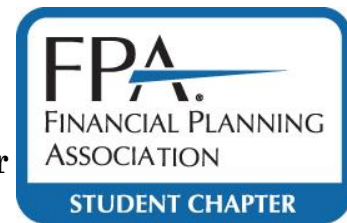


Financial Planning Association of William Paterson University Student Chapter



Summer Mentor Program 2010

Description

The FPAWPU Student Chapter Summer Mentor Program is a 3 month mentorship program where students from the club are matched with professionals in the financial planning industry. The goal of the program is to keep students actively learning and applying financial planning skills throughout the summer and, to use their mentors to help answer sample CFP exam questions, discuss current financial planning issues, and to conduct mock interviews and resume reviews.

Goals of the Team and Program Checklist

- Establish Effective Communication: Whether by phone, email, or in person.
- Schedule convenient times and dates for both members of the team to communicate.

Throughout the Program	June	July	August
○ Hold a Mentor Meeting at least two times a month	CFP Exam Review Question 1	CFP Exam Review Question 2	CFP Exam Review Question 3
○ Schedule one mock interview, either on the phone or in person	Financial Planning Article "Estate Tax 2010"	Financial Planning Article "Health Care Reform"	Financial Planning Article "Baby Boomer Opportunities"
○ Review the student member's resume			
○ Fill out an evaluation form of the summer program	Fill out Monthly Progress Form	Fill out Monthly Progress Form	Fill out Monthly Progress Form

Responsibilities of the Mentor

- Help Students with the monthly CFP Exam Review Question and guide them through the technical aspects of the solution
- Choose an article within the specified monthly topic and tell the student to read the article. After both the student and mentor read the article, discuss why it is pertinent to financial planners.
- Conduct one mock interview (either by phone or in person) with the student to establish their interviewing skills, communicative skills, and both their "weak" and "strong" points.
- Review the student's resume and give the student suggestions on how to better market themselves to a potential financial planning firm

Responsibilities of the Student

- Complete the monthly CFP Exam Review Question and use the professional mentor to review the student's answers
- Read the article chosen by the mentor, and discuss why it may be pertinent to financial planners.
- Prepare for a mock interview with your mentor.
- Send your current resume to the mentor so that it can be reviewed

Review

Monthly Progress	Each member of the team will send a monthly progress form stating what the team accomplished for that month.
Final Review	Both members of the team will fill out a review form at the end of the program to establish the effectiveness of the summer mentor program