

CANDIDATE	INTERVIEWER	DATE	STAGE
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INTERVIEW QUESTIONS · LOAN OFFICER ASSISTANT

1	What experience do you have working as a Loan Officer Assistant?	1 2 3 4 5	
2	Describe your knowledge of mortgage loan processing and lending laws.	1 2 3 4 5	
3	How would you handle customer inquiries in regard to loan terms and interest rates?	1 2 3 4 5	
4	Are you familiar with the Equal Credit Opportunity Act (ECOA) requirements?	1 2 3 4 5	
5	What is your experience using loan processing software like Encompass or Calyx Point?	1 2 3 4 5	
6	Do you have any experience dealing with documentation, prequalification letters, or appraisal reviews?	1 2 3 4 5	
7	How do you stay up to date with changing laws in the lending industry?	1 2 3 4 5	
8	Are you familiar with Anti Money Laundering (AML) regulations and requirements?	1 2 3 4 5	
9	What techniques do you use to ensure accuracy when processing loans?	1 2 3 4 5	
10	How do you prioritize tasks and manage multiple loan applications at the same time?	1 2 3 4 5	
11	What challenges have you faced while working as a Loan Officer Assistant, and how did you resolve them?	1 2 3 4 5	
12	Describe your customer service skills and how they would help in this role.	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	

CRITERIA	SCORE (1-5)	NOTES
Organizational Fit Would this hire steer the organization the right way?	12345	
Directional Fit A step forward, or backward, in their career?	12345	

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.