Mentee Application

Please complete this application and attach a current copy of your CV and short bio to be considered for the CFA UK Mentoring Programme. Applicants will be notified regarding the status of their application by the end of March 2018.

Name: Name

Member ID#: CFA UK Membership No.

Email Address: Email Address

City: City

Current Role: Current Role

Current Employer: Current Employer

# of Years of Investment Industry Experience: Number of Years of Industry Experience

Field/Specialism (e.g. Buy-side Equity Analyst): Field/Specialism

Other Professional/Academic Qualifications: Other Professional/Academic Qualifications

For the in-person/phone meetings with your mentor, would you prefer to meet:

(mark one): [ ]  Weekdays [ ]  Weekend [ ]  No preference/Either is fine

(mark any that apply): [ ]  Morning [ ]  Mid-day/Lunch [ ]  Afternoon [ ]  Evening

For additional interactions with your mentor, would you prefer to connect:

(mark all that apply): [ ]  As often as needed [ ]  Weekly [ ]  Monthly

Other:

(mark all that apply): [ ]  In-person [ ]  Video-conference [ ]  Telephone [ ]  Email

Please respond to the below questions (max one page; bullet points acceptable):

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| 1. What is your motivation for application to the CFA UK Mentoring Programme?

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| 1. Which specific goals do you aim to achieve through the mentoring partnership? (provide up to three goals, in order of priority)
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| 1. How will the goals you have highlighted above help you to achieve your career objectives in the next 3-5 years?
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Please Below we have identified some common mentoring themes. Please rate the extent to which these are relevant to you and *rank them in order of what you seek in your mentoring experience*:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Themes** |  **1** |  **2** |  **3** |  **4** |  **5** |  ***Preference*** |
|  **(least interest 🡪 most interest)** |  ***(Please rank 1-5)*** |
| I would like to better understand technical concepts |  1 |  2 |  3 |  4 |  5 |        |
| I would like to better understand different jobs and career paths in the investment management industry |  1 |  2 |  3 |  4 |  5 |        |
| I would like to improve my interpersonal, communication, and “soft” skills that will help me succeed in my career |  1 |  2 |  3 |  4 |  5 |        |
| I would like to improve my management skills |  1 |  2 |  3 |  4 |  5 |        |
| I would like to improve my overall understanding of and exposure to a particular field within the investment industry |  1 |  2 |  3 |  4 |  5 |        |
| I would like advice and guidance on navigating workplace politics and conflicts |  1 |  2 |  3 |  4 |  5 |        |

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| --- |
| Please identify your top 3 – 5 professional strengths or areas of expertise that you would like your mentor to have:  |
| 1.      2.      3.      4.      5.       |

|  |
| --- |
| Is there anything else outside of the goals discussed above you would like us to know when we attempt to match you with a mentor? (If yes, please explain,)      |
| Are there any specific companies or roles of a current mentor that you would like to avoid for the mentoring partnership?      |
| Does your current company offer a current mentoring or buddy programme? If so, please explain why the company programme is unsuitable to meet the goals discussed above.      |

**Please read the below, check the acknowledgement and sign and date your application below:**

I acknowledge that if I am matched with a mentor, I am committing to an engagement with the selected mentor lasting from April 2018 until December 2018.

During the course of the mentoring programme, I commit to a minimum of contact with my mentoring partner on a monthly basis, along with an in-person meeting at least four times over the engagement.

I acknowledge that I will be primarily responsible for arranging the logistical details of our meetings and planning the agendas for our meetings.

I acknowledge that while my mentor may provide advice and guidance related to job searches, he/she is not expected to place me in a job or conduct any portion of a job search on my behalf.

I acknowledge that if I am matched with a mentor, I am committing to identifying career goals and to being open to my mentor’s advice and feedback in order to make progress toward my stated goals.

I understand that confidentiality is important in a mentoring relationship and I will work with my mentor to establish our common expectations of confidentiality.

Finally, if at any point the mentoring relationship becomes unproductive or otherwise compromised, I acknowledge that I will attempt to address the issue with my mentor directly first but will notify the program administration if we are unable to resolve the issue.

I consent for CFA UK to hold the data contained in this application form, along with my CV and bio, and to use for matching with a mentoring partner, monitoring and review as applicable, as part of the CFA UK Mentoring Programme 2018.

[ ]  Please check this box to acknowledge the above.

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Thank you for applying to participate as a Mentee in the CFA UK Mentoring Programme 2018.**

Please send this completed form **along with a copy of your current 1-page CV** and a short bio to mentoring@cfauk.org.

Applicants will be notified regarding the status of their application by the end of March 2018.