



Mentee Application

Please fill out the below form and email to Mentor.Program@cfaaustin.org by **Monday, October 12, 2020**.

Note: The Mentoring Program is to explore, discover, and develop personal and professional goals. For additional career tools, please visit the CFA Society of Austin website's Career Tools section.

Applicants Name (Last, First): _____

If applicable, Job Title: _____ Company Name: _____

Preferred Email Address: _____

Daytime Phone (with area code): _____ Evening Phone (with area code): _____

Have you passed level II of the CFA Program and are a member of the CFA Society Austin* (Yes/No): _____

* This is a minimum qualification

Education (University, Degree(s), Graduating year(s)):

Professional Désignation(s) (CFA, CPA, CAIA, FRM, CIPM, etc.):

Name and business of current (or most recent) employing entity:

Job Title: _____

Start date and end date of position (if applicable): _____

Please provide a brief job description: _____

Name and business of next most recent employing entity, if applicable:

Job Title: _____

Start date and end date of position: _____

Please provide a brief job description: _____

Areas of Interest:

Why do you want to participate in this program?

Do you have an industry segment/role preference (ex: institutional sales), or other considerations, concerns or comments?

To help manage any potential conflicts of interest on behalf of your employer or other parties, please list any specific or type of organizations of mentors/mentees that you prefer to not be paired with. An example could be a mentor who works for an asset manager that may be paired with a mentee who works for a client (or prospect) of the asset manager.

Please indicate your preferred CFA Mentorship Kick-Off event location:

Outdoor _____ Virtual _____

If admitted into the program, by signing below I commit to participate fully in the program, get to know my mentor, be open to exploring areas of interest, and maintain a professional demeanor, respect & confidentiality:

Signed: _____ Date: _____