The Art of The Interview

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Presented by
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The Art

Body Language

Relaxed candidates will be more themselves.

Bring energy you want them to mirror.

Ask Open Questions

“Tell me about a time…”

“Tell me more…”

“How did you handle…”

Thank You

Watch for a thank you note or email.
PLUS
If you like them, thank them!

Interview Q's

Branch Office Administrator (BOA)

1. Tell me about a time when you had to juggle multiple client requests or administrative tasks at once. How did you prioritize and what was the outcome?
2. How do you handle difficult or frustrated clients, especially when you're not able to immediately solve their issue?
3. Edward Jones values strong partnerships between BOAs and Financial Advisors. What does a successful partnership look like to you?
4. What systems or routines do you use to stay organized in a fast-paced environment with frequent interruptions?

Interview Q's

Registered Branch Associate

1. Give an example of a time when you had to explain a complex investment product or strategy to a client. How did you ensure they fully understood?
2. Describe a situation where you had to navigate a compliance concern or flagged activity. What steps did you take?
3. How do you balance efficiency with accuracy in a role that involves both paperwork and client-facing responsibilities?
4. Tell me about a time you disagreed with a Financial Advisor or team member about how to handle a client situation. How did you resolve it?

Interview Q's

Associate Financial Advisor

1. Describe how you approach deepening relationships with existing clients. Can you share a specific example where you added value beyond the initial plan?
2. How do you balance building your own book of business with supporting the lead Financial Advisor?
3. What steps do you take to stay current on market trends and translate that into client conversations?
4. Tell me about a time you had to reframe or adjust a client's financial strategy based on a change in their circumstances or goals.

Interview Q's

Client Support Team

1. Give an example of a time when you received multiple competing requests from different advisors. How did you decide what to handle first?
2. How do you ensure consistency and quality in your work when supporting a high volume of internal clients?
3. Describe a time you identified a process that could be improved to better advisors. What did you do?
4. Tell me about a time when you had to deliver difficult feedback or a policy update to a branch team. How did you approach it?

BOA Scorecard

Category	Description	1-5
Client Service Orientation	Demonstrates empathy, professionalism, and tact in client interactions.	
Organization & Prioritization	Can manage multiple tasks and deadlines effectively.	
Communication Skills	Clear, confident, and professional in both written and verbal communication.	
Partnership Mindset	Shows understanding of how to support and collaborate with an FA.	
Technology & Systems Comfort	Able to quickly learn and effectively use internal tools and software.	

Registered Branch Associate Scorecard

Category	Description	1-5
Client Interaction & Service	Provides knowledgeable, responsive support to clients.	
Compliance & Risk Awareness	Understands and follows regulatory guidelines and firm policies.	
Technical Financial Knowledge	Demonstrates comfort discussing products, transactions, and forms.	
Collaboration & Support	Proactive in supporting the advisor and branch goals.	
Attention to Detail	Maintains high accuracy in documentation and execution.	

Associate Financial Advisor Scorecard

CMC

Category	Description	1-5
Relationship Building	Builds trust and deepens client relationships authentically.	
Business Development Mindset	Shows initiative in growing the practice or client base.	
Financial Acumen	Demonstrates understanding of planning strategies and market dynamics.	
Team Collaboration	Works well with lead advisor and other staff to support client goals.	
Communication & Presentation	Explains complex financial topics clearly and confidently.	

Client Support Team Scorecard

Category	Description	1-5
Responsiveness & Service	Prompt, professional support to internal and external partners.	
Problem Solving	Demonstrates resourcefulness in resolving issues or escalating appropriately.	
Multitasking & Efficiency	Manages high-volume workload with accuracy.	\
Communication & Tone	Professional, calm, and clear in all communication channels.	
Process & Policy Knowledge	Understands Edward Jones systems, protocols, and best practices.	

Thank you

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