



Mentor-Mentee Agreement

This agreement exists to put your mentoring relationship on a pathway to success. By documenting the details of your mentoring relationship and planning early, you can get down to enjoying the reciprocal and potentially career-changing relationship with your new connection.

Administrative

Frequency of Communication

How often do you commit to communicating? (Weekly, monthly, etc.) _____

Type of Communication

Will you be catching up in-person or virtually? _____

How can you best use Mentorloop to manage communications? _____

Which communications apps do you prefer to use? _____

Recording of Communication

Who is in charge of sharing notes and next steps after each catch-up? _____

Who will update statuses in Mentorloop? _____

Goal Setting & Achievement

Mentee Goals

As the mentee, why did you join this mentoring program and what are the top three things you hope to achieve?

1. _____

2. _____

3. _____

Mentor Goals

As the mentor, why did you opt-in for this mentoring program and what are the top three things you hope to achieve?

- 1. _____
- 2. _____
- 3. _____

Expectation of Achievement

How do you expect to work together to achieve these goals? _____

How will you monitor and share your progress through Mentorloop? _____

Terms and Conditions

We agree that any sensitive issues that we discuss will be held in confidence and will define what fits this definition as our relationship grows, noting where a particular subject matter is sensitive, while reasserting our adherence to the NAIFA Mentor Loop User Agreement at all times.

Mentee

Signature _____

Name _____

Date _____

Mentor

Signature _____

Name _____

Date _____