Accountant Reference Check Template

For phone or written reference checks. Use the same questions for every referee so answers are comparable.

1. Candidate and referee details

Candidate name

Role applied for

Referee name

Referee job title and organisation

Referee email and phone

Relationship to the candidate (for example, direct manager)

Date of reference check

Checked by

2. Consent

Confirm the candidate agreed to you contacting this referee. Tell the referee their answers are used only for this hiring decision.

Candidate consent confirmed (yes / no)

Date consent was given

3. Verification questions

1. How do you know the candidate, and what was your working relationship?

2. What were the candidate's start and end dates, as far as you remember them?

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3. What was their job title, and did it change while you worked together?

4. Did the candidate report to you directly? If not, how often did you see their work?

5. What were the main reasons the candidate left, as far as you know?

4. Performance questions

6. Which parts of the role did the candidate own day to day?

7. Tell me about a deadline the candidate missed or nearly missed. What happened next?

8. Give an example of the candidate producing good work with incomplete information.

9. What result improved while they were in the role, and what was their contribution?

10. When results were below expectations, how did they respond to feedback?

11. What skill did the candidate develop most while you worked together?

5. Accountant questions

12. What were the candidate's main responsibilities: payables, payroll, reconciliations, reporting?

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13. How accurate was their work? Were errors caught by them or by others?

14. How did they handle month-end, year-end and tax deadlines?

15. Which accounting systems did they use, and how well?

16. How did they explain numbers to non-finance managers?

17. Did they ever raise a concern about a transaction or a control?

18. Were there ever concerns about how they handled money or approvals?

19. Would you trust them with your books again?

6. Working style and integrity

20. Describe a disagreement the candidate had with a colleague. How did they move the work forward?

21. How did the candidate ask for help when they needed it?

22. When the candidate made a mistake that affected others, what did they do?

23. What would you tell a new manager about working with this person?

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7. Closing questions

24. Is there anything we have not asked that you think we should know?

25. What kind of manager or team would get the best out of this person?

26. Would you hire or work with this person again? Why or why not?

8. Recommendation

Overall: recommend / recommend with reservations / do not recommend

Strengths confirmed

Concerns or follow-ups

Signed and dated

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