



CFA Society  
Singapore

# 2023 MENTORSHIP PROGRAMME

# MENTEE INFORMATION SLIDES



- Mentoring describes a ***relationship*** in which ***an experienced person provides counsel and advice to a less experienced one.***
- Mentoring takes place within the context of an ***on-going, caring relationship*** between the mentor and the mentee.
- Mentoring typically involves a number of meetings that run over several months to ***establish long term relationships.***
- Mentoring typically ***concerned with longer term career issues, obtaining the right experience and focus on capability building.***
- This ***contrasts with coaching*** which concerns ***shorter term specific work activities and performance.***

# Why CFA Society Singapore's Mentorship Programme?

- **CFA Society Singapore (CFAS)** one of the oldest CFA Societies outside of North America and was founded in **September 1987**.
- With more than **4,200 members** (including associated members), it is one of the **larger** CFA Society in the region.
- Membership profiles range from **veteran industry leaders**, mid-career professionals to **new CFA charterholders** and **CFA candidates**.
- With a **diverse** membership pool, CFA Society Singapore's Mentorship Programme is an avenue to encourage more members to become **involved** with a community of like-minded professionals.

# What is CFA Society Singapore's Mentorship Programme?

- Runs annually over a **10-month** period (from registration and closing).
- Seeks to connect **experienced CFA charterholders** of the society with **junior** and **mid-level professionals** in the financial services and investment industry.
- Aims **to tap into the knowledge** of experienced CFA charterholders to address the career development needs to provide valuable guidance to junior members of the society.
- **Mentors** are CFA charterholders with **at least 10 years** of working experience and possess a passion for supporting and guiding the younger members of the society
- **Mentees** are CFA charterholders or CFA candidates with at least 3 years full-time work experience.

# How does the Mentorship Programme Work?

28 February 2023



Registrations for 2023 Mentorship Programme close.

\* Applications for **Mentee Committee** invited

March - April



- **Pre-matching** of Mentors and Mentees
- **Mentees to reach out** to pre-matched mentors for coffee chats and, thereafter, **to rank their preferred** mentors
- **Post-coffee session matching** of Mentors and Mentees

4 May 2023



**Official Launch** on **4 May** of CFA Society Singapore Mentorship Programme with Training Session

\* New for 2023

# How does the Mentorship Programme Work?

May - October



1 to 1 Mentoring Sessions Begin

May - October



Workshops for Mentors and Mentees

3 August 2023



Mark your calendars for **3 August**: Mid-Term Hotdesking Session

7 November 2023



Mark your calendars for **7 November**: Closing Ceremony

\* New for 2023

# Role of Mentees

- **Take the initiative** to drive the mentoring relationship with your mentor
- **Be responsible** for your own growth and career development
- **Be receptive to feedback and suggestions** and be willing to try new things
- **Challenge yourself** and engage in self-reflection
- **Actively listen** and contribute to conversation
- Understand that your mentor will not have all the answers; be **willing to help look them up**
- Access **resources** to **do your homework**
- Be **reliable** and **committed** to the programme



# 1. Matching Process

## Pre-Matching


- Mentor-mentee algorithmically matched based on industry interest and soft skills match
- Each mentee will be assigned 3-4 mentors to reach out to set up 1-on-1 coffee sessions with the mentors. (It is the responsibility of the mentee to reach out to the mentors.)

## Matching

- Mentor-mentee will be matched based on your indicated rankings after mentees have met their pre-matched mentors via the 1-on-1 sessions.
- Pairs will be matched as best as possible.
- Mentee and mentor informed of the match



# 1. Matching Process



**CFA Society Singapore**

**CFA Society Singapore 2023 Mentorship Programme (Mentor/ Mentee Preferences)**

Please kindly fill in the registration form below and submit your preference(s) for the Mentors/ Mentees that you have met during your 1-on-1 coffee sessions.

**\* 1. Personal Details**

Full Name

Email Address

**\* 2. Are you a Mentor or Mentee?**

Mentor

Mentee

**\* 3. Kindly input the FULL NAME of your preferred Mentors/ Mentees**

*Provide us with the ranking of your Mentor/Mentee choices. You are required to fill in all the boxes of ALL the names of the Mentors/Mentees that you have met during the Speed Dating session.*

*(If you are a Mentor, kindly fill in the names of the Mentees that you have met according to your preference of them being matched to you for the 2023 programme.*

*If you are a Mentee, kindly fill in the names of the Mentors that you have met according to your preference of them being matched to you for the 2023 programme.)*

Preference 1

Preference 2

Preference 3

Preference 4

Preference 5

Thank you for completing the form.

- Sample of preference form **to be submitted by 10 April 2023**

## 2. Setting Up The Mentoring Agreement

By the end of the first meeting, both mentor and mentee should have agreed on a set of mentoring guidelines covering the following areas:

1. Frequency of meeting, ideally once a month, for at least an hour each time for a total of 6 mentoring hours over 6 months;
2. Mode of communications: in-person meeting (recommended), virtual meeting (video call), email conversation, audio call and/or instant messages.
3. Duration of each meeting (ideally 60 to 90 minutes);
4. Clear understanding on what is and should remain confidential;
5. Agree on mentoring objectives/goals;
6. Track the progress of the mentee's objectives and provide constructive feedback;
7. Clear understanding of the scope of mentoring—what is included and what is not; and
8. Understanding that mentee will drive the pace of the mentoring relationship.

## 3. Managing The Mentoring Relationship

- **Role of Mentor**

- Help to achieve the defined objective(s);
- Attend agreed meetings without too much rescheduling;
- Follow through with agreed actions;
- Respect confidentiality;
- Be an active listener/supporter and provide constructive feedback.

- **Role of Mentee**

- Pro-actively drive pace of mentoring relationship;
- Constantly ensure mentoring objectives jointly agreed upon are followed through;
- Be open with sharing to build trust;
- Actively listen and engage, be willing to ask for feedback and follow through on assigned tasks.

# Do's and Don'ts for Mentees

## Do's

- ✓ Take the initiative
- ✓ Be respectful
- ✓ Communicate agenda and goals with mentor prior to meeting
- ✓ Clarify goals and expectations
- ✓ Ask meaningful questions

## Don'ts

- ✗ Be passive and wait for mentor to initiate interaction
- ✗ Be late and disorganized
- ✗ Stay in comfort zone
- ✗ Keep quiet when mentoring relationship is no longer helpful

# Mentee Committee

For 2023, we are seeking volunteers to form a Mentee Committee of 5 mentees.

- The main role of the committee will be to ***propose ideas for training sessions that best reflect the interests of the mentee cohort.***
- It will also be a ***forum to collate feedback on the mentorship programme over the course of the year.***

Anyone interested to volunteer is invited to approach any CFA Society Singapore Mentorship Committee member, or to express an interest directly via email to the CFA Society Singapore at [askmentor@cfasocietysingapore.org](mailto:askmentor@cfasocietysingapore.org).