

## Finance Associate Interview Questions

1. What is the key to success when communicating with the public.
2. How do stay up to date in order to maintain knowledge of tax code changes, and of accounting procedures and theory to properly evaluate financial information?
3. Describe methods you have found effective to collect taxes from individuals or businesses according to prescribed laws and regulations.
4. Name an example when you conferred with taxpayers or their representatives to discuss the issues, laws, and regulations involved in returns, and to resolve problems with returns.
5. Share an experience you had in dealing with a difficult person and how you handled the situation.
6. Tell me how you organize, plan, and prioritize your work.
7. Would you consider analyzing data or information a strength? How so?
8. Share an example of a time you had to gather information from multiple sources. How did you determine which information was relevant?
9. Provide an example of a time when you were able to demonstrate excellent listening skills. What was the situation and outcome?
10. Provide an example when your ethics were tested.
11. Name a time when your patience was tested. How did you keep your emotions in check?
12. Tell me about a time when you developed your own way of doing things or were self-motivated to finish an important task.
13. Share an experience in which your attention to detail and thoroughness had an impact on your last company.
14. Provide a time when you dealt calmly and effectively with a high-stress situation.

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15. What have you found to be the best way to maintain records for each case, including contacts, telephone numbers, and actions taken?

16. Share a time when you willingly took on additional responsibilities or challenges. How did you successfully meet all of the demands of these responsibilities? (Make sure the candidate is a self-starter and can demonstrate some initiative.)

17. Name a time when you had to contact taxpayers by mail or telephone to address discrepancies and to request supporting documentation. What was the outcome?

18. Share an example of when you established and accomplished a goal that was personally challenging. What helped you succeed?

19. Walk me through how you would conduct independent field audits and investigations of income tax returns to verify information or to amend tax liabilities.

20. What is the most challenging part of sending notices to taxpayers when accounts are delinquent? Share an example.

21. Share an effective system to investigate claims of inability to pay taxes by researching court information for the status of liens, mortgages, or financial statements, or by locating assets through third parties.

22. What kind of experience do you have reviewing selected tax returns to determine the nature and extent of audits to be performed on them?

23. What is the secret to check tax forms to verify that names and taxpayer identification numbers are correct, that computations have been performed correctly, or that amounts match those on supporting documentation?

24. What have you found to be the best way to review filed tax returns to determine whether claimed tax credits and deductions are allowed by law?

25. Describe an experience when you examined accounting systems and records to determine whether accounting methods used were appropriate and in compliance with statutory provisions.

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26. Name a time when you had to recommend criminal prosecutions or civil penalties.

27. Provide an example of when you were persistent in the face of obstacles.

28. How challenging is it to impose payment deadlines on delinquent taxpayers and monitor payments to ensure that deadlines are met? Share an example.

29. Share an experience in which your willingness to lead or offer an opinion helped your company.

30. Share an example when you participated in informal appeals hearings on contested cases from other agents.

31. Name a time when your creativity or alternative thinking solved a problem in your workplace.

32. Describe methods you have found effective to direct service of legal documents, such as subpoenas, warrants, notices of assessment and garnishments.

33. How would you rate your writing skills? (Ask for an example that demonstrates great writing skills.)

34. Tell me about the last time when you secured a taxpayer's agreement to discharge a tax assessment, or submitted contested determinations to other administrative or judicial conferees for appeals hearings.

35. Share an effective approach to determine appropriate methods of debt settlement, such as offers of compromise, wage garnishment, or seizure and sale of property.

36. Give me an example of when you thought outside of the box. How did it help your employer?

37. Provide an example of a time when you successfully organized a diverse group of people to accomplish a task.

38. Provide a time when you were able to identify a complex problem, evaluate the options, and implement a solution. How did the solution benefit your employer?

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39. Share an experience in which you successfully coordinated with others. How about a coordination effort that was not as successful?

40. Tell me about the last time you monitored or reviewed information and detected a problem. How did you respond?

41. Describe an experience when you installed systems of recording costs or other financial and budgetary data or provided advice on such systems, based on examination of current financial records.