

How To Find a CPA Mentor

Before you begin reporting your CPA practical experience, you must have a CPA mentor. The purpose of this document is to assist you with finding a CPA mentor who best suits you. Before you begin, note:

- If you are reporting in the **PPR**, you must be mentored by CPAs from your organization. Your program manager will give you the details of your mentor.
- If you are reporting in the **EVR**, you can be mentored by any CPA member in good standing. You are responsible for finding your own mentor.

To begin your search, you should reach out to:

- The Human Resources department at your workplace
- Your organization's advisors, consultants, or auditors
- Past manager(s)
- Instructors/faculty with CPA designations
- Colleagues, friends, and family

In addition, you should:

- Attend Chapter events (e.g., professional development workshops, seminars, etc.)
- Visit community organizations (e.g., rotary club, volunteer work, etc.)
- Access your Alumni resources
- Search LinkedIn and other social media channels
- Review provincial publications

When contacting a potential CPA mentor, keep the following in mind:

- Be clear on the type of guidance you are requesting. You are asking them to meet with you at least semi-annually to discuss your enabling competency development and to identify any strategies for further development. Provide them with the link to the [CPA Canada website](#) where role and responsibilities of CPA mentors are outlined.
- Arrange a meeting to get acquainted. Use this meeting to determine if you are a good match. Consider the following:
 - Do they have the background you are looking for?
 - Do they have the time and accessibility to mentor?
 - Do they have previous mentoring experiences?

- Respect their time. Most people who are asked to be mentors have busy schedules. Be sure to thank them for considering your request and be understanding if they cannot accept. Remember, each interaction is an opportunity to demonstrate your professionalism.
- Write a request. If a potential CPA mentor is unavailable to meet with you in person or speak with you over the phone, a written request should include the following:
 - Address them by name
 - Explain your request
 - Outline the role and responsibilities for a CPA mentor
 - Include links to practical experience information
 - Acknowledge the person’s time and include a “thank you” for their consideration.

Here are some examples of mentorship requests:

Example 1: A face-to-face request to someone you know:

Hi Alice,

I've really enjoyed and gained a lot from the conversations we've been having and respect how you have progressed in your career. I have a request. Would you consider being my CPA mentor?

As you are aware, I am currently enrolled in the CPA program and I am working towards completing my Practical Experience Requirements. In order to fulfill these specific requirements, I am expected to have a CPA mentor.

I can provide information about the role of the mentor and the enabling competencies I will be developing. (Let the person know you will provide a link, which outlines this information. Provide the following link [<https://cpacanada.ca/CPAmentorship>].) In terms of your time, it's anticipated that less than 15 hours of mentoring will be required. We would meet semi-annually to discuss my progress and I would take responsibility for creating the meeting agenda. I will also follow up with any steps or recommendations we discuss.

I know that your schedule is busy, so if you are not able to offer mentoring, I fully understand and thank you for considering my request. If it's possible, would you be able to recommend someone who might be a good CPA mentor?

Example 2: A written request to someone you do not know well:

Hi John,

I am writing to you to see if you would consider being my CPA mentor. I am very interested in your background and the field you work in and would welcome the opportunity to be mentored by you.

I am currently enrolled in the CPA program and I am working towards completing my Practical Experience Requirements. In order to fulfill these specific requirements, I am expected to have a CPA mentor. The following link provides information on the particular competencies I will be developing, as well as the role of the mentor (<https://cpacanada.ca/CPAmentorship>). In terms of your time, it's anticipated that less than 15 hours of mentoring will be required. We would meet semi-annually to discuss my progress. I would create the meeting agenda and follow up with any steps or recommendations we discuss.

I know that your schedule is busy, so if you are not able to offer mentoring, I fully understand and thank you for considering my request. If it's possible, would you be able to recommend someone who might be a good CPA mentor?

If you are interested, would you like to meet to discuss the mentoring process further?

Sincerely,

Your name

Example 3: A phone request to someone you do not know well:

Hi Mark,

My name is _____. Do have 10 minutes? I would like to speak with you about the possibility of receiving mentoring from you. I am very interested in your background and the field you work in and would welcome the opportunity to be mentored by you.

I am currently enrolled in the CPA program and I am working towards completing my Practical Experience Requirements. In order to fulfill these requirements, I am expected to have a CPA mentor. I can send you a link that provides information about the particular competencies I will be developing,

as well as the role of the mentor (<https://cpacanada.ca/CPAmentorship>). In terms of your time, it's anticipated that less than 15 hours of mentoring will be required. We would meet semi-annually to discuss my progress. I would create the meeting agenda and follow up with any steps or recommendations we discuss.

I know that your schedule is busy, so if you are not able to offer mentoring, I fully understand and thank you for your time and for considering my request. If it's possible, would you be able to recommend someone who might be a good CPA mentor?

If you are interested, would you like to meet to discuss the mentoring process further?