



**CFA Society
Sydney**

Become a CFAS Mentor

Information Pack

February – October 2020

CFA Society Sydney Mentoring Programme 2020

CFA Society Sydney (CFAS) is delighted to announce its annual professional mentoring programme for 2020 run in association with Protégé.

The Mentoring programme is open to both male and female senior executives in the investment industry.

The mentoring programme is a multi-faceted, 6-month long development programme that includes:

- A fully supported and structured mentoring experience
- Matching of Mentors and Mentees along with 1-to-1 mentoring
- A formal launch, mid-point review and closing celebration
- Tailored skills building workshops for both Mentors and Mentees
- Multiple opportunities to network.

CFAS Mentoring Programme Objectives

- Build a deeper and more connected CFAS community
- Develop future leaders
- Facilitate knowledge and experience transfer between the younger and more experienced members of our Society
- Provide skill enhancement opportunities around knowledge sharing.

CFAS Mentoring Programme Summary

- **Official Launch and Closing Celebration**
- **Mentor / Mentee Matching** – a vital component of a successful mentoring programme
- **Mentoring Sessions** – 6 one-to-one mentoring sessions
- **Mentor and Mentee Skills Building Workshops** – various relevant topics
- **Personality Tool** – to understand self and impact on others
- **Mid-point Review** – check progress towards desired outcomes
- **Networking Events** – with Mentees, Mentors, senior executives, partners and other interest groups
- **Programme Workbooks and Materials** – to enhance and support the learning experience.
- **Protégé Mentoring App** – find all mentoring information, workshop schedule, materials in one handy place.

Become a CFAS 2020 Mentor

Mentor roles are open to both female and male executives (non-members can apply) with:

- Approximately **10 or more years'** experience in a **senior leadership role** in the finance industry.
- A desire to guide and motivate the next generation to achieve their career goals and aspirations.
- The business / industry knowledge and experience necessary to be able to discuss a wide range of topics and situations.
- Excellent listening and questioning skills (we will train you).
- Integrity and commitment to confidentiality.
- An open and inquiring mind.
- The availability to participate fully in the programme for 6-months and to join in networking and mentoring events.
- Time to provide, 6 x one-hour mentoring sessions. Dates, times and location to be mutually agreed with your Mentee.

Following are the requirements for becoming a **CFAS Mentee**, which will give you an idea of their current level of work experience.

- **Early career members** with a minimum of **3 and a maximum 7 years'** work experience and currently working.
- A CFA charterholder and a Member of CFA Society Sydney.
- The desire to proactively advance in her/his career and optimise her/his potential.
- A strong commitment to achieving her/his goals, initiatives, and aspirations.
- A willingness to accept feedback and to be honest about her/his positive and challenging attributes.
- An open and inquiring mind and the flexibility to change.
- Manage and drive 6 x one-hour mentoring sessions.

Your Commitment

As a Mentor your time commitment from March to October 2020, will be as follows:

1. Complete the application form by 28 February and participate in the Mentor / Mentee speed matching event on 24 March 2020.
2. Participate in 6 x one-hour mentoring sessions from May to October 2020.
3. Attend the Official Launch, Mid-point Review and Closing Celebration.
4. Actively participate in the Skills Development Workshop and Networking Event.
5. Attend at least 60-70% of all events and workshops.
6. Assist by providing feedback about your experience and of the programme as a whole.

An overview of the **CFAS 2020 Calendar** is outlined on Page 5. We have highlighted the sessions which Mentors should attend, all of which require a commitment of your time.

Application Process

Step 1: APPLICATION FORM

Complete the Application Form via the link below:

NB:

- Use the **latest Internet Browser**
- Avoid Firewalls which may be used by your company or use personal email
- Retain your email address and password to be able to download the Protégé App once you have been confirmed on the programme.

Link: <https://trayka.com/mentor-apply/cfas-sydney-2020-mentoring-programme>

APPLICATION DEADLINE: 11:59 pm, Friday 28 February 2020.

Step 2: ADD DATES TO YOUR CALENDAR

Save the following dates in your calendar:

- Speed Matching – **24 March** - 5:30-8:00pm
- Programme Launch – **5 May** - 5:30-8:00pm.

Step 3: THE PROTÉGÉ MENTORING APP

Once your Application has been accepted, we will send you a link to download the Protégé Mentoring App (use same email and password from Application process) so you can manage event/calendar invites, RSVPs, chat with mentor/mentee, access all programme materials and surveys.

For more information about the CFAS Mentoring Programme 2020 please contact Michaela Francis – michaela.francis@cfas.org.au

CFAS 2020 Mentoring Programme Calendar

Events will be conducted from approximately 5:30-7:30/8:00 pm in the CBD.

| Event | Date | Attendees |
|---|----------------|---|
| Programme Announcement Applications open on-line | February | CFAS |
| Applications Close | 28 February | CFAS |
| Successful applicants confirmed – download Mentoring App. | 15 March | CFAS |
| 'Speed Matching' – pairing Mentors / Mentees | 24 March | Mentors , Mentees, CFAS, Protégé |
| Announce Matched Mentees / Mentors | 4 May | CFAS |
| CFAS 2020 Mentoring Programme Launch | 5 May | Mentors , Mentees, CFAS, Protégé, Guests |
| 6 x 1 hour, 1-to-1 mentoring sessions | May to October | Mentors , Mentees |
| Mentee Skills Development | 26 May | Mentees, Protégé |
| Mentor Skills Development | 16 June | Mentors , Protégé |
| Mid-point Review | 4 August | Mentors , Mentees, CFAS, Protégé |
| Networking Skills | 1 September | Mentors , Mentees, CFAS, Guests |
| CFAS Closing Celebration | 20 October | Mentors , Mentees, CFAS, Protégé, Guests |
| Feedback Survey | October | Mentors , Mentees, CFAS |

What's Being Said ...

YouTube: Check out what a former mentor and mentee have to say about the success they experienced on the programme: <https://www.youtube.com/watch?v=M3AmDByk34c&t=14s>

Mentors

- *'Knowing that I made a positive difference in someone, plus honed my mentoring skills.'*
- *'Excellence in organising and implementing the programme. High quality mentors who are very open.'*
- *'Meaningful experience. Learned about a mentee's situation that was new to me plus supported the community.'*
- *'Improved communication skills, better listening skills and loved the 'making assumptions' workshop.'*
- *'Gained more robust mentoring skills for myself. Built my network of colleagues within the mentoring group plus my network of young talent.'*
- *'This programme goes from strength to strength.'*

Mentees

- *'Good mentoring sessions with my mentor. Useful workshops on relevant topics plus good opportunity to mix with mentees / mentors from different organisations.'*
- *'Gained a different perspective of work/career/life e.g. employee vs employer mentality, having more courage to ask for information and recognition/reward.'*
- *'Defining the image I wanted at work - my branding. Became more confident in my role and better understand my teammates and team dynamics.'*
- *'The programme was a life saver this year at a very pivotal time in my career where I had experienced huge disappointment and was fairly lost at what to do next.'*
- *'I would definitely recommend this programme to my peers.'*
- *'Learned skills they don't teach you at business school.'*

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