



Mentor Guidelines

Objective

The goal of the Leadership Pathway mentoring program is to connect members of the industry's next generation (Leadership Pathway mentees) with seasoned professionals of the industry (Leadership Pathway mentors) to further enhance the mentees' knowledge of and insights around the Investment Advisory Solutions Industry and provide them a guide as they embark on this new journey of becoming industry thought leaders. Additionally, the program aims to provide mentors a resource in the next generation with a new, fresh outlook on industry needs and opportunities.

Timeline

It is expected that mentors will actively engage with their mentees for two full years (through December 2024), but it is our hope that you will maintain an ongoing relationship thereafter.

Mentor/Mentee Activities

There is not a mandatory time commitment to devote to the mentee/mentor relationship, however MMI suggests the following activities to make the experience as rewarding as possible for both the mentee and the mentor.

- Pre-scheduled quarterly catch-up calls/video chats
- In-person meetings at MMI's major conferences
- Do you work in the same city? Make time for lunch or coffee!

Topics for Conversation

Make the most out of the mentee/mentor relationship by discussing the following topics.

- Industry news and "hot topics"
- Industry challenges and opportunities
- Career goals and progress toward goals
- Continuing education recommendations
- Leadership experiences and best practices for effective management
- Changes in employer, role, and responsibilities
- Work/life balance

Mentee Responsibilities

- Schedule and initiate the quarterly catch-up calls and in-person meetings
- Maintain confidentiality at all times
- Actively contribute to conversation (e.g., share viewpoints on industry topics, share successes and failures, etc.)
- Offer new, innovative insights on industry challenges
- Serve as a sounding board for ideas
- Accept feedback and coaching
- Take advantage of opportunities presented by the mentor

Mentor Responsibilities

- Adhere to scheduled calls and in-person meetings
- Maintain confidentiality at all times
- Act as a resource for information about the industry
- Help the mentee develop skills and knowledge necessary to reach important career goals
- Serve as a sounding board for ideas
- Offer support, advice, and constructive feedback
- Take advantage of opportunities presented by the mentee