Listed below are examples of objectives/goals to assist you in developing a plan to achieve success through the mentor-mentee relationship.

**Mentee’s objectives/goals:**
- To develop a leadership role to prepare for future growth.
- To gain a greater awareness of opportunities and activities that can broaden my education.
- To gain a greater awareness of opportunities and activities that can expand my network.
- To learn how to communicate effectively in networking situations.
- To gain a better understanding of best-practices.
- To further develop decision-making skills.
- To increase knowledge in asset allocation.
- To increase efficiencies within my office.
- To create a productive work environment for staff, or work towards hiring staff to create better efficiencies.
- To assess my areas of weakness.
- To effectively manage my time and be more productive.
- To communicate effectively with clients.
- To transition to a fee-based practice and incorporate financial planning.
- To develop a sense of one’s strengths and weaknesses as a leader; planner; advisor; business owner.

**Mentor’s objectives/goals:**
- Assess mentee’s current level of expertise.
- Assess mentee’s current practice and areas of strengths and weaknesses as a leader; planner; advisor; business owner.
- Advise and make recommendations on best practices surrounding mentee’s objectives/goals.
- Provide guidance and support by creating an atmosphere of openness where meaningful communication and trust can exist.
- Assist mentee in identifying objectives/goals.
- Assign mentee specific tasks/assignments aimed to develop skills or accomplish specific objective/goal.

**Steps mentee will take:**
- Provide mentor with performance feedback.
- Accept responsibility for own development and success.
- Determine meeting schedule.
- Share openly experiences, goals, objectives.

**Steps mentor will take:**
- Budget time to be a mentor.
- Listen well.
- Set clear, realistic and definable expectations and goals.