

THE BOEHLY CENTER

FOR EXCELLENCE IN FINANCE

Mentor Match Program Student Expectations

Overview:

The Mentor Match Program was created more than a dozen years ago by the Howard J. Busbee Finance Academy to provide a way for their members to be matched with graduated alumni mentors. The Boehly Center has expanded this program to include all students interested in careers in the financial services sector, in order to give current students a mentor in their desired industry. Students can use their mentor as a resource to gain insight into the mentor's industry, company, position, career preparation, or anything else relevant to the mentor's professional experience.

Student Requirements:

1. The program requirement is for one school year (October – May).
2. Matches must have at least two (2) connections each semester (four total per academic year).
3. Students must provide a summary of their initial connections to the Boehly Center via the [connections summary form](#) by December 31, 2022
4. Students are expected to adhere to the program responsibilities & timeline outlined below.

Mentor Match Responsibilities:

Once students have registered, the Boehly Center will inform them if they will be notified of their mentor match, if selected. Communication between the student and mentor should be done through the student's W&M email account.

1. Initial contact: Introduce yourself to your mentor by email between November 14 - 18 (see the guidelines below).

Request a phone/Zoom call and also include an attached PDF copy of your resume.

- a. Resumes must be approved by the Boehly Center before being sent to mentors (once approved, you will receive an email from Boehly.center@mason.wm.edu).

2. Initial phone conversation: Once your mentor responds, coordinate a 30-45 minute phone/Zoom conversation that works well for both you and your mentor. Discuss any of the items outlined below and whatever is most applicable/useful in career preparations for your needs. Topics may include but are not limited to:

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|---|----------------------------------|
| a. mentor's industry, company, specific position, role and responsibilities | e. helpful resources |
| b. a day in the life | f. resume review |
| c. interview preparation tips | g. cover letter review |
| d. career readiness tips | h. behavioral interview practice |
| | i. case interview practice |

3. Required additional communications: After the initial phone/Zoom call, you are required to complete the following two items as a participant of the Mentor Match program.

- a. review your LinkedIn profile with your mentor and discuss recommended adjustments. If you do not have a LinkedIn profile, please create one and share it with your mentor.
- b. complete Cohen Career Center's virtual interview platform: [Big Interview](#) and share the video link with your mentor. Review and discuss opportunities for improvement.

Additional conversations/check-ins with your mentor are also welcomed. As the intended goal is to develop meaningful relationships, we encourage continued communication (as able):

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- Check in with one another to make sure both participants are feeling value from the relationship at least twice a semester.
- Consider updating one another on your professional & personal successes/experiences (competition team victories, articles, awards, marriages, children, etc.).
- Set Google Alerts so you are notified of any new articles or press announcements about your match or interesting programs. Share the articles with one another.
- Share news or articles that are about a common interest.

4. Thank you: Thank the mentor for his/her time after each connection. Be sure to ask any follow up questions. If both mentor and mentee are willing, contact may be maintained beyond the four required connections a year (2 per semester), but it is not a requirement of this program. Please note that the mentor's role is not to interview you for a specific job or to set you up for an interview on the path to being hired, but to serve as a sounding board and coach.

Benefits:

The Mentor Match program is designed to give current undergraduate students a connection to a professional in an industry or company in which they have limited exposure. The program sets itself apart by providing targeted attention to each student. The mentors selected are closely related to a student's career and/or other interests and best understand how to navigate the hiring process and therefore tend to be helpful with interview preparations, resources, and tips. Mentors can also provide perspective on life in the positions students will most likely be holding directly out of college. The mentor's role is not to judge but rather have an open and honest dialogue with their mentees without the pressure that the conversation will impact any future hiring decisions mentors' companies make. Ideally, mentors can be used as a resource to mentees throughout the career search process and help current undergraduates gain a better understanding of finance before they commit to it as a career.

Timeline:

1. Attend the Mentor Match Student Kick-Off Session on Monday, November 14 at 6:30 PM via Zoom. The Boehly Center will provide you a link to join by email.
2. Students will be notified of their mentor match by email by Monday, November 14.
3. Initiate contact with your mentor via email at some point between November 14 – 18. (See ideas for your sample email below.)
4. If you do not receive a response to your initial outreach to your alumni mentor within a week of your first email, make one more attempt. If you still do not hear from your mentor after 2 weeks from the second attempt, email Boehly.center@mason.wm.edu.
5. Summarize initial connections with your mentor via the [connections summary form](#) by December 31, 2022.

Prior to Alumni Outreach:

Be sure to do some research on your mentor and his or her firm before reaching out. Learn about your mentor through their company's website or LinkedIn prior to the meeting/contact. Think about questions you would like answered specific to their role and experience. Think through your goals for the program and what you hope to obtain from the relationship.

Sample outreach email:

When you reach out to your mentor, include the words *W&M Mentor Match* or something similar in the subject line. Using your official William & Mary email account is a must so that the message is less likely to end up in a spam folder. **The sample email below is not a template, just an example; please write in your own personable, yet professional**



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words. Make it informative, but short and to the point. Keep in mind that the mentors are busy professionals. If you plan to send your resume, we recommend sending in **pdf** format, so the layout and spacing remains intact. It is always a good idea to be a little more formal in your initial contact; most mentors will respond and ask you to call them by their first name, but it does not hurt to start with Mr./Ms.

Hi Mentor Name,

I am Jordan Doe, a W&M student, and I have been paired with you as a mentee for the Alumni Mentor Match Program through the Boehly Center this year. Thank you for taking time out of your schedule to participate in the program. I look forward to gaining insight into potential career opportunities in finance and to getting to know more about your career path.

To give you a little background on myself, I am a Finance major with an Accounting concentration, and will also complete a minor in Hispanic Studies. I studied abroad in Seville last year, and will graduate in May 2023. In addition to my academics, I am a member of the Finance Academy, an officer in a Greek organization, and a club swimmer.

I have attached my current resume for your review, and welcome your comments and feedback. Is there a time that could work for you to connect by phone or Zoom in the next few weeks?

Thank you again for your time, and I look forward to getting to know you!

Jordan Doe



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