

BSAS Mentorship Program

Suggested topics for Mentor & Mentee Meetings

Please note that these topics are only guidelines for your meetings. If there are other topics that you discuss over the course of your pairing that you feel would be valuable to others, please share them with us.

Meeting #1 – Introductions/ Establishing a Relationship

- Discuss both of your career and educational backgrounds and progression
- Discuss your goals and expectations in the mentorship program
- Decide on the best form of communication and best timing for scheduling future meetings (i.e. telephone, email)
- Mentors and mentees should identify any areas of confidentiality at their first meeting

Meeting #2 – Career Planning

- Continue your discussion about your mentor's history
- Discuss mentee development plans including challenges and exploration of development opportunities
- Discuss skills necessary to achieve these goals and identify strengths/weaknesses

Meeting #3 – Work/ life balance

- Discuss the challenges in achieving work/life balance
- Create a plan to ensure that you are able to achieve professional success without sacrificing your personal/family life

Meeting#4 – Leadership/Team Work

- Discuss the importance of leadership and teamwork as it relates to success
- What challenges do you each face in being part of a team?
- What traits make a good leader?
- How can you improve your leadership skills?

Meeting#5 – Upcoming Professional Challenges

- Discuss issues faced over the course of this year
- Discuss lessons that you have each learned
- Discuss other topics that you have not previously covered but wish to share with each other

Remember to...

Be professional

Professionalism is an important standard of measure, and most especially in the industry of finance that extols the significance of ethics and integrity. Both the mentor and mentee must exhibit professionalism.

Be Considerate

Keep in mind that *everyone's* time is valuable. Most daily schedules are packed end-to-end with various meetings, phone calls, and other important miscellany. Please be considerate of your mentor or mentee's time if there is a need to cancel an appointment.

Be Prepared

Remember to take a few minutes to gather your thoughts to find a general focus for your call/meeting. This will help maximize the time available to discuss the things that you both most want to address.

The Mentorship Committee thanks you again for your commitment to the program and hopes that both Mentors and Mentees find this program mutually rewarding. We encourage you to contact us with any questions or concerns.