

## Financial Services Counselor Interview Questions

1. Provide an example of a time when you were able to demonstrate excellent listening skills. What was the situation and outcome?

2. Provide an experience in which you compiled information about new accounts.

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 in which you successfully shared a difficult piece of information. (Make sure that the candidate has open lines of communication.)

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

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

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

9. In your experience, what is the key to ensuring your company was compliant with all laws, regulations and standards that were applicable to your area of responsibility?

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

11. Share an example of a time you had to gather information from multiple sources. How did you determine which information was relevant?

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

13. Provide an example when your ethics were tested.

14. Share an effective method you have used to answer customers' questions, explain services, and inform

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them of procedures. Provide an experience.

15. Describe your experience performing teller duties.

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

17. How do you balance cooperation with others and independent thinking? Share an example. (Try to determine if the candidate has a cooperative attitude or is otherwise good-natured.)

18. Name a time when your patience was tested. How did you keep your emotions in check?

19. Share an experience in which you processed loan applications.

20. Share an experience in which you investigated and corrected a difficult error.