

Example:

# INCPAS SCHOLARS MENTOR TOOLKIT

a more detailed version of this toolkit  
is provided to all mentors!



# ABOUT THE INDIANA CPA SOCIETY

The Indiana CPA Society is a statewide professional association representing nearly 6,000 CPAs in the public practice, corporate finance, government and education. INCPAS serves the public as well as its members. The organization functions as an advocate for the profession through education, public awareness, government relations, and promotion of high ethical standards. Programs and services offered by the Society are designed to meet the needs that have been identified for its diverse membership.

## THE INCPAS SCHOLARS PROGRAM

INCPAS Scholar  
Class of 2012



**Jose Hererra**  
Property Accountant  
KPMG

Welcome to the INCPAS Scholars program!

This long standing career awareness and mentoring program will **open the doors to your Scholar's passions and purpose** while providing a year-long exploration into the world of business and accounting.

This isn't just a program; **it's a community**. They'll engage in eye-opening monthly events that unveil the ins and outs of the accounting profession. They'll benefit from having a mentor who will help hone their talents and reach their educational goals.

The best part, this journey doesn't conclude in a year—it extends far beyond. The INCPAS Scholars family isn't just a network; **it's a lifelong connection**. Scholars join over 250 Scholars and have access to former Scholars (like Jose), mentors, scholarships, valuable introductions, and ongoing support.

Make the most of your time at INCPAS Scholars events and with your Scholar. **This program would not be possible without the support of our mentors and sponsoring partners.**



# WHO WE ARE

If you have questions or concerns about the Indiana CPA Society or the INCPAS Scholars Program, please do not hesitate to contact your INCPAS Scholars team.

**Ali**



I'm Ali Tonini, the VP-Pipeline & Outreach at the Indiana CPA Society. I work with students, CPA Candidates, educators...*a lot*. I will be your main point of contact throughout the year. If you have questions about our events, can't connect with your mentor or need help with the program, just reach out!

**How to reach me:**

**Cell:** (317) 607-4358 or (317) 726-5025

**IG:** @incpas\_scholars

**Email:** atonini@incpas.org



**Anyah**

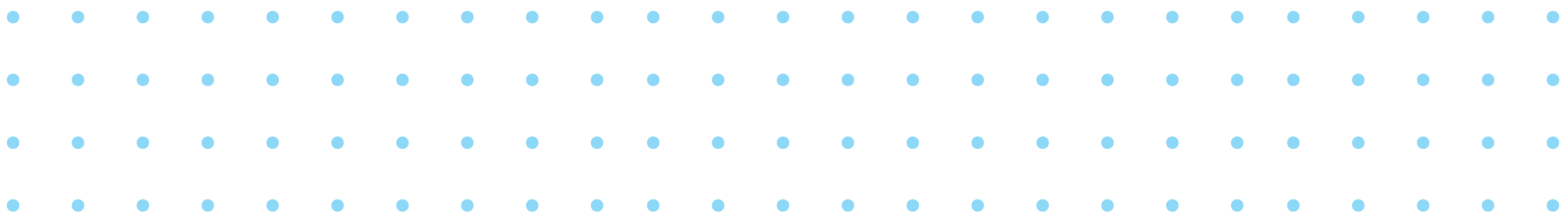


I'm Anyah Cork, the Society's Workforce Development Associate. I work closely with our Scholars and help them throughout the year! Added bonus, I am a former Scholar and know the program well!

**How to reach me:**

**Cell:** (317) 726-5006

**Email:** acork@incpas.org





# FREQUENTLY ASKED QUESTIONS

## 1 What is the expected time commitment?

Mentors are invited to participate in all monthly events. However, you are not required to attend all events. Required events include the welcome dinner and one additional event. In addition to the monthly events, you should plan to have monthly conversations with your Scholar.

## 2 When are the INCPAS Scholars events?

Please see the INCPAS Scholars calendar for specific dates and times. This will not include mentoring session dates, as these will be determined by your Scholar, their family and you.

## 3 If my Scholar needs a ride to an event, can I drive them?

**No!** For liability reasons, **under no circumstance can you drive your INCPAS Scholar to/from an event.** Your Scholar should call Ali Tonini to help arrange alternate transportation.



## 4 Will there be out of pocket costs?

No. The INCPAS Scholars program is funded by our sponsoring partners. However, if you have a mentoring session at a restaurant/coffee shop, you may want to consider covering the expense.

## 5 I travel quite a bit for work, can I still participate?

Of course! Just make sure you're talking to your Scholar each month! Many mentors Facetime with their Scholars while on trips. This is exciting for the Scholars to see the travel benefits of CPAs.



**6****What should I talk with my Scholar about?**

Refer to the calendar of events and discussion guides. You'll find important event details, an overview of the event and a discussion guide to aid in your conversation with your Scholar. Each month you will receive an email (and text if you opt in) providing details for the event.

**7****I am having trouble connecting with my Scholar, what should I do?**

The first month or two of the program can be challenging if you are paired with a Scholar who is shy or quiet. However, stick with it. Use the event discussion guides and review the Scholar communication tips.

Many of the Scholars will be taking a business/accounting class at school. Offering to help with homework or school projects is a great way to connect with your Scholar.

**8****My Scholar is not responding to my texts, calls or emails. What should I do?**

INCPAS needs to know **right away**. Scholars are expected to be in touch with you every month and if they miss a meeting or phone call, we need to know this. Often, when a mentor is having trouble reaching their Scholar they simply got a new phone number.

**9****Should I follow my Scholar on social media and is it appropriate to let them follow me?**

This is entirely up to you. Some mentors have found this as an effective way to communicate with their Scholar and keep track of how they are doing. Consider setting up a privacy setting for the Scholar if there are photos that you would not want them to see.

**10****Who is the INCPAS Scholars transportation provider?**

Carey International will transport the students to INCPAS Scholars events. You are welcome to ride on the bus or meet us at our event locations.

**11 What is the suggested attire for the events?**

Before each event, look at your calendar of events for guidance on suggested attire. The dress will range from casual to business casual. On business casual days, it's a good idea to give your Scholar examples of what they could wear.

**12 I don't think I'll be available for a presentation during CPA Week, what should I do?**

This is understandable. Occasionally, a mentor is traveling and is not available or the thought of giving a presentation is stressful. This is okay. We work directly with the school to schedule presentations and will find another CPA to volunteer.

**13 How is the INCPAS Scholars program funded?**

The sponsoring firms, companies, colleges and universities have made a significant investment in the Society's pipeline and DEI initiatives. Mentoring is one part of that commitment. As a mentor you will have a profound impact on the college and career decisions of your Scholar!

## Did you Know?!



**Commitment Matters:** We realize work and life can get hectic, but it's critical you commit to this experience and communicate with your Scholar each month.

**Discussion Guides:** As you prepare to talk with your Scholar each month, review the Calendar of Events and Discussion Guides. These guides will provide suggested talking points for your monthly conversation. You are not required to cover each point, but try and help them prepare for our next event.

**Stay in the Loop:** Read the emails for event details, including RSVP links, event locations and suggested attire. Mentors can opt-in for text reminders.

**Attendance Counts:** Help your Scholar meet their attendance goal. They are required to attend 80% of scheduled events to earn a \$500 academic gift at the end of the program.

*Your engagement and enthusiasm  
will shape your experience!*



# RESPONSIBILITIES



INCPAS Scholars have the unique opportunity to get an up-close, real world, glimpse at the CPA profession! A significant investment has been made to support our Scholars in this program and upon successful completion of the program, they will earn an academic gift of \$500.

The INCPAS Scholars Program **requires a yearlong commitment**. Each month, Scholars will be expected to attend and actively participate in various events. While it's understandable that a Scholar might need to skip an event or two, they must attend at least 80 percent of the events. Mentors are invited to attend all events, however attendance at two events is mandatory.

Review your responsibilities below:



1

Attend at **least 2** of the scheduled INCPAS Scholars events.

2

Send at least **one e-mail & two texts** to your Scholar each month.

3

**Respond** to your Scholar's emails, phone calls and texts.

4

**Have a conversation** with your Scholar at least once a month.

5

**Meet with your Scholar** for coffee/lunch at least once each semester.

6

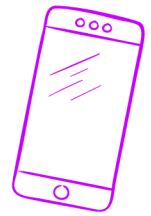
**Be a member** of the Indiana CPA Society

7

Let INCPAS Staff know if you are having a difficult time **connecting with your Scholar**.

8

**Have fun and know that you are making a difference!**



# COMMUNICATION

Communication is essential to the success of this program! The Society will communicate with Scholars and mentors through email, texts, phone calls and via social media. As a mentor, **you need to initiate conversation with your Scholar each month.** If you have trouble getting in contact with your Scholar tell Society staff immediately. Do not wait for a few weeks/months to inform Society staff. Do not worry about "getting your Scholars in trouble."

## WAYS TO COMMUNICATE



### Texting

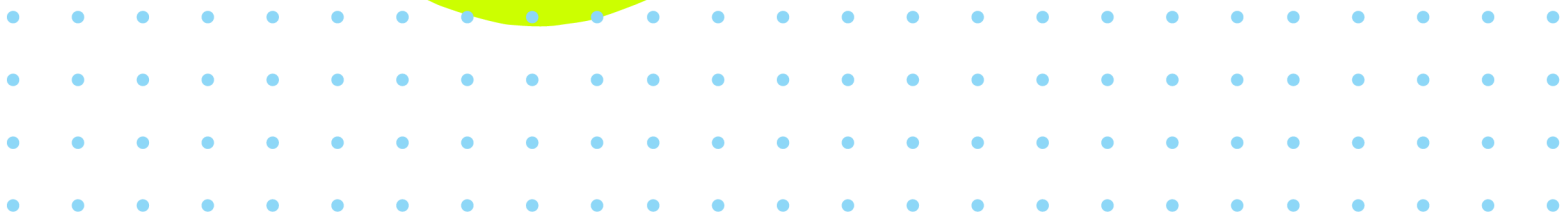
Each month Scholars will receive a text with event details (date, time, location, etc.). They will also be able to RSVP for events via text message. Mentors can opt-in for text reminders.

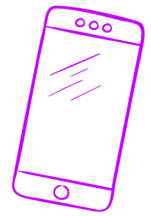
### E-mail

Prior to our events, you will receive a detailed email with a summary of the monthly event. You will also be able to RSVP for events via these emails.

### Instagram

You'll find timely and informative information on Instagram. Make sure to follow @incpas\_scholars & @incpasstudents.





# YOUR SCHOLAR

As a mentor, you are an invaluable resource for your Scholar. Your role is pivotal in guiding and supporting them through their journey. It's essential to foster open communication and be responsive. Recognize that initiating conversations with a high school student can sometimes feel daunting and lead to moments of awkwardness. However, rest assured that with the following tips, you can navigate these initial interactions with confidence and ease.

Multi-year  
mentor &  
Scholar  
speaker



Zenai Savage, CPA

## HOW TO GUIDE:

for chatting with your Scholar!

**Introductions:** A great place to start when you first meet your Scholar is to talk about yourself and ask questions to your Scholar.

**Career Path:** Everyone has a story. Tell your Scholar about how you became a CPA (college, internships, jobs, etc.).

**Goals:** Establishing goals is critical. Help your Scholar by completing a goal setting exercise.

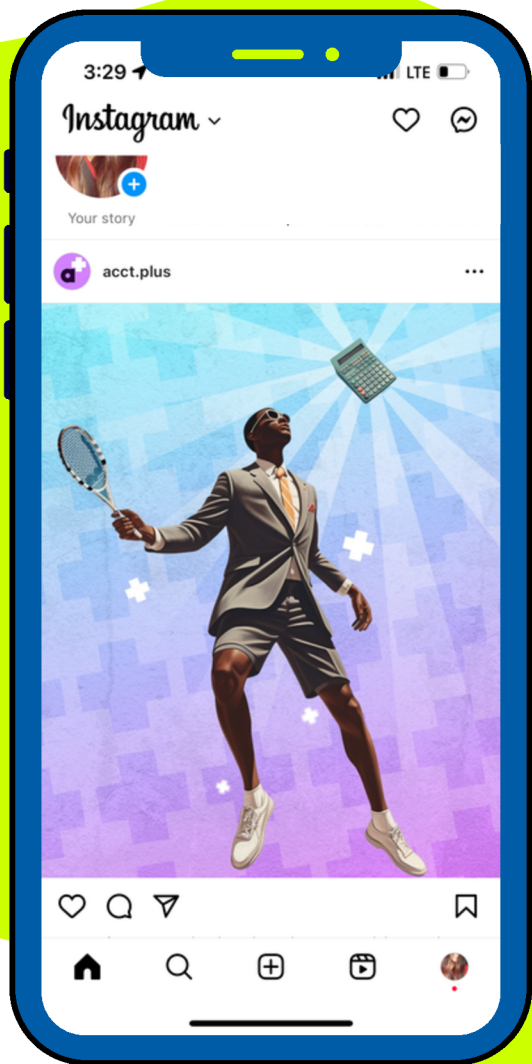
**Fun Stuff:** When all else fails and you just aren't sure what to ask, **go for the fun stuff**, sports, movies, food...

Have you watched anything good on Netflix lately?



# WANT TO LEARN MORE?

The Indiana CPA Society and the Indiana CPA Educational Foundation partnered with the Center for Audit Quality to support Accounting+. Accounting+ helps students discover the vast opportunities in the accounting field.



## ACCOUNTING+

 [joinaccountingplus.com](https://joinaccountingplus.com)

 [accounting.plus](https://accounting.plus)

 [acct.plus](https://acct.plus)

**Education:** What does going to school for accounting look like? Is it hard? Is it all math (no!!). See what it's like for accounting students and find scholarships!

**Lifestyle:** Travel the world as an accountant? It's true, there are countless travel opportunities for accountants. No matter the kind of work you're passionate about or the industry you want to work in, you can find a job that helps you see the world.

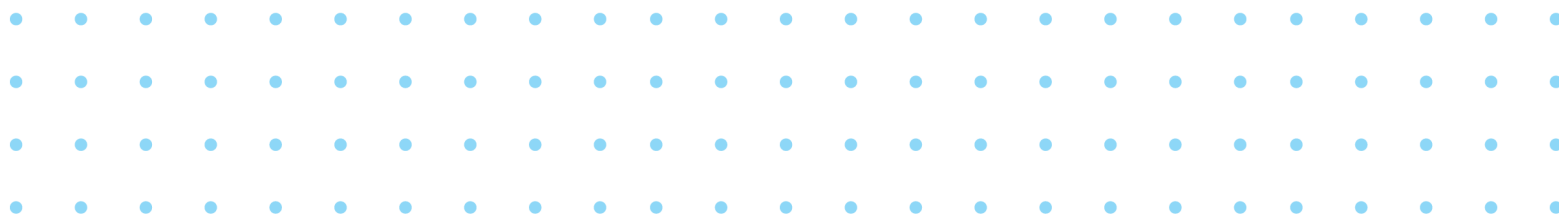
**Career:** There are many ways to be an accountant. You can own your own business, support your local community, or work in any industry that matches your passion. And because there are so many different ways to be an accountant, you can count on every day being different.





# CALENDAR OF EVENTS & DISCUSSION GUIDES

all the info & details you'll need for  
successful monthly conversations







# VISIT TO PURDUE

**OCTOBER**

**Event:** Visit to Purdue

**Date:** Oct. XX from 8 a.m.-4 p.m.

**Drop-off/Pick-up:** Indiana CPA Society

**Suggested Attire:** Business Casual

The Visit to Purdue is always a Scholar favorite. This is an exciting opportunity for you to guide and support your Scholar as they explore the world of accounting and higher education. During this event, Scholars will visit Purdue University and engage with the Business Opportunity Program (BOP) students and faculty.

They'll have the chance to connect with college accounting students, accounting faculty, and admissions officers. The day includes a campus tour, participation in an lecture, and lunch on campus. Your role as a mentor is crucial in helping them navigate this campus experience.

## Discussion Guide:



**Anticipation:** Talk to your Scholar about their expectations and excitement for the visit to Purdue. Encourage them to ask questions about college life, accounting programs, and campus activities. Talk about your college experiences!

**Networking:** Emphasize the value of networking and making connections during their visit. Discuss the benefits of interacting with college accounting students, faculty, and admissions officers.

**Campus Exploration:** Discuss the significance of the campus tour. Encourage them to take note of key facilities and resources that could aid their academic journey.

**Classroom Experience:** Help them prepare for sitting in a lecture. Discuss the importance of active listening and engaging in the discussion.

**Lunch and Informal Chats:** Highlight the opportunities that casual interactions during lunch can offer. Encourage them to strike up conversations with their peers, as well as college students, to gain insights into university life.



# COLLEGE NIGHT

**NOVEMBER**

**Event:** College Night

**Date:** Nov. XX from 6-8:30 p.m.

**Drop-off/Pick-up:** Indiana CPA Society

**Suggested Attire:** School Clothes

College Night is a unique opportunity for you to help your Scholar and their family as they explore the transition to college and (hopefully) the exciting world of accounting.

During this event, Scholars and their families will hear from representatives from financial aid, admissions, accounting faculty, and current accounting students. The goal is to provide valuable insights into the college journey and answer any questions they may have.

## Discussion Guide:



**Family Participation:** Encourage your Scholar to invite their family to attend College Night. Scholars and parents will be in groups and have the opportunity to ask questions to each expert in a small group environment.

**Engagement:** Discuss the importance of thinking about questions in advance and coming to the event with their list of questions for each expert.

**Financial Planning:** Emphasize the significance of the financial aid session. Urge them to inquire about scholarships, grants, and financial planning strategies to ensure a smooth transition to college.

**Admissions Insights:** Discuss the value of hearing from admissions representatives. Encourage them to learn about application processes, deadlines, and requirements to maximize their chances of acceptance.

**Faculty Interactions:** Highlight the opportunity to connect with accounting faculty members. Brainstorm a few questions they could ask the accounting faculty (examples: questions about the curriculum, resources, and faculty support available to accounting students).

**Student Perspectives:** Discuss the importance of listening to current accounting students. Encourage them to ask about student life, extracurricular activities, and how to make the most of their college experience.



# HOLIDAY PARTY

**DECEMBER**

**Event:** Holiday Party

**Date:** Dec. XX from 6-8:30 p.m.

**Drop-off/Pick-up:** Indiana CPA Society

**Suggested Attire:** Festive Attire

The INCPAS Scholars 3-Month Check-In is upon us, offering an opportunity to reconnect and reflect on the journey so far. As we gear up for the festive Holiday Party, your role becomes even more crucial in guiding and supporting your Scholar.

This event is a chance for both Scholars and mentors to unwind, play games, enjoy delicious food, and create lasting memories.

## Discussion Guide:



**Holiday Party Fun:** Discuss their expectations about the Holiday Party and ask about their favorite games. In the RSVP, Scholars and mentors can suggest new games for the group to play.

**Teamwork and Collaboration:** The majority of the games we play at the Holiday Party are team-based. Ask about their experiences working in groups and how they contributed to their team's success.

**Building Relationships:** Talk about their interactions with the people they've met in the program. Encourage them to stay connected to the people who had an impact on them.

**Progress Check:** This is a great time to explore their progress in the program so far. Have they achieved any academic or personal milestones since the start?

**Future Anticipation:** Encourage them to look forward to the upcoming months. Discuss their expectations and goals for the next phase of the program.

*Your ongoing support and engagement are instrumental in your Scholars journey.*



# MEET THE PROFESSION

## JANUARY

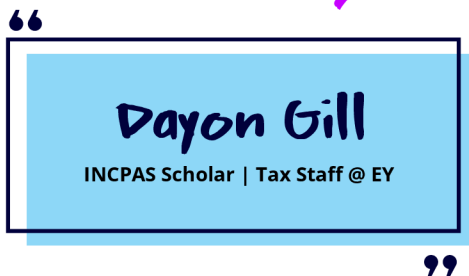
**Event:** Meet the Profession Night

**Date:** Jan. XX from 5:30-8 p.m.

**Drop-off/Pick-up:** Indiana CPA Society

**Suggested Attire:** School Clothes

In January, INCPAS Scholars are invited to attend Meet the Profession Night. This networking event connects high school and college students with Indiana firms and companies in a relaxed setting. Come ready to talk and get your questions answered.



## Discussion Guide:

**Small Talk:** The majority of the Scholars time will be spent talking with firm and company representatives. Help them develop a good introduction that they can use when they go up to each table.

You can also help them come up with a few questions they can be prepared to ask.



# OFFICE VISIT #1

**FEBRUARY**

**Event:** Office Visit #1

**Date:** Feb. XX from 8 a.m.-4 p.m.

**Drop-off/Pick-up:** Indiana CPA Society

**Suggested Attire:** Business Casual

It's time to gear up for an exciting day of exploration at our first Office Visit experience. This unique event is a stepping stone for Scholars to experience the CPA profession first hand. They'll spend the day at businesses that employ CPAs, where they'll have the chance to meet with CPAs holding various positions and levels within the organization.

This is a fantastic opportunity for them to gain insights, ask questions, and expand their horizons. Since this is their first office visit, let's ensure they're well-prepared for this enriching experience.

## Discussion Guide:



**Professional Attire:** Discuss the importance of dressing appropriately for a business environment. Remind your Scholar that they should dress in business casual attire. This is a great time to talk about do's and don'ts of professional dress.

**Engagement and Respect:** Highlight the significance of being engaged and respectful during their interactions. Encourage them to actively listen, ask thoughtful questions, and show appreciation for the CPAs' time.

**Research:** Encourage them to research the organizations we are visiting. Discuss how having a basic understanding about the organization and their business can help them make the most of their visit.

**Networking Skills:** Share tips on effective networking. Discuss the value of exchanging contact information and actually following-up with the people they meet.

**Asking Questions:** Discuss the importance of asking questions. Encourage them to inquire about the CPAs' roles, responsibilities, and their journey in the accounting profession.



# VISIT TO IU

**MARCH**

**Event:** Visit to IU

**Date:** March XX from 8 a.m.-4 p.m.

**Drop-off/Pick-up:** Indiana CPA Society

**Suggested Attire:** School Clothes

Our second campus tour is at the Kelley School of Business at Indiana University. This event is a prime opportunity for Scholars to tour another university. The goal of INCPAS Scholars campus tours is not to pressure them to attend our host university, it's to help them envision themselves in (any) college experience.

After gathering at INCPAS, Scholars will make their way to Bloomington. There, they'll connect with college accounting students and engage with accounting faculty. They'll also have the chance to meet former INCPAS Scholars who attend IU.

## Discussion Guide:



**Anticipation:** Talk to your Scholar about their expectations and excitement for the visit to IU. Use this opportunity to help your Scholar come up with a list of questions they'll want to ask while they're on campus. Remember, even though they've already been on a campus tour, they should come prepared with questions.

**Networking:** Emphasize the value of networking and making connections during their visit. Discuss the benefits of interacting with college accounting students, faculty, and admissions officers.

**Campus Exploration:** Discuss the significance of the campus tour. Encourage them to take note of key facilities and resources that could aid their academic journey.

**Classroom Experience:** Help them prepare for sitting in a lecture. Discuss the importance of active listening and engaging in the discussion.

**Lunch and Informal Chats:** Highlight the opportunities that casual interactions during lunch can offer. Encourage them to strike up conversations with their peers, as well as college students, to gain insights into university life.





# WALK & TALK

**APRIL**

**Event:** Indiana Avenue Walk & Talk

**Date:** April XX from 5:30-7:30 p.m.

**Drop-off/Pick-up:** Indianapolis Urban League

**Suggested Attire:** School Clothes

Make sure to save the date for our April event, a Indiana Avenue Walk & Talk. This event invites Scholars, mentors (your friends), and program sponsors to join INCPAS for a dynamic Walk & Talk with Sampson Levingston.

Starting and ending at the Indianapolis Urban League, this 2-mile historical journey is set to last around 2-hours. It's a fantastic chance to connect with the organizations that play a crucial role in supporting the INCPAS Scholars program and the CPA profession's talent pipeline.

## Discussion Guide:

**Networking Moments:** Discuss the networking opportunities during the Walk & Talk. Encourage your Scholar to think about questions they'd like to ask Sampson Levingston about Indiana history.

**Organization Awareness:** Encourage them to reflect on the significance of connecting with organizations supporting the INCPAS Scholars program. This would be a great opportunity to share your organization's commitment to diversity, equity and inclusion and why this is important.

 [through2eyes.com](https://through2eyes.com)

*Sampson,  
our tour  
guide*







# CPA WEEK: PRESENTATION

**MAY**

**Event:** CPA Week: Classroom Visits

**Date:** May X-X (INCPAS will schedule)

**Drop-off/Pick-up:** None, this is at school

**Suggested Attire:** School Clothes

This event is a fantastic opportunity for you share insights about the accounting with Indiana high school students. As part of CPA Week, you'll visit your Scholar's school and present to an accounting, business or careers class. This collaborative effort is a chance to inspire and educate the next generation of accountants.

INCPAS will provide slides, talking points and work with the school to ensure a seamless presentation. The final section of the presentation will promote the INCPAS Scholars program and encourage students to apply for the program.

If you are not available to participate due to scheduling conflicts, we understand.





# OFFICE VISIT #2

**JUNE**

**Event:** Office Visit #2

**Date:** June XX from 9 a.m.-4 p.m.

**Drop-off/Pick-up:** Indiana CPA Society

**Suggested Attire:** Business Casual

For many INCPAS Scholars, this will be their last event. Office Visit #2 will be an immersive day of exploration. This event is an exceptional opportunity for Scholars to broaden their understanding of opportunities in accounting.

Throughout the day, they'll visit organizations that employ CPAs and gain insights into various areas of the profession. The Scholars will engage with CPAs across positions and experience levels, they'll have the chance to ask questions and delve deeper into their aspirations.

## Discussion Guide:



**Learning from Experience:** Talk about the value of interacting with CPAs in different positions and levels of experience. Encourage your Scholar to ask about day-to-day responsibilities, challenges, and insights gained.

**Asking Informed Questions:** Emphasize the importance of preparing questions. Encourage your Scholar to ask about specific roles, career trajectories, and skills required in different areas of accounting.

**Professional Networking:** Explore the networking opportunities during the visit. Discuss the benefits of connecting with CPAs, exchanging contact information, and building relationships for future guidance.

**Reflecting on Insights:** Urge your Scholar to reflect on their experience in the INCPAS Scholars program. Encourage them to consider how these experiences align with their aspirations and how they can apply the knowledge they gained in the program.

**Next Steps:** For many Scholars, this will be their last event. If your Scholar is graduating, offer guidance for a fun and responsible summer and first semester of college. If you plan to maintain your relationship, set-up additional times to talk in the future.



# OFFICE VISIT #3

**JUNE**

**Event:** Office Visit #3

**Date:** July XX from 9 a.m.-4 p.m.

**Drop-off/Pick-up:** Indiana CPA Society

**Suggested Attire:** Business Casual

This will be the last INCPAS Scholars event. Office Visit #3 will be an immersive day of exploration. This event is an exceptional opportunity for Scholars to broaden their understanding of opportunities in accounting.

Throughout the day, they'll visit organizations that employ CPAs and gain insights into various areas of the profession. The Scholars will engage with CPAs across positions and experience levels, they'll have the chance to ask questions and delve deeper into their aspirations.

## Discussion Guide:



**Learning from Experience:** Talk about the value of interacting with CPAs in different positions and levels of experience. Encourage your Scholar to ask about day-to-day responsibilities, challenges, and insights gained.

**Asking Informed Questions:** Emphasize the importance of preparing questions. Encourage your Scholar to ask about specific roles, career trajectories, and skills required in different areas of accounting.

**Professional Networking:** Explore the networking opportunities during the visit. Discuss the benefits of connecting with CPAs, exchanging contact information, and building relationships for future guidance.

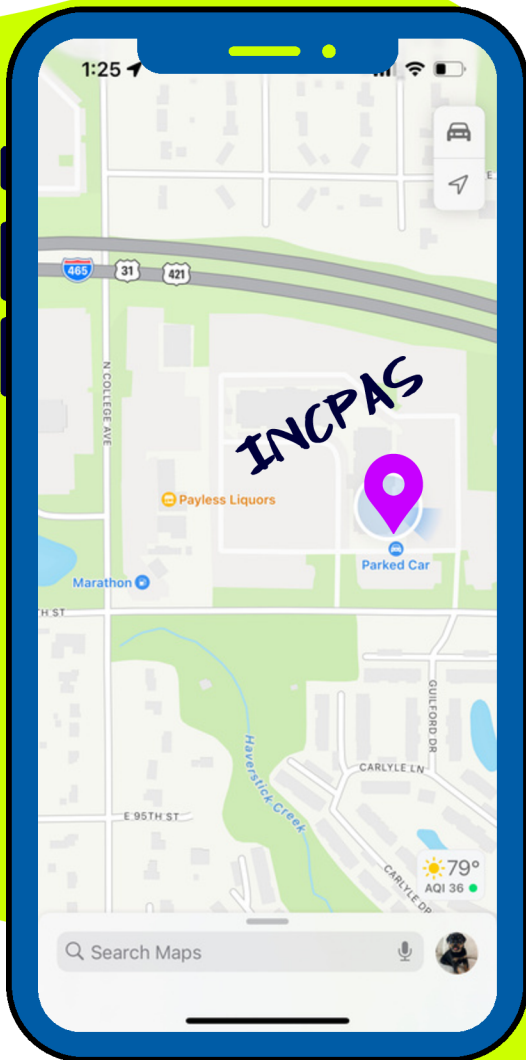
**Reflecting on Insights:** Urge your Scholar to reflect on their experience in the INCPAS Scholars program. Encourage them to consider how these experiences align with their aspirations and how they can apply the knowledge they gained in the program.

**Next Steps:** This is the last INCPAS Scholars event. If your Scholar is graduating, offer guidance for a fun and responsible summer and first semester of college. If you plan to maintain your relationship, set-up additional times to talk in the future.



# WHERE TO GO

Prior to every INCPAS Scholars event, you'll receive an email and a text message with the event details. This will always include the address of our event and suggested parking. It's important to take into account traffic and make sure you have plenty of time to get to our drop-off location. **We do not wait for late arrivals.**



*most of our events  
will begin here!*

## INCPAS OFFICE

**900 E. 96th St., #250  
Indianapolis, IN 46240**

You can park (or get dropped) on either side of our building. Take the elevator to the second floor. Turn left to exit the elevator and you'll see the INCPAS suite.

## URBAN LEAGUE

**777 Indiana Ave.  
Indianapolis, IN 46204**

In April, we'll meet at the Indianapolis Urban League. There is free parking available in the Urban League's parking lot to the west of the building.

# INCPAS SCHOLARS CALENDAR OF EVENTS

**SEPTEMBER** Welcome Dinner | 6 p.m.-8:30 p.m.

**OCTOBER** Visit to Purdue | 8 a.m.-4 p.m.

**NOVEMBER** College Night | 6-8:30 p.m.

**DECEMBER** Holiday Party | 6-8:30 p.m.

**JANUARY** Meet the Profession | 5:30-8 p.m.

**FEBRUARY** Office Visits | 8 a.m.-4 p.m.

**MARCH** Visit to IU | 8 a.m.-4 p.m.

**APRIL** Walk & Talk | 5:30-7:30 p.m.

**MAY** CPA Week

**JUNE** Office Visits | 9 a.m.-4 p.m.

**JULY** Office Visits | 9 a.m.-4 p.m.