



CPA

CHARTERED
PROFESSIONAL
ACCOUNTANTS
BRITISH COLUMBIA

Chartered Professional Accountants of British Columbia
800-555 West Hastings Street Vancouver BC CANADA V6B 4N6
T. 604 872.7222 F. 604 681.1523 TF. 1 800 663.2677
www.bccpa.ca

Mentorship Meeting Template for Mentees

Pre-Meeting Checklist:

Complete a semi-annual *Experience Report* documenting your progression and competency development; ensure your *Experience Report* has been verified

Ensure your *Self-Assessed Proficiencies* in the *Technical Competencies* are reasonable

Document any progress you have made in your *Enabling Competencies*

Request a *Mentor Meeting* in PERT and initiate a meeting with your mentor

Prepare an agenda or what you plan to discuss with your mentor; consider some of the [Great Questions to Ask Your Mentor](#)

Meeting Notes:

Meeting Date:

What? (What issue could you use your mentor's assistance with?)

So What? (What alternative options did you explore in addressing this issue?)

Now What? (What new behaviours/next steps/goals have you established? What will you work on?)

Post Meeting Checklist:

Next Meeting Date:

Ensure your mentor has documented their *Mentor Meeting* in PERT

Schedule your next meeting by your *Next Experience Report Date* in PERT

Work on making progress towards your goals; take some notes to share with your mentor for your next meeting