

The Importance of the Pairing Process

A key feature of the program is its carefully designed pairing process. WIFS Leadership plays a critical role in ensuring that each mentor and mentee is paired thoughtfully to maximize the potential for success. By aligning mentors and mentees based on professional goals, experiences, and personal dynamics, the program fosters more impactful and fulfilling relationships.

One of the tools used in the pairing process is the Myers-Briggs Type Indicator (MBTI). This personality assessment helps leadership understand the communication styles, preferences, and work tendencies of each participant. By considering these factors, the program ensures that each pair is not only compatible in terms of professional goals but also in how they interact and collaborate, leading to stronger, more productive mentorships.

Ultimately, the pairing process is designed to create a dynamic that encourages open dialogue, trust, and mutual respect, which are essential for a successful mentoring relationship. Through thoughtful matching, the program helps ensure that each participant—mentor and mentee alike—can reach their fullest potential.

PROGRAM SPECIFICS

At the start of the program, we will invite you to attend a welcome webinar hosted by the Program Director, where you'll be welcomed into the program and receive important information about the upcoming session. We currently offer two sessions for mentorship per year:

- Power Start Session (January – May)
- Finish Strong Session (June - November)

Over the course of six months, mentors and mentees collaborate through video calls, emails and monthly group chats, with mentors supporting mentees to achieve their personal and professional goals. We know that everyone works differently, so in their pairs, the mentors and mentees decide precisely when to meet and for how long. We only specify that participants meet at least two times per month.

Our team will guide you every step of the way, offering dedicated support to ensure that pairs get the most out of your relationships and the platform. We'll monitor progress and check in with you to see how each mentoring pair is doing. There will be bi-monthly progress reports that each pairing is expected to complete and submit with feedback.

Additionally, each month there will be separate Mentor and Mentee group discussions, led by our Program Director. These discussions will help provide guidance on what meetings should consist of, outlining expectations and assisting in advice on various topics. This time also allows peers to collaborate, share ideas, build networks and support one another.

PARTICIPANT EXPECTATIONS

We welcome mentors from diverse backgrounds and value every prospective mentor's interest. We know potential mentors sometimes worry about time constraints or feel they might not have enough to

offer, but rest assured, the commitment is manageable and flexible, and everyone has something to offer! Guidelines for participants include:

- Monthly Mentor/Mentee meeting (minimum of 2 meetings per month-schedules determined by Mentor/Mentee)
- Participation in bi-monthly progress and end of program surveys
- Adherence to mentorship program guidelines
- Recognition of confidential and/or proprietary information which may be discussed in the course of the mentoring relationship. Individual participants must agree to honor the trust relationship between the mentoring pair and never discuss confidential and/or proprietary information with any outside party.
- Agreement to notify the Program Director of any questions, concerns or doubts between members of the mentoring pair.

ELIGIBILITY

Mentor

- *Professional Experience:* Minimum 3 years in the industry.
- *WIFS Membership:* Must be a current, active member in the WIFS community.
- *Language:* Fluent in English.
- *Commitment:* Able to engage for 6 months. Must be actively participating in the program to join monthly group calls. (Active means you are meeting with frequency with your mentor/mentee)
- *Other:* Individual cannot be both a Mentor and Mentee in the same program session.

Mentee

- *Professional Experience:* n/a
- *WIFS Membership:* Must be a current, active member in the WIFS community.
- *Language:* Fluent in English.
- *Commitment:* Able to engage for 6 months. Must be actively participating in the program to join monthly group calls. (Active means you are meeting with frequency with your mentor/mentee)
- *Other:* Individual cannot be both a Mentor and Mentee in the same program session.

APPLICATION PROCESS

If you meet the selection criteria and are not applying within our application window, we encourage you to fill out the application to express your interest in becoming a participant, and WIFS will reconnect with you at the next opening.

Once applications are gathered we will begin the pairing process and reach out to inform parties timely of next steps.

IN SUMMARY

The Women in Insurance and Financial Services Mentorship Program is an invaluable opportunity for growth, empowerment, and success. Whether you are a seasoned professional seeking to give back or a rising star looking to accelerate your career, this program offers the tools and support needed to thrive. Through thoughtful pairing, a commitment to mutual development, and a focus on building meaningful relationships, the program contributes to creating a more diverse, inclusive, and empowered future for women in the industry.