




# MENTORSHIP PROGRAM



## Our mission is to create an environment of inclusion and growth.

The Association of African American Financial Advisors (Quad-A) is excited to launch the second class of our mentorship program. This program was designed to provide opportunities for people of color in financial planning to connect, encourage, and engage one another. Additionally, we hope to promote professional development and career advancement. Our mission is to increase the retention of people of color within the financial planning profession.

## What to Expect

- Monthly emails to help support you on your mentorship journey
- Monthly meetings with mentor/mentee
- Survey at the conclusion of the program

If you have any questions, please contact the mentorship committee at:  
[mentorship@aaafainc.org](mailto:mentorship@aaafainc.org)

**\*You must be a member of Quad-A to participate\***



## Responsibilities

### Mentee

- Schedule monthly meetings with mentor. We encourage video calls, if possible
  - During each phone call or meeting, schedule the next contact.
  - Share topics with your mentor at least one week before the meeting, to give your mentor time to think about topics.
- Be considerate of mentor's time.
- Return phone calls and emails in a timely manner.
- Call or email the mentor if you have questions or need to discuss something.
- Notify your mentor of email address or phone number changes.

### Mentor

- Attend meetings coordinated by the mentee.
- If topics are shared in advance, you are encouraged to think about resources and experiences that can speak to that issue to help mentee.
- Notify your mentee of email address and phone number changes.

## Expectations

Mentors and mentees are expected to commit seven months to the mentor/mentee relationship, from November 2020 to June 2021.

### Mentors expect mentees to be:

- Aware of their own expectations
- Committed to the relationship
- Reliable
- Responsible

### Mentees expect mentors to:

- Serve in supportive and nurturing role, encouraging their mentees professional development and growth.
- Provide to mentee career guidance and explain the different opportunities that are available in financial planning.
- Explain to mentee the overall industry landscape, and the business side of it all.
- Guide and direct conversations.
- Recommend resources.
- Offer "hands-on" involvement.
- Advise on workplace climate.
- Have experience in their field.