

## Estate Planner Interview Questions

1. Tell me how you organize, plan, and prioritize your work.

2. Share an effective method you have used to sell various insurance policies.

3. What is the key to success when communicating with the public.

4. Share an experience you had in dealing with a difficult person and how you handled the situation.

5. Share an experience when you applied new technology or information in your job. How did it help your company?

6. Tell me about an experience in which you analyzed information and evaluated results to choose the best solution to a problem.

7. Share an effective approach to working with a large amount of information/data. How has your approach affected your company?

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. Please share an experience in which you presented to a group. What was the situation and how did it go?

11. Provide an example when your ethics were tested.

12. Share an experience in which your attention to detail and thoroughness had an impact on your last company.

13. Share an example of when you went above and beyond the "call of duty". (Look for answers that show the candidate is dependable.)

14. Provide an effective method you have used to seek out new clients and develop clientele. Share an

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experience.

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

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. Describe a time when you customized an insurance program to suit an individual.

18. Provide an experience in which your ability to actively find ways to help people improved your company or your own work ethic.

19. Describe a time when you successfully persuaded another person to change his/her way of thinking or behavior.

20. Provide a time when you dealt calmly and effectively with a high-stress situation.