
Finance Analyst interview questions and answers

This **Financial Analyst interview profile** brings together a snapshot of what to look for in candidates with a balanced sample of suitable interview questions.

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Financial Analyst Interview Questions

The basic profile of [financial analyst](#) candidates will consist of three elements: education, experience and professional credentials. Their educational background will probably involve degrees in accounting or finance so looking for credentials such as Chartered Financial Analyst (CFA) might help you reduce the initial pool of candidates. Usually, at least a couple years of experience are required for non-junior roles. According to the requirements of your position, you can look for less or more experience in the particular role or industry.

After the initial screening, you need to find out whether a candidate possesses the right hard and soft skills to do the job successfully. It is a good idea to start an interview with the absolute basics: the level of their professional knowledge, how they use this knowledge to attain different objectives and how they keep up with news and current developments. Technical questions can serve this purpose. If your company uses any specific methods or tools, you might also want to ask them about those. Other skills needed such as orientation to detail, analytical ability and reliability can be assessed through both situational and behavioral questions. If you expect the role to involve high interaction with others (e.g. investors or colleagues), you can ask about their communication and presentation abilities as well.

Operational and Situational questions

- Imagine that you hand in a report you are not satisfied with. Later you discover that you made a mistake although your supervisor doesn't notice. How would you handle it?
- Envisage that you are talking to someone who has no financial background. How would you explain the concept of solvency/IRR/ROE etc.
- If you had to make a decision about a loan, what are the most important elements you need to consider?
- Envisage senior management asks you to create a quick report presenting the financial data they are most interested in. What would you include in that report?
- Imagine you have to convince an investor of the company's overall health. What are some important concepts or metrics you need to present?
- Suppose the company shows positive cash flow and management asks you if that means

the company is doing well. What do you reply?

Role-specific questions

- How do your credentials make you better at your job?
- Do you have experience in [_____]? (e.g. benchmarking, DCF analysis)
- What is NPV and where would you use it?
- Name the 4 financial statements and how they connect with each other
- Describe and explain a cash flow statement
- If debts owed to the company increase, how would the income statement change?
- Name a few ratios that can help you evaluate a company
- What information/model would you need to produce an annual forecasting report?
- How would you rate your proficiency in Excel?
- Have you ever used this (specific) financial analysis software?
- What methods could you use for selecting a project? How would WACC and IRR help you?
- What is important to consider/calculate when reaching a decision on an investment?
- What developments do you see in the economy of the (specific) industry?
- Do you follow the stock market? Which stocks in particular?

Behavioral questions

- Tell me about a time you had to handle large amounts of data. How did you ensure accuracy?
- Give an example of a time you found a mistake among a large set of data
- Have you ever disagreed with your manager and how did you handle it?
- What was the most difficult problem you've had to solve and how did you do it?
- What do you think was your most successful project?
- Describe a time when your knowledge of current events helped you produce better results
- Have you ever fallen behind schedule for a project? What did you do to catch up?
- Describe a time when a piece of your advice as a financial analyst helped senior management make a better decision?
- Tell us about a time you made a bad financial decision. How would you avoid that happening again?