



**CFA Society
Sydney**

CFA Society Sydney Mentoring Program

Become a Mentor

August 2020 – April 2021

CFA Society Sydney Mentoring Program 2020

CFA Society Sydney is delighted to announce its annual professional mentoring Program for 2020 run in association with Protégé.

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

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

CFA Society Sydney Mentoring Program 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 skills enhancement opportunities through knowledge sharing.

CFAS Sydney Mentoring Program Summary

- **Official Launch and Closing Celebration**
- **Mentor / Mentee Matching** – a vital component of a successful mentoring Program
- **Mentoring Sessions** – 6 one-to-one mentoring sessions
- **Mentor and Mentee Skills 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
- **Program Workbooks and Materials** – to enhance and support the learning experience
- **Protégé Mentoring App** – find all mentoring information, workshop schedule, and materials in one handy place.

Become a CFA Society Sydney Mentor for 2020

Mentor roles are open to executives (non-members can apply) who have:

- Approximately **10 or more years'** experience in a **senior 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 Program till April 2021 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.

The following are the requirements for becoming a **CFA Society Sydney 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 who are currently working
- A CFA charter-holder 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.

Your Commitment

As a Mentor your time commitment from August 2020 to April 2021, will be as follows:

1. Complete the application form by 25 August 2020 and participate in the Matching Overview event via Zoom on 22 September 2020
2. Participate in 6 x one-hour mentoring sessions between November and April 2021
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 Program as a whole.

An overview of the **Program Calendar** for 2020 is outlined on Page 5.

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 Program

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

APPLICATION DEADLINE: 11:59 pm, 25 August 2020.

Step 2: ADD DATES TO YOUR CALENDAR

Save the following dates in your calendar:

- Matching Overview: **22 September 2020**, 5:30-6:30pm, via Zoom
- Program Launch: **27 October 2020**, 5:30-7:30pm, via Zoom

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 you used for the Application process) so you can manage event/calendar invites, RSVPs, chat with your mentor/mentee, and access all Program materials and surveys.

For more information about the CFA Society Sydney Mentoring Program for 2020 please contact Michaela Francis – michaela.francis@cfas.org.au

CFA Society Sydney 2020 Mentoring Calendar

All sessions will be virtual, conducted via Zoom.

Event	Date	Attendees
2020		
Program Announcement	August	CFA
Applications Close	25 August	CFA
Successful applicants confirmed – download Protégé App.	8 September	CFA
Matching Overview – pairing Mentors / Mentees	22 September 5.30 to 6.30pm	Mentors, Mentees, CFA, Protégé
Matched Mentees / Mentors Announced via App	26 October	CFA
CFA Society Sydney 2020 Program Launch	27 October 5.30 to 7.30pm	Mentors, Mentees, CFA, Protégé, Guests
6 x 1 hour, 1-to-1 mentoring sessions	Nov to April	Mentors, Mentees
Mentor Skills Development	10 November 5.30 to 7.30pm	Mentors, CFA, Protégé
Mentee Skills Development	24 November 5.30 to 7.30pm	Mentees, CFA, Protégé
2021		
Mid-point Review	2 February 5.30 to 7.30pm	Mentors, Mentees, CFA, Protégé
Networking Skills	2 March 5.30 to 7.30pm	Mentors, Mentees, CFA, Protégé
CFA Society Sydney Closing Celebration	23 March 5.30 to 7.30pm	Mentors, Mentees, CFA, Protégé, Guests
Feedback Survey via App	April	Mentors, Mentees

What's Being Said ...

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

Mentors

- *'Knowing that I made a positive difference to someone, plus honed my mentoring skills.'*
- *'Excellence in organising and implementing the program. 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 program 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 now better understand my teammates and team dynamics.'*
- *'The program was a life saver this year at a very pivotal time in my career where I had experienced huge disappointment and was fairly lost about what to do next.'*
- *'I would definitely recommend this program to my peers.'*
- *'Learned skills they don't teach you at business school.'*

Protégé is 100% owned by Differentiate Pte Ltd (200612413N)

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