

INTERVIEW YOUR CANDIDATE

Background

What is your educational background?

University degree

Area of study: _____

Graduate degree

Area of study: _____

What are your financial planning credentials?

How long have you been in this business?

Do you have clients who might be willing to speak with me about your services?

Yes

No

If no, explain:

Will you provide me with references from other professionals?

Yes

No

If no, explain:

Have you ever been cited by a professional or regulatory governing body for disciplinary reasons?

Yes

No

If yes, explain:

Describe your financial planning work experience or attach your resume.