

Mentorship Learning Plan

This learning plan is designed to aid future CPAs in setting clear goals towards meeting the Practical Experience Requirements as part of the CPA Certification Program.

Technical Competency Goals

Use this to start your development. Be aware that your role could change over time; this is just to help provide guidance.

Core:

Review the CPA Practical Experience Competencies and identify which sub-competencies you will be developing for core.

My Core Sub-Competencies are: ,
and

Depth:

Review the CPA Practical Experience Competencies and identify which sub-competencies you will be developing for depth.

My Depth Competency is:

Breadth:

Review the CPA Practical Experience Competencies and identify which sub-competencies you will be developing for breadth.

My Breadth sub-competencies are:

Progression:

Which competency are you strongest with?

Which competency are you most challenged with?

What opportunity can you utilize that will help develop this competency?

Goal: Within the next 6 months, I will focus on:

I will measure my improvement by:

Enabling Competency Goals

Use this to set some achievable goals for your enabling competency development. Be aware your role could change over time; this is just to help provide guidance.

Professional and Ethical Behaviour

Review the professional and ethical behaviour questions in PERT to get a better understanding of what will be expected of you.

What does Professional and Ethical Behaviour mean to you?

What does Professional and Ethical Behaviour mean to your mentor?

Problem-Solving and Decision Making

Review the problem-solving and decision making questions in PERT to get a better understanding of what will be expected of you.

What is a scenario where you can develop Problem-Solving and Decision Making in your current environment?

Communication

Review the communication questions in PERT to get a better understanding of what will be expected of you.

How do you communicate with others?

What are the pros/cons to your methods?

Self-Management

Review the self-management questions in PERT to get a better understanding of what will be expected of you.

What does Self-Management mean to you?

How does this compare to professional and ethical behaviour?

Teamwork and Leadership

Review the teamwork and leadership questions in PERT to get a better understanding of what will be expected of you (there are two questions you can choose from).

Are there any projects/opportunities you could get involved in to expand your exposure?

What is a leader?

How can you show leadership?

Goal setting

For the next six months, I will focus on improving:

I will measure my improvement by:

What will I need from my supervisor/manager over the upcoming months?

What will I need from my mentor over the upcoming months?