



**ACADEMIC MENTORING  
FINANCE AND ACCOUNTING**

Mentor Name: \_\_\_\_\_  
 Phone: \_\_\_\_\_ Best Time to Call: \_\_\_\_\_ a.m. \_\_\_\_\_ p.m.  
 Email: \_\_\_\_\_

Learner Name: \_\_\_\_\_  
 Degree Earning: \_\_\_ Master \_\_\_ Doctorate \_\_\_ Post-Doctorate: Course No. \_\_\_\_\_  
 Phone: \_\_\_\_\_ Best Time to Call: \_\_\_\_\_ a.m. \_\_\_\_\_ p.m.  
 Email: \_\_\_\_\_

Research Topic

\_\_\_\_\_

Recommended Primary Areas to Research

*Style of Leaders:* \_\_\_ Level 5 \_\_\_ Transformational \_\_\_ Visionary \_\_\_ Other: \_\_\_\_\_

*Key Terms:* \_\_\_ Trait/Role: \_\_\_\_\_ Skill: \_\_\_\_\_

\_\_\_ Auditing \_\_\_ Bankruptcy \_\_\_ Budget \_\_\_ Consulting \_\_\_ Credit report (hard or soft inquiry)  
 \_\_\_ Decision-making \_\_\_ Easy lending \_\_\_ Exposure management \_\_\_ Fraud \_\_\_ Free market  
 \_\_\_ Gold/silver/copper \_\_\_ Inflation \_\_\_ Investment plan \_\_\_ Inventory numbers \_\_\_ Mentoring  
 \_\_\_ Portfolio \_\_\_ Predictions \_\_\_ Risk \_\_\_ Recession \_\_\_ Stakeholders \_\_\_ Stock market \_\_\_ Taxes  
 \_\_\_ Training \_\_\_ Underrepresentation \_\_\_ Other: \_\_\_\_\_

Focus: \_\_\_ BOD \_\_\_ Congress \_\_\_ FBI \_\_\_ FCC \_\_\_ G7 \_\_\_ IRS \_\_\_ Regulator \_\_\_ Scientist  
 \_\_\_ U.S. Securities/Exchange Commissioner \_\_\_ Minority-owned: \_\_\_ Asian \_\_\_ Black \_\_\_ Puerto Rican

Finance Theory \_\_\_\_\_ Accounting Theory: \_\_\_\_\_

Recommended publication/author/database: \_\_\_\_\_

*Research method and design:*  Critical thinking \_\_\_ Mixed-methods: \_\_\_ concurrent \_\_\_ sequential

\_\_\_ Qualitative: \_\_\_\_\_

\_\_\_ Quantitative: \_\_\_\_\_

Recommended research publication/search engine: \_\_\_\_\_

*Check the blanks if discussed*

University Academic Guidelines: \_\_\_ Mentor's version \_\_\_ Learner's version

Research and Documentation Submission Process

\_\_\_ Population and sample [sampling % and method: \_\_\_\_\_]

\_\_\_ Type of qualitative analysis: \_\_\_ *a priori* \_\_\_ emergent \_\_\_ other: \_\_\_\_\_

\_\_\_ Type of quantitative analysis: \_\_\_ *a priori* \_\_\_ content \_\_\_ other: \_\_\_\_\_

\_\_\_ Possible cost of traveling to interview and contracting a data analyst or statistician

\_\_\_ Edited prior to final submission \_\_\_ Unedited prior to final submission

\_\_\_ Name and version of editing publication: \_\_\_\_\_

\_\_\_ Rules on plagiarism \_\_\_ Possible cost of editorial, transcription, and translation services

\_\_\_ Approval of mentor prior to forwarding to committee members

Other: \_\_\_\_\_

Scholastic Preparation

\_\_\_ Writing/publishing while learning \_\_\_ Importance of networking/netweaving \_\_\_ Fellowships

Mentor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Learner Signature: \_\_\_\_\_ Date: \_\_\_\_\_

