EPC GUIDESTAR

for mentors

AT THE OUTSET: ESTABLISHING EXPECTATIONS

COMMUNICATE. With Mentee, establish a mutual commitment regarding how often you wish to communicate and the preferred method (i.e. meet virtually or in person 3 times a year; email or phone call as needed; touch base quarterly)

SET PRIORITIES. Ask what the Mentee hopes to learn/gain from this relationship, ask for top 3 priorities/goals.

CONFIDENTIALITY. Make sure your Mentee understands this is a confidential relationship. One of the benefits of a Mentee/Mentor relationship is the ability to discuss current job situations and future job prospects. Topics or situations discussed should not be shared unless confirmed first with the other party.

GENERAL GUIDELINES

LISTEN AND ENCOURAGE. Ask open questions, do not try to solve problems - be a sounding board and a source to other resources. Provide constructive criticism/insight when needed/appropriate and be willing to accept similar feedback. This should be a mutually positive and respectful environment in which to grow and learn from one another.

FUTURE PLANS. Ask your Mentee where they see themselves in 5, 10, and 20 years, retirement… Do they have a plan to get there? What is most important to them? How do they define success? What would be their dream job/career? What do they enjoy most about their current position? What is the most challenging aspect of their current situation/profession?

INTRODUCTIONS. Introduce your Mentee to your associates, colleagues, and other EPC professionals especially when attending EPC events. If possible, introduce the Mentee to at least one other Mentor type person with their same skill set/professional path so they might compare notes.

SHARE. Provide Mentee with a list of at least 3 organizations or groups they should/could consider joining or become a part of to become more connected to the planning community.

BE FLEXIBLE. Everyone is busy so try to set your meetings or calls in advance and then try your best to stick to your commitment.

Estate Planning Council of Cleveland
2001 Crocker Road, Suite 510, Westlake, OH 44145
admin@epccleveland.org, 216-696-1228