

# CFP BOARD

## MENTOR PROGRAM

I signed up for the [CFP Board Mentor Program](#) because I was entering my senior year of college and wanted guidance as I entered the financial planning field. Originally, I thought I would speak to my mentor over the phone once or twice; they would answer my questions and we would both move on.



I was wrong! My first phone call with Kevin, my mentor, lasted over an hour. He answered every question I had about the industry while giving me valuable advice as I searched for a firm to work for after graduation. After that first call, we tried to touch base at least once a month. As I applied to different firms and had interviews, Kevin was there to explain to me what the titles of positions typically meant and which ones I should steer away from. He knew my passions and helped me see which role would fit me best.

The best advice Kevin gave me as I entered this field was to be patient and to enjoy my journey. Much of the knowledge that we learn as college students doesn't stick with us because we have not applied it to real life, so don't expect to know it all in the beginning. Both life experiences and clients' trust come with time.

Even though I have made final commitments to a firm and all of my questions have been answered, Kevin and I still stay in touch and I foresee our mentorship continuing on into the future as I prepare to sit for an upcoming CFP® exam. In the next five years, I know I will be helping clients achieve their financial goals—and my mentorship with Kevin has helped me see how I can get there!

There are so many CFP® professional mentors wanting and waiting to share their knowledge with you. It's not a hard process, and it doesn't take that much time. So what are you waiting for? [Sign up and start your mentorship today!](#)

### **LINSEY WINKLER**

CANDIDATE FOR CFP® CERTIFICATION AND CFP BOARD MENTEE

The CFP Board Mentor Program connects aspiring candidates for CFP® certification with CFP® professional mentors who can share their knowledge and experience, and help you on your path to certification.

[CFP.net/mentor  
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