

Which of the following statements best describes how you are managing your investable assets during the COVID-19 pandemic?

	Total	Financial advisor			
		During pandemic	Before pandemic	Myself	Use advisor (NET)
		A	B	C	D
Base: All Answering (unwtd)	863	53	342	427	395
Base: All Answering (wtd)	838	52	302	429	354
Use Advisor (Net)	354	52	302	-	354
	42%	100%	100%	-	100%
		C*	C		C
I started using a financial advisor during the COVID-19 pandemic	52	52	-	-	52
	6%	100%	-	-	15%
		BCD*			BC
I have been using a financial advisor since before the COVID-19 pandemic began	302	-	302	-	302
	36%	-	100%	-	85%
		*	ACD		AC
I manage my investments myself (can include use of online tools, calculators, etc.)	429	-	-	429	-
	51%	-	-	100%	-
		*		ABD	
Other	11	-	-	-	-
	1%	-	-	-	-
		*			
None/ no investments	34	-	-	-	-
	4%	-	-	-	-
		*			
Don't know	9	-	-	-	-
	1%	-	-	-	-
		*			
Sigma	838	52	302	429	354
	100%	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C/D

Minimum Base: 30 (**), Small Base: 100 (*)

- Column Means:

Columns Tested (5%): A/B/C/D

Minimum Base: 30 (**), Small Base: 100 (*)

Thinking of your financial plans or goals, which of the following, if any, have changed due to the COVID-19 pandemic?

	Total	Financial advisor			
		During pandemic	Before pandemic	Myself	Use advisor (NET)
		A	B	C	D
Base: All Answering (unwtd)	863	53	342	427	395
Base: All Answering (wtd)	838	52	302	429	354
Made Changes (Net)	346	41	113	180	154
	41%	80%	37%	42%	44%
		BCD*			B
I have cashed in some/all of my RRSPs	59	5	22	31	27
	7%	10%	7%	7%	8%
		*			
I have cashed in some/all of my stocks or bonds	49	5	14	29	19
	6%	10%	5%	7%	5%
		*			
I have made changes to the asset allocation of my investment/savings portfolio	89	14	32	42	47
	11%	27%	11%	10%	13%
		BCD*			B
I have moved some of my investments into safer products	83	12	35	33	47
	10%	24%	11%	8%	13%
		BCD*			BC
I have used my savings	160	13	36	104	50
	19%	25%	12%	24%	14%
		BD*		BD	B
My expected retirement date has been pushed back	51	6	22	24	27
	6%	11%	7%	6%	8%
		*			
My expected retirement date has moved up	33	5	15	13	20
	4%	10%	5%	3%	6%
		C*			
Nothing - I haven't made any of these changes	492	11	189	249	200
	59%	20%	63%	58%	56%
		*	AD	A	A
Sigma	1017	72	365	526	437
	121%	138%	121%	123%	123%

Statistics:

Overlap formulae used

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- Column Means:

Columns Tested (5%): A/B/C/D

Minimum Base: 30 (**), Small Base: 100 (*)

Do you feel more or less financially secure since the COVID-19 pandemic began?

	Total	Financial advisor			
		During pandemic	Before pandemic	Myself	Use advisor (NET)
		A	B	C	D
Base: All Respondents (unwtd)	1001	53	342	427	395
Base: All Respondents (wtd)	1001	52	302	429	354
I feel more financially secure since the COVID-10 pandemic began	81	11	13	40	24
	8%	21%	4%	9%	7%
		BCD*		B	B
I feel less financial secure since the COVID-19 pandemic began	446	27	144	189	171
	45%	51%	48%	44%	48%
		*			
No change in how financially secure I feel since the COVID-10 pandemic began	474	14	145	200	160
	47%	28%	48%	47%	45%
		*	AD	A	A
Sigma	1001	52	302	429	354
	100%	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C/D

Minimum Base: 30 (**), Small Base: 100 (*)

- Column Means:

Columns Tested (5%): A/B/C/D

Minimum Base: 30 (**), Small Base: 100 (*)

Has your mental health been impacted by COVID-19? (e.g. stress levels, anxiety)

	Total	Financial advisor			
		During pandemic	Before pandemic	Myself	Use advisor (NET)
		A	B	C	D
Base: All Respondents (unwtd)	1001	53	342	427	395
Base: All Respondents (wtd)	1001	52	302	429	354
Yes (Net)	645	42	184	284	226
	64%	81%	61%	66%	64%
		BD*			B
Negatively (Subnet)	594	36	169	263	206
	59%	70%	56%	61%	58%
		*			
Yes - very negatively affected	141	13	26	57	39
	14%	25%	9%	13%	11%
		BCD*			B
Yes - somewhat negatively affected	453	23	143	206	166
	45%	45%	47%	48%	47%
		*			
Yes - positively affected	51	6	14	21	20
	5%	11%	5%	5%	6%
		*			
No - not at all	356	10	119	145	129
	36%	19%	39%	34%	36%
		*	AD		A
Sigma	1001	52	302	429	354
	100%	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C/D

Minimum Base: 30 (**), Small Base: 100 (*)

- Column Means:

Columns Tested (5%): A/B/C/D

Minimum Base: 30 (**), Small Base: 100 (*)

What is negatively impacting your mental health? Please

	Total	Financial advisor			
		During pandemic	Before pandemic	Myself	Use advisor (NET)
		A	B	C	D
Base: All Answering (unwtd)	600	35	204	257	239
Base: All Answering (wtd)	594	36	169	263	206
Fear of contracting COVID-19	329 55%	21 59% **	88 52%	139 53%	109 53%
Physical health concerns	195 33%	10 28% **	49 29%	74 28%	60 29%
Concern for loved ones	321 54%	12 33% **	100 59% D	133 51%	112 55%
Caring for children and family members	122 21%	6 17% **	35 20%	57 22%	41 20%
Financial concerns	259 44%	12 32% **	61 36%	123 47% BD	73 35%
Increased workload	72 12%	7 19% **	25 15%	34 13%	32 16%
Unemployment/reduced hours	159 27%	8 23% **	40 24%	76 29%	48 24%
Social isolation	333 56%	17 46% **	95 56%	144 55%	112 54%
Unable to access the things I need/want	200 34%	7 20% **	58 34% D	91 35%	65 32%
Other	28 5%	1 2% **	10 6%	9 3%	11 5%
Don't know	2 *	- - **	- -	- -	- -
Sigma	2018 339%	102 279%	562 332%	882 335%	664 323%

Statistics:

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- Column Means:

Columns Tested (5%): A/B/C/D

Minimum Base: 30 (**), Small Base: 100 (*)