoring do you have, if any?*

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*For Mentors only – are you willing to mentor two mentees at the same time? \_\_\_ Yes \_\_\_ No*

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Current career field:    ☐ **Wealth Mgmt.**    ☐ **Asset Mgmt.**    ☐ **Capital Mkts.**    ☐ **Corp. Finance.**  
                                 ☐ **Alternatives**        ☐ **Other:** \_\_\_\_\_

Career fields of interest (if outside, your current field):    ☐ **Wealth Mgmt.**    ☐ **Asset Mgmt.**  
☐ **Capital Mkts.**    ☐ **Corp. Finance.**    ☐ **Alternatives**    ☐ **Other:** \_\_\_\_\_