

Mentor Application

Please submit completed application and your resume to CFACOmentoringprogram@gmail.com by **March 31, 2021**.

To apply, you must be a current member of the CFA Society Colorado.

Name (First, Last): _____

Job Title/Current Position: _____

Company Name: _____ Industry: _____

Preferred Email Address: _____

Daytime Phone (with area code): _____ Evening Phone (with area code): _____

Years in Industry _____

Why do you want to be a mentor?

Describe any past mentoring experience you've had.

What do you envision your mentor relationship being like? What are your goals for this relationship?

What qualities are you looking for in a protégé?

CFA Society Colorado Professional Mentoring Program

What experience and/or qualities do you think you can offer a protégé?

Do you have specific experience within certain industries, asset classes and/or roles or functions? Please list any other skills you have that might be helpful in matching you with a protégé.

Do you have preferences with regard to protégés (such as industry, job experience, gender, personality type, etc.)?

To help manage any potential conflicts of interest on behalf of your employer or other parties, please list any specific or type of organizations of protégés that you prefer to not be paired with. An example could be a mentor who works for an asset manager that maybe paired with a protégé who works for a client (or prospect) of the asset manager.

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Education (University, Degree(s), Graduating year(s)):

Professional Designations (CFA, CPA, CAIA, FRM, CIPM, etc.):

Name and business of current (or most recent) employing entity:

Job Title: _____

Start date and end date of position (if applicable): _____

Please provide a brief job description: _____

Name and business of next most recent employing entity, if applicable:

Job Title: _____

Start date and end date of position: _____

Please provide a brief job description: _____

Information for Setting up Mentoring Sessions*:

Best Day(s) of Week: _____

Best Times(s) of Day: _____

Preferred Locations (parts of town): _____

*Note: Mentors and protégés will set up their own calls/meetings; this information helps to match up those who may be more “geographically proximate,” if possible.