

How to have a great mentor meeting

Future CPAs are required to meet with their mentor semi-annually. The purpose of this document is to help you get the most out of the mentor meeting.

Mentor meetings are an opportunity to discuss your development with a CPA. Every time you complete an experience report you will be prompted to schedule a mentor meeting. Once the meeting request is in PERT, arrange a time that works well for the both of you.

Mentor meetings can be virtual, and you can have more meetings than the minimum required.

Before the meeting

To prepare for your meeting, ensure your experience reports are up-to-date and complete.

EVR: If you and your CPA mentor do not know each other, or you work for different organizations, it is recommended to have your supervisor verify the report before the meeting.

If this is the first time you are meeting, it is recommended that you prepare a learning plan and take a mentoring agreement with you to the meeting.

Your CPA mentor will be encouraged to view your experience report in preparation to the meeting.

During the meeting

During the meeting it is recommended that you discuss the following items (your CPA mentor will be asked to comment on these after the meeting):

- Your experience report: During the meeting ensure you have access to your experience report so you can both reference it during your discussion (Tip: compare your report against your learning plan to see how you are progressing).
- Your Technical Competencies: Discuss whether your technical competency self-assessment is reasonable.
- Your Enabling Competencies: Discuss your progress in your enabling competency development.
- Your general progression as a future CPA: Any accomplishments or concerns you wish to share?
- Other items: Developmental scenarios, goals, ethical concerns.

After the meeting

If you need to make any changes to the experience report, you can re-open the report to edit it (unless the report you were discussing has already been reviewed).

Your CPA mentor will need to document the meeting in PERT, recording the outcome of the meeting and adding in any additional comments.

Remember: Mentor meetings must be completed on a semi-annual basis. Each missed meeting may result in a one-month penalty.

