

# Template: Forex Customer Support Evaluation Checklist

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Based on Article: "The Importance of Customer Support in Forex Trading: What to Expect"

Website: <https://thetraderinyou.com>

A practical checklist to assess the quality and responsiveness of forex broker customer support before committing to an account.

## Checklist Items:

- 1. Check Availability Hours**  
Verify the hours during which customer support is available, especially for urgent issues related to trading. Look for 24/7 support for high-risk instruments.  
Reference Section: Common service expectations
- 2. Evaluate Support Channels**  
Ensure the broker offers multiple support channels such as phone, live chat, email, and client portal messaging for different situations.  
Reference Section: Channels and when to use them
- 3. Test Response Times**  
Conduct a test by reaching out through different channels to measure response times and efficiency during market hours.  
Reference Section: Common support channels and their typical response times and best-use scenarios
- 4. Assess Technical Knowledge**  
Inquire about technical issues related to platform quirks to gauge the expertise of the support staff.  
Reference Section: What excellent support looks like — Service Benchmarks
- 5. Request Documentation Procedures**  
Ask about the process for handling complaints and disputes to understand how well they maintain records and handle issues.  
Reference Section: Common misconceptions about broker support
- 6. Understand Escalation Paths**  
Inquire about the escalation paths for unresolved issues, ensuring there are clear procedures for higher-level support when needed.  
Reference Section: How does broker support work? (Mechanics)
- 7. Review SLA Information**  
Check if the broker provides Service Level Agreements (SLAs) detailing response and resolution times for various issue severities.  
Reference Section: SLA examples for different issue severities (critical, high, medium, low)
- 8. Confirm Language Support**  
Verify if the support team can communicate in your preferred language, especially if you're non-native to the primary language of the broker.  
Reference Section: How regulation and geography change support

## **9. Check for Educational Resources**

Look for available resources such as tutorials or FAQs that can help you understand the platform and its features before needing support assistance.

Reference Section: What Is Forex Broker Customer Support?