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Financial Planner Interview Questions

1. Why did you decide to apply for a position of a Financial Planner?
2. Please tell us something about your experience.
3. Try to sell me this notepad (pen, your mobile phone, umbrella, certain loan or financial product).
4. Do you have a certification? (Why didn't you get your CFP yet?)
5. What's the most difficult financial problem you've faced with a client? How did you address the problem?
6. Imagine that we gave you one one million dollars right now to invest. What would you do with the money?
7. How do you ensure to keep your knowledge of industry best practices and regulations up to date?
8. How do you feel about making cold calls?
9. Can you tell us something about your existing client portfolio?
10. If we hire you for this job, how do you imagine a typical day in work, and what will be the first thing you'll do when starting?
11. Imagine that I have no knowledge of financial terminology. Try to explain to me cryptocurrency and the investment opportunity it offers.
12. In your opinion, how often should we be in touch with our existing clients?
13. Here is our cash flow statement for the last fiscal year. Please study it briefly, and tell us your observations (recommendations).
14. Do you have any experience with statistics, financial analysis, or budgeting software? How do they help you in your work?
15. What do you consider the biggest failure of your professional career?

Source and answers to the questions: <https://interviewpenguin.com/financial-planner-interview/>