**Duties of a Mentor:**
*The following is a list of ideas for successful mentoring.   Use this “job description” when recruiting members and make it available at your mentor organizational meeting.  Feel free to expand the list with other “best practices” of your own!*

* Mentoring is a commitment.  Your assigned student is counting on you to be a source of information, motivation, caring, celebration of results, as well as encouragement and “course correction” when needed.
* Introduce yourself to your candidate and arrange to meet.  Even if it is someone you know, formalize the mentoring process and let your candidate know how pleased you are that he or she is working toward the CPCU designation and that you are there to help in any way possible.
* Verify that you have your candidate's correct contact information including address, company, email address, and phone number(s).  Advise how/where you can be reached.  Agree on preferred times and methods of contact.
* Discuss with the candidate the parts already completed and those still ahead.  Help the candidate, as needed, to join a classroom or on line class, study group, or to access other appropriate study aids.
* Although a mentor is not expected to provide technical “tutoring,” be able to find this support for your candidate as needed.   Interest group members in your chapters are often ideal sources of technical expertise.
* Invite your candidate to any specially planned function or to one or more chapter meetings during the year. If you can't escort your candidate to the meeting, be sure another chapter member will be there to meet the student and make introductions.
* The main benefit of mentoring is *ongoing* support. Keep in touch with your candidate. Particularly offer encouragement prior to the exams.
* Check with your candidate after exam results are issued (normally student receives an e-mail within several weeks of the exam date).  Offer sincere congratulations for a successful exam. Here’s where a personal note or letter can be extremely motivating!
* If the exam was not passed, it is most important to assist the candidate in overcoming a sense of discouragement.  The Institutes can provide an exam analysis demonstrating the areas of strength and where the student still needs more work.  Go over this report with your candidate and help him/her focus on the weaker points and prepare to take the exam again without delay.  Point out that many CPCUs failed an exam somewhere along the way (perhaps it happened to you).
* If you encounter difficulty, contact your chapter candidate recruitment and development chairman for assistance. Talking to other mentors to share ideas will often solve a problem.
* If your candidate moves out of the area, advise the candidate recruitment and development chairman who can help the candidate get connected to his/her new chapter.
* Make your candidates aware of Candidate Membership in the CPCU Society.  Candidates are eligible to join the Society at 50% dues upon the completion of four parts of the CPCU program.  Studies have shown that the candidates who join the Society as students have more successful completion rates and a shorter time to completion.
***Transition to New Designee***
* As your candidate nears completion, encourage him/her to attend CPCU Society’s Annual Meeting and Seminars as well as the local chapter Conferment.
* Encourage new designees to maintain membership in the CPCU Society and active participation in the chapter.  If you have been bringing your candidate to chapter events or if they have been candidate members, this will be easy. Encourage new designees to sign up for a chapter committee.  This is also a good time to introduce new designees to the Society's Continuing Professional Development program.  Mentoring does not have to stop once your candidate earns the CPCU designation!
* Encourage new designees to become mentors so they can continue to share The CPCU Experience!