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## Financial Specialist interview questions

Use these sample Financial Specialist interview questions as part of your hiring process to recruit candidates for senior-level roles.

### Financial Specialist Interview Questions

[Financial Specialists](#) help companies make strategic decisions on short-term and long-term investments. They perform cost analyses, prepare budget reports and evaluate current accounting trends.

During your screening process, look for candidates who combine a degree in Finance or Economics with relevant work experience in a senior-level role. Candidates with additional certification (e.g. CPA or CFA) will stand out. Also, look for candidates who have working knowledge of statistical analysis software.

When interviewing candidates, keep an eye out for people who present and explain financial plans using clear language. Also, test how they've used their [analytical skills](#) to design investment models and advise on financial risks. Instead of jumping to quick conclusions, your ideal candidates will ask follow-up questions and reach logical decisions when you pose hypothetical scenarios about job-related challenges,

### Operational and Situational questions

- What data would you collect to conduct a benchmark analysis?
- The CEO informs you they plan to make an investment (e.g. open a new store in a foreign country.) How would you begin advising them?
- What factors would you take into consideration before advising a company to take (or not take) a loan?
- What would you do if you found a mistake in a report you prepared but your manager hadn't noticed?
- What metrics would you present to investors to describe the company's financial health?

### Role-specific questions

- Describe the budgeting process step-by-step.
- What financial and statistical analysis software have you used?
- What kinds of reports do you prepare or monitor on a regular basis? How do you use this information?
- What kind of financial model will help you build an annual forecasting report?

- What's the use of the Weighted Average Cost Of Capital (WACC)? How will an increase in debt affect it?
- What is a good Internal Rate of Return (IRR) on an investment? What formula do you use to calculate it?

## **Behavioral questions**

- Describe a time when you coordinated a challenging financial task, e.g. audits or tax collections.
- Give an example of a time when your attention to detail saved you from a making a mistake at work.
- How do you learn about global economic issues? What are the biggest challenges that companies of our industry will face in the next years?
- How would you describe your leadership style? How do you delegate tasks to your team members?