

| CANDIDATE | INTERVIEWER | DATE | STAGE |
|-----------|-------------|------|-------|
|-----------|-------------|------|-------|

INTERVIEW QUESTIONS · UNDERWRITER

|    |                                                                                                 |       |  |
|----|-------------------------------------------------------------------------------------------------|-------|--|
| 1  | What is your experience with underwriting?                                                      | 12345 |  |
| 2  | What are some of the most significant risks you have evaluated?                                 | 12345 |  |
| 3  | What is your process for assessing risk?                                                        | 12345 |  |
| 4  | How do you handle a client who requests a policy that you deem too risky?                       | 12345 |  |
| 5  | Have you ever had to cancel a policy? If so, why?                                               | 12345 |  |
| 6  | What are some of the most common mistakes people make regarding their insurance coverage?       | 12345 |  |
| 7  | How do you work with clients to ensure they have the best range possible?                       | 12345 |  |
| 8  | What are some of the most common questions you get from clients about their insurance coverage? | 12345 |  |
| 9  | How do you help clients understand their policy coverage?                                       | 12345 |  |
| 10 | Do you have any tips for people saving money on their insurance premiums?                       | 12345 |  |

OVERALL ASSESSMENT

| CRITERIA                                                                                  | SCORE (1-5) | NOTES |
|-------------------------------------------------------------------------------------------|-------------|-------|
| <b>Educational Background</b><br>Appropriate qualifications or training for the position. | 12345       |       |
| <b>Prior Work Experience</b><br>Skills or qualifications acquired through past work.      | 12345       |       |
| <b>Qualifications / Experience</b><br>The technical skills the position actually needs.   | 12345       |       |
| <b>Problem Solving Abilities</b><br>Demonstrated critical problem-solving.                | 12345       |       |
| <b>Communication</b><br>Team building and communication skills.                           | 12345       |       |
| <b>Organizational Fit</b><br>Would this hire steer the organization the right way?        | 12345       |       |
| <b>Directional Fit</b><br>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.