

CANDIDATE	INTERVIEWER	DATE	STAGE
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INTERVIEW QUESTIONS · FINANCIAL MANAGER

1	Can you provide an example of a financial plan you created?	1 2 3 4 5	
2	What is your understanding of investment management?	1 2 3 4 5	
3	What methods do you use to stay current on economic trends?	1 2 3 4 5	
4	How do you handle difficult conversations with clients or shareholders?	1 2 3 4 5	
5	Can you think of an instance where you utilized creative problem-solving as Financial Manager?	1 2 3 4 5	
6	What is your experience with financial analysis and forecasting?	1 2 3 4 5	
7	Can you give me an overview of your experience with accounting and bookkeeping?	1 2 3 4 5	
8	What system do you prefer for tracking expenses and budgeting?	1 2 3 4 5	
9	What experience do you have with developing and implementing financial policies?	1 2 3 4 5	
10	What software platforms are you familiar with using for financial analysis and modeling?	1 2 3 4 5	

OVERALL ASSESSMENT

CRITERIA	SCORE (1-5)	NOTES
Educational Background Appropriate qualifications or training for the position.	1 2 3 4 5	
Prior Work Experience Skills or qualifications acquired through past work.	1 2 3 4 5	
Qualifications / Experience The technical skills the position actually needs.	1 2 3 4 5	
Problem Solving Abilities Demonstrated critical problem-solving.	1 2 3 4 5	
Communication Team building and communication skills.	1 2 3 4 5	
Organizational Fit Would this hire steer the organization the right way?	1 2 3 4 5	

CRITERIA

SCORE (1-5) NOTES

Directional Fit

A step forward, or backward, in their career?

1 2 3 4 5

RECOMMENDATION

☐ Advance ☐ Hold ☐ Decline

1 = well below the bar · 3 = meets it · 5 = clearly above it

AvaHR — hiring software for teams without a recruiter
Use the same scorecard for every candidate in this role.