



## MENTEE QUESTIONNAIRE

### Personal Data:

Name \_\_\_\_\_ Primary Telephone \_\_\_\_\_  
Last First MI

Address \_\_\_\_\_

E-mail address \_\_\_\_\_  Male  Female

I hold or am working toward the following designations:

CFP®  CFA®  ChFC  CLU  CPA  Attorney  PFS  
 CTFA  EA  Other \_\_\_\_\_

Describe your current status in the financial planning profession (school, job change details, experience, etc.)

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What do you hope to gain from a mentor?

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List some examples of the questions or concerns that you have about your future in the profession.

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What is your preference on holding mentoring meetings?

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The FPA DFW will match mentors with mentees based on experience, desire and answers listed above. We cannot guarantee a match. By signing below, you agree to hold harmless any party affiliated with this program.

Signature \_\_\_\_\_ Date \_\_\_\_\_