



FINANCIAL PLANNING ASSOCIATION OF MINNESOTA

# Mentorship Program PILOT



The goal of the FPA of MN Mentorship Program is to foster an inclusive and equitable financial planning profession by providing guidance, support, and opportunities for professional and career development through one-on-one mentorship relationships. This program aims to bridge existing experience and diversity gaps by creating a mentorship network that supports newcomers to the industry and empowers underrepresented individuals, ensuring they have the necessary tools and resources to thrive in their careers.

Experienced FPA of MN members will be thoughtfully matched with advisors, paraplanners, associates, and aspiring planners as mentors to offer personalized guidance and insights.\*

\* Given the limited space, please be aware that applying does not guarantee your participation in this pilot mentorship program.

## PROGRAM EVENT DATES:

- Tuesday, **June 4** at 1:00 PM – Virtual Kickoff to welcome mentors and mentees, including introductions, an overview of the program, and best practices
- Tuesday, **August 20** at 1:00 PM – Virtual Mentor Networking Event
- Tuesday, **August 27** at 1:00 PM – Virtual Mentee Networking Event
- Tuesday, **October 22–23** Opportunity to meet in-person at the FPA of MN ASCEND Conference
- Tuesday, **November 12** at 4:00 PM – In-person wrap-up and celebration

## Why be a mentor?



Enhance your professional network.



Be exposed to different thoughts and viewpoints.



Take pleasure in helping the next generation of planners.



Help close the planner inequality gap.



Have a better understanding of the challenges and opportunities new planners face.

## Why be a mentee?



Gain valuable advice from an expert in areas such as time management and interpersonal skills.



Help guide you through critical career decision-making.



More focused goals.



Help accelerate your professional development.



Increase your networking opportunities.

### MENTOR QUALIFICATIONS:

- FPA of MN member.
- Ensure your availability to participate in all program events.
- Be willing to commit to meeting with your mentee on a regular basis and to communicate honestly, openly, and non-defensively.
- Have a growth mindset. You will learn as much from your mentee as they will learn from you. It's a two-way relationship.
- Be an accountability partner to help your mentee stay on track.

[APPLY TO BE A MENTOR](#)

### MENTEE QUALIFICATIONS:

- FPA of MN member.
- Student, career changer, self-employed, firm employee.
- Ensure your availability to participate in all program events.
- Be willing to commit to meeting with your mentor on a regular basis and to communicate honestly, openly, and non-defensively.
- Be willing to be coached.

[APPLY TO BE A MENTEE](#)

**The deadline to apply is April 30, 2024.** Mentors and mentees will be selected by the FPA of MN Mentorship Program Task Force. If you have any questions about the program, please contact David Leflar at [careerdevelopment@fpamn.org](mailto:careerdevelopment@fpamn.org).