

How To Find a CPA Mentor

As you begin the process of seeking a CPA mentor for your Practical Experience Requirements (PER), there are a few things that can help with your search. When contacting your potential CPA mentor, keep these thoughts in mind:

- ✓ **Be clear on the type of guidance you are requesting.** You are asking your potential CPA mentor to meet with you at least semi-annually to discuss your enabling competency development and to identify any strategies for further development. It's anticipated that less than 15 hours of mentoring will be required. It is important to provide your potential CPA mentor with a link to the [CPA Canada website](#) where the mentors role and responsibilities are outlined.
- ✓ **Request an initial meeting.** Use this meeting to determine if you are a good match. Consider the following after your initial meeting:
 - Does the person have the background you are looking for?
 - Does the person have the time and accessibility to mentor?
 - Does the person have previous mentoring experiences?
 - Does the person appear to be someone that will help you develop your enabling competencies?
- ✓ **Respect their time.** Most people who are asked to be mentors have busy schedules. Be sure to thank the person for considering your request and be understanding if they cannot accept. Remember, each interaction is an opportunity to demonstrate your professionalism.
- ✓ **Write a request.** If your potential CPA mentor is unavailable to meet with you in person or speak with you over the phone, a written request should include the following:
 - Address your potential CPA mentor by name
 - Explain your request
 - Outline the role and responsibilities for the CPA mentor
 - Include the CPA PER website information
 - Acknowledge the person's time and include a "thank you" for their consideration.

Please refer to the **Resources** section of this document for further information.

Please refer to the following examples for assistance with making a mentor request.

EXAMPLE 1

A face-to-face request to someone you know or with whom you work:

Hi Alice,

I've really enjoyed and gained a lot from the conversations we've been having and respect how you have progressed in your career. I have a request. Would you consider being my CPA mentor?

As you are aware, I am currently enrolled in the CPA program and I am working towards completing my Practical Experience Requirements. In order to fulfill these specific requirements, I am expected to have a CPA mentor. I can provide information about the role of the mentor and the enabling competencies I will be developing. **(Let the person know you will provide a link, which outlines this information. Provide the following link [<https://cpacanada.ca/CPAMentorship>].)** In terms of your time, it's anticipated that less than 15 hours of mentoring will be required. We would meet semi-annually to discuss my progress and I would take responsibility for creating the meeting agenda. I will also follow up with any steps or recommendations we discuss.

I know that your schedule is busy, so if you are not able to offer mentoring, I fully understand and thank you for considering my request. If it's possible, would you be able to recommend someone who might be a good CPA mentor?

EXAMPLE 2

A written request to someone you don't know or don't know well:

Hi John,

I am writing to you to see if you would consider being my CPA mentor. I am very interested in your background and the field you work in and would welcome the opportunity to be mentored by you.

I am currently enrolled in the CPA program and I am working towards completing my Practical Experience Requirements. In order to fulfill these specific requirements, I am expected to have a CPA mentor. The following link provides information on the particular competencies I will be developing, as well as the role of the mentor (<https://cpacanada.ca/CPAMentorship>). In terms of your time, it's anticipated that less than 15 hours of mentoring will be required. We would meet semi-annually to discuss my progress. I would create the meeting agenda and follow up with any steps or recommendations we discuss.

I know that your schedule is busy, so if you are not able to offer mentoring, I fully understand and thank you for considering my request. If it's possible, would you be able to recommend someone who might be a good CPA mentor?

If you are interested, would you like to meet to discuss the mentoring process further?

Sincerely,

Your name

EXAMPLE 3

A phone request to someone you don't know or don't know well:

Hi John,

My name is _____ do have 10 minutes? I would like to speak with you about the possibility of receiving mentoring from you. I am very interested in your background and the field you work in and would welcome the opportunity to be mentored by you.

I am currently enrolled in the CPA program and I am working towards completing my Practical Experience Requirements. In order to fulfill these requirements, I am expected to have a CPA mentor. I can send you a link that provides information about the particular competencies I will be developing, as well as the role of the mentor (<https://cpacanada.ca/CPAmentorship>). In terms of your time, it's anticipated that less than 15 hours of mentoring will be required. We would meet semi-annually to discuss my progress. I would create the meeting agenda and follow up with any steps or recommendations we discuss.

I know that your schedule is busy, so if you are not able to offer mentoring, I fully understand and thank you for your time and for considering my request. If it's possible, would you be able to recommend someone who might be a good CPA mentor?

If you are interested, would you like to meet to discuss the mentoring process further?

Quick tips for finding a mentor

- ✓ Start with your workplace
- ✓ If your workplace has a Human Resources department, speak with them
- ✓ Past manager(s)
- ✓ Ask colleagues, friends and family
- ✓ Speak with instructors/faculty who are designated
- ✓ Attend Chapters events and other networking opportunities (i.e., professional development workshops, seminars etc.)
- ✓ Community organizations (i.e., Rotary club, volunteer work etc.)
- ✓ Access your Alumni
- ✓ Speak with your organizations advisors, consultants or auditors
- ✓ Provincial publications
- ✓ LinkedIn and other social media channels

Other resources

- Student Orientation Webinar (within D2L): <https://education.cpacanada.ca/d2l/home>