



Welcome to the AFCPE®
MentorConnect Program

About MentorConnect

At AFCPE, we believe in the value of connection and the importance of relationship building, which is why we are passionate about connecting financial professionals across the continuum of care. We believe that mentorship is foundational to a professional's development and growth.

The MentorConnect program is an informal mentorship program designed to enhance your professional career.

A strong mentoring relationship is built on collaboration and commitment. While the person designated as the mentor may have more experience, skill or knowledge, in a strong mentoring relationship, both mentor and mentee learn from one another.

Why become a Mentor?

For more seasoned professionals, being a Mentor is a great way to pay it forward. We've all had people in our lives who have helped shape our work and our career. The MentorConnect program offers you the opportunity to share skills, resources, and connections – to help others work through issues and challenges, to develop strategic thinking and to foster growth.

Why become a Mentee?

Whether you are looking for guidance as you go through an AFCPE certification program, thinking about making a career change or just want to enhance skills and knowledge to grow in your work, having a mentor provides you with access to new skills, knowledge and the opportunity to expand your network and broaden your professional opportunities.

Getting Started: Easy as 1, 2, 3

STEP 1: Read this entire packet. Understand how the Mentoring relationship works. Are you interested? Move to Step 2.

STEP 2: Complete the [MentorConnect survey](#). This provides the AFCPE member services team with a little more information about you – and tells us if you are seeking a mentor or volunteering to be a mentor (or maybe you want to do both!)

STEP 3: Within 2-4 weeks, an AFCPE staff member will make a warm email introduction between mentor and mentee. At this time, we pass the baton to you to schedule the first meeting and to develop a schedule or connection that works best for each of you.

AFCPE Support:

AFCPE will check in after the first two months to see how the mentoring relationship is going. We'll also offer informal virtual meet up(s) throughout the year, on topics identified by mentoring relationships – providing coaching and guidance where needed.

Additionally, mentors and mentees will receive optional weekly MentorConnect emails, where we will share helpful articles, member spotlights and other tips and tricks to utilize in your work and your career.

Read on, to learn more about our recommendations for building a successful mentoring relationship.

Building a Successful Mentoring Relationship

GUIDELINES FOR MENTORS

Thank you for your interest in becoming a mentor with AFCPE! We are confident that you will find this to be a rewarding experience. Your mentor may be going through an AFCPE certification program, looking to make a career change or just seeking guidance to grow in their work.

What is mentoring? A mentor is someone willing to listen, help provide some direction or ideas, and answer questions. Your mentee sets the agenda and establishes goals, and your job is to help them achieve those goals.

Common Concerns:

I don't have the time: Mentoring does not need to be time-consuming. You can spend as little or as much time as you would like. You will establish up-front with your mentee how much time you have available for a mentor relationship, and they will respect your time.

I'm not an expert: You don't need to be! You have some experience in the area your mentee is interested in, and that is really all that matters at this point. You can provide insights from your journey and challenges that you have faced. In addition, everything doesn't depend on you. You aren't expected to have all the answers, and your mentee knows that. In many cases, your job will be to ask questions which your mentee should then go out and research to find the answers.

I wouldn't know what to say or what advice to give: Mentoring is not simply giving advice. As important as advice is, listening to their interests, desires, passions, and aspirations and asking the right questions to guide their thought process on their career can be just as important.

The mediocre mentor
tells.
The good mentor
explains.
The superior mentor
demonstrates.
The great mentor
inspires.

adapted from
William Arthur Ward

5 Tips for Mentors

1. **Be fully present:** When meeting with or talking to your mentee, devote your full attention to them. If you are too busy to take a phone call or answer questions right then, let them know and find a time when you can be fully present. Being fully present will make the quality of your time more impactful for both of you.
2. **Take time to get to know your mentee:** Be willing to share your struggles, your passions, your dreams and why you do what you do. Then ask questions to learn these same things about your mentee. Find out why they are interested in this field, what experiences brought them to this point and what they hope to achieve. Seek to get to know them on a personal level as well.

3. **Help your mentee set achievable goals:** One of your primary responsibilities as a mentor is to guide your mentee to set and achieve their goals. Encourage them to set S.M.A.R.T. goals – goals should be specific, measurable, achievable, relevant and time-based. Follow-up with them to hold them accountable, then celebrate with them when they achieve their goals.
4. **Ask open-ended questions:** Open-ended questions will give you a deeper understanding of what your mentee is looking for and why. Questions that begin with “Tell me more about...”, “Give me an example of...” or asking who, what, where, when, and how will help your mentee think more in-depth about their goals.
5. **Follow through on your commitments:** If you make a commitment to your mentee make sure you keep it. You may tell them you will e-mail them a title of a book or offer to review their resume or LinkedIn profile or make other commitments. Make a note of your promise and make it a priority. Be cautious about making commitments – it is better to be realistic and only make commitments you can deliver on. Providing accountability and encouragement is an essential part of the mentorship relationship.

GUIDELINES FOR MENTEES

“If you cannot see where you are going, ask someone who has been there before.”

~ J Loren Norris

Having a mentor can make a big difference in your career. Your mentor is someone who has walked the path that you want to walk and is willing to help guide you. They won't have all the answers, but they are willing to listen, help you set and achieve goals and provide some guidance.

5 Tips for Mentees

1. **Be prepared:** Always be on-time for meetings (whether by phone or in person) and be prepared. Know ahead of time what you would like to focus on during the session. Be ready to give an update from previous meetings and to propose an agenda for this session. Your mentor may appreciate if you e-mail them an agenda ahead of time.
2. **Respect their time:** Your mentor is taking time away from work, family and other responsibilities to mentor you. Mentors are happy to do this, but you need to respect their time. Set up specific days and times you will meet with your mentor and try to save your questions for that session. Your mentor will most likely be open to talking with you at other times but be sure to e-mail them to set up a time for a quick meeting as well.
3. **Share your hopes and dreams with your mentor:** Be willing to open up to your mentor and share your hopes, dreams, fears, ideas, and goals with your mentor. Tell them why you want to be in this field and what you are passionate about. Being open will help your mentor know who you are and how they can best help you.
4. **Ask questions:** Your mentor has experiences, contacts, and ideas that can help you. They will ask you questions, but you should be prepared to ask questions of them as well. While they won't always have

an answer, they will generally help you find the answers.

5. **Follow through on your commitments:** Your mentor should encourage you to set S.M.A.R.T. goals (specific, measurable, achievable, relevant and time-based). As you set goals and deadlines to meet those goals or make any other commitment, be sure you keep that commitment and report back to them. Take good notes during your meetings, then within 24 hours send a follow-up e-mail that thanks them for their time and lists your commitments, their commitments, and agreed-upon deadlines.

Questions about the MentorConnect Program?

Contact our Member Services Team:

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