

Template: Broker Support Evaluation Checklist

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Based on Article: "Evaluating Customer Support: A Key Factor in Forex Broker Selection"

Website: <https://thetraderinyou.com>

A practical checklist for evaluating customer support when selecting a Forex broker.

Checklist Items:

- ☐ **1. Assess Support Channels**
Determine which channels the broker offers (phone, live chat, email, social media, knowledge base) and their suitability for your needs.
Reference Section: Common support channels and what they're best for
- ☐ **2. Test Responsiveness**
Contact the broker's support using a sample question during market hours to evaluate how quickly they respond.
Reference Section: Practical example
- ☐ **3. Evaluate Technical Capability**
Ensure that support agents possess the technical knowledge required to resolve complex issues efficiently.
Reference Section: In-house vs outsourced support — why it matters
- ☐ **4. Check Service Level Agreements (SLAs)**
Inquire about response and resolution times for different types of issues (chat, email, ticketing) to understand what to expect.
Reference Section: SLA example
- ☐ **5. Understand Escalation Procedures**
Ask how issues are escalated to technical teams and the process for complex problem resolution.
Reference Section: Escalation
- ☐ **6. Review Common Issues Handled**
Investigate the types of support requests the broker typically resolves (technical, transactional, informational) to gauge their expertise.
Reference Section: What Is Forex Broker Customer Support?
- ☐ **7. Examine Availability**
Determine the support hours and whether they provide 24/7 assistance, as this can be critical during high-volatility trading hours.
Reference Section: How Does Broker Support Work?
- ☐ **8. Read Customer Reviews**
Look for independent reviews of the broker's support service to gain insights from other traders' experiences.
Reference Section: Selecting a Broker Based on Support — Practical Recommendations