

136_1. Would you say that having a financial plan has helped improve... - Your ability to cope with the current economic environment, financially

	Total	Gender		
		Male	Female	Other/Prefer not to answer
		A	B	C
Base: All Answering (unwtd)	635	341	291	3
Base: All Answering (wtd)	576	306	266	4
Yes	454	246	209	-
	79%	80%	78%	-
No	101	53	46	3
	18%	17%	17%	78%
				**
Don't Know	20	8	11	1
	4%	3%	4%	22%
				**
Sigma	576	306	266	4
	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

- Column Means:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

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136_1. Would you say that having a financial plan has helped improve... - Your ability to cope with the current economic environment, financially

		Age			
	Total	Gen Z	Millennial	Gen X	Boomer
		K	L	M	N
Base: All Answering (unwtd)	635	114	249	140	132
Base: All Answering (wtd)	576	97	186	136	157
Yes	454	83	143	98	130
	79%	86%	77%	72%	82%
		M*		*	*
No	101	9	39	30	23
	18%	10%	21%	22%	15%
		*	K	K*	*
Don't Know	20	4	4	8	4
	4%	4%	2%	6%	3%
		*		*	*
Sigma	576	97	186	136	157
	100%	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

- Column Means:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

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136_2. Would you say that having a financial plan has helped improve... - Your ability to cope with the current economic environment, mentally

	Total	Gender		
		Male	Female	Other/Prefer not to answer
		A	B	C
Base: All Answering (unwtd)	635	341	291	3
Base: All Answering (wtd)	576	306	266	4
Yes	431	241	189	1
	75%	79%	71%	15%
No	108	48	61	-
	19%	16%	23%	-
				**
Don't Know	36	18	16	3
	6%	6%	6%	85%
				**
Sigma	576	306	266	4
	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

- Column Means:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

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136_2. Would you say that having a financial plan has helped improve... - Your ability to cope with the current economic environment, mentally

		Age			
	Total	Gen Z	Millennial	Gen X	Boomer
		K	L	M	N
Base: All Answering (unwtd)	635	114	249	140	132
Base: All Answering (wtd)	576	97	186	136	157
Yes	431	74	136	95	125
	75%	77%	73%	70%	79%
		*		*	*
No	108	12	39	29	28
	19%	12%	21%	22%	17%
		*		*	*
Don't Know	36	10	10	11	5
	6%	11%	6%	8%	3%
		N*		*	*
Sigma	576	97	186	136	157
	100%	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

- Column Means:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

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136_3. Would you say that having a financial plan has helped improve... - Your relationship with your spouse

	Total	Gender		
		Male	Female	Other/Prefer not to answer
		A	B	C
Base: All Answering (unwtd)	448	251	196	1
Base: All Answering (wtd)	403	221	182	1
Yes	295	157	137	-
	73%	71%	76%	-
				**
No	83	48	35	1
	21%	22%	19%	100%
				**
Don't Know	25	16	9	-
	6%	7%	5%	-
				**
Sigma	403	221	182	1
	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

- Column Means:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

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136_3. Would you say that having a financial plan has helped improve... - Your relationship with your spouse

		Age			
	Total	Gen Z	Millennial	Gen X	Boomer
		K	L	M	N
Base: All Answering (unwtd)	448	43	197	103	105
Base: All Answering (wtd)	403	30	146	98	129
Yes	295	26	112	63	93
	73%	85%	77%	65%	73%
		M*		*	*
No	83	5	31	25	23
	21%	15%	21%	25%	18%
		*		*	*
Don't Know	25	-	3	10	12
	6%	-	2%	10%	10%
		*		L*	L*
Sigma	403	30	146	98	129
	100%	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

- Column Means:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

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136_4. Would you say that having a financial plan has helped improve... - Your overall happiness

	Total	Gender		
		Male	Female	Other/Prefer not to answer
		A	B	C
Base: All Answering (unwtd)	635	341	291	3
Base: All Answering (wtd)	576	306	266	4
Yes	450	238	209	2
	78%	78%	79%	64%
				**
No	99	58	40	1
	17%	19%	15%	15%
				**
Don't Know	27	10	16	1
	5%	3%	6%	22%
				**
Sigma	576	306	266	4
	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

- Column Means:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

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136_4. Would you say that having a financial plan has helped improve... - Your overall happiness

		Age			
	Total	Gen Z	Millennial	Gen X	Boomer
		K	L	M	N
Base: All Answering (unwtd)	635	114	249	140	132
Base: All Answering (wtd)	576	97	186	136	157
Yes	450	81	138	104	126
	78%	84%	74%	77%	80%
		*		*	*
No	99	12	42	22	24
	17%	12%	22%	16%	15%
		*		*	*
Don't Know	27	4	6	10	8
	5%	4%	3%	7%	5%
		*		*	*
Sigma	576	97	186	136	157
	100%	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

- Column Means:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

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136_5. Would you say that having a financial plan has helped improve... - Your overall financial health and wellness

	Total	Gender		
		Male	Female	Other/Prefer not to answer
		A	B	C
Base: All Answering (unwtd)	635	341	291	3
Base: All Answering (wtd)	576	306	266	4
Yes	457	244	212	1
	79%	80%	80%	15%
No	90	51	38	-
	16%	17%	14%	-
				**
Don't Know	29	11	15	3
	5%	4%	6%	85%
				**
Sigma	576	306	266	4
	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

- Column Means:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

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136_5. Would you say that having a financial plan has helped improve... - Your overall financial health and wellness

		Age			
	Total	Gen Z	Millennial	Gen X	Boomer
		K	L	M	N
Base: All Answering (unwtd)	635	114	249	140	132
Base: All Answering (wtd)	576	97	186	136	157
Yes	457	77	138	106	134
	79%	80%	74%	78%	85%
		*		*	L*
No	90	12	43	19	15
	16%	12%	23%	14%	10%
		*	KN	*	*
Don't Know	29	8	4	10	7
	5%	8%	2%	8%	5%
		L*		*	*
Sigma	576	97	186	136	157
	100%	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

- Column Means:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

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137_1. Please rate the extent to which you agree or disagree with each statement, as it relates to your financial advisor. - I feel better about my financial situation, thanks to my financial advisor

	Total	Gender		
		Male	Female	Other/Prefer not to answer
		A	B	C
Base: All Answering (unwtd)	842	415	425	2
Base: All Answering (wtd)	793	389	403	1
Top 2 Box (Net)	629	321	308	*
	79%	83%	76%	42%
				**
Strongly agree	203	106	96	*
	26%	27%	24%	42%
				**
Somewhat agree	426	215	211	-
	54%	55%	52%	-
				**
Bottom 2 Box (Net)	134	59	75	1
	17%	15%	19%	58%
				**
Somewhat disagree	114	51	63	1
	14%	13%	16%	58%
				**
Strongly disagree	20	8	12	-
	3%	2%	3%	-
				**
Don't Know	29	9	20	-
	4%	2%	5%	-
				**
Sigma	793	389	403	1
	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

- Column Means:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

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137_1. Please rate the extent to which you agree or disagree with each statement, as it relates to your financial advisor. - I feel better about my financial situation, thanks to my financial advisor

	Total	Age			
		Gen Z	Millennial	Gen X	Boomer
		K	L	M	N
Base: All Answering (unwtd)	842	108	306	209	219
Base: All Answering (wtd)	793	84	221	210	278
Top 2 Box (Net)	629	72	174	152	231
	79%	87%	79%	72%	83%
		M*			M
Strongly agree	203	31	58	42	71
	26%	37%	26%	20%	25%
		M*			
Somewhat agree	426	41	116	109	161
	54%	49%	52%	52%	58%
		*			
Bottom 2 Box (Net)	134	10	41	44	39
	17%	12%	19%	21%	14%
		*			
Somewhat disagree	114	7	36	38	33
	14%	8%	16%	18%	12%
		*		K	
Strongly disagree	20	4	5	6	6
	3%	4%	2%	3%	2%
		*			
Don't Know	29	1	6	15	7
	4%	1%	3%	7%	3%
		*			
Sigma	793	84	221	210	278
	100%	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

- Column Means:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

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137_2. Please rate the extent to which you agree or disagree with each statement, as it relates to your financial advisor. - My financial advisor offers good financial advice

	Total	Gender		
		Male	Female	Other/Prefer not to answer
		A	B	C
Base: All Answering (unwtd)	842	415	425	2
Base: All Answering (wtd)	793	389	403	1
Top 2 Box (Net)	697	352	344	1
	88%	90%	85%	100%
				**
Strongly agree	270	127	143	-
	34%	33%	35%	-
				**
Somewhat agree	427	225	201	1
	54%	58%	50%	100%
				**
Bottom 2 Box (Net)	73	33	40	-
	9%	8%	10%	-
				**
Somewhat disagree	61	29	33	-
	8%	7%	8%	-
				**
Strongly disagree	12	4	8	-
	1%	1%	2%	-
				**
Don't Know	23	5	18	-
	3%	1%	5%	-
			A	**
Sigma	793	389	403	1
	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

- Column Means:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

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137_2. Please rate the extent to which you agree or disagree with each statement, as it relates to your financial advisor. - My financial advisor offers good financial advice

	Total	Age			
		Gen Z	Millennial	Gen X	Boomer
		K	L	M	N
Base: All Answering (unwtd)	842	108	306	209	219
Base: All Answering (wtd)	793	84	221	210	278
Top 2 Box (Net)	697	68	187	179	262
	88%	81%	84%	85%	94%
		*			KLM
Strongly agree	270	33	71	60	106
	34%	39%	32%	29%	38%
		*			
Somewhat agree	427	35	116	119	157
	54%	42%	52%	57%	56%
		*		K	K
Bottom 2 Box (Net)	73	13	30	20	10
	9%	15%	14%	10%	4%
		N*	N	N	
Somewhat disagree	61	9	27	16	9
	8%	11%	12%	7%	3%
		N*	N		
Strongly disagree	12	3	3	4	1
	1%	4%	1%	2%	*
		N*			
Don't Know	23	3	4	11	5
	3%	3%	2%	5%	2%
		*			
Sigma	793	84	221	210	278
	100%	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

- Column Means:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

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137_3. Please rate the extent to which you agree or disagree with each statement, as it relates to your financial advisor. - My financial advisor has changed my mindset, as it relates to financial planning

	Total	Gender		
		Male	Female	Other/Prefer not to answer
		A	B	C
Base: All Answering (unwtd)	842	415	425	2
Base: All Answering (wtd)	793	389	403	1
Top 2 Box (Net)	553	295	257	1
	70%	76%	64%	100%
		B		**
Strongly agree	143	61	82	*
	18%	16%	20%	42%
				**
Somewhat agree	410	234	175	1
	52%	60%	44%	58%
		B		**
Bottom 2 Box (Net)	202	82	120	-
	25%	21%	30%	-
			A	**
Somewhat disagree	161	71	90	-
	20%	18%	22%	-
				**
Strongly disagree	41	11	30	-
	5%	3%	7%	-
			A	**
Don't Know	38	12	26	-
	5%	3%	6%	-
				**
Sigma	793	389	403	1
	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

- Column Means:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

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137_3. Please rate the extent to which you agree or disagree with each statement, as it relates to your financial advisor. - My financial advisor has changed my mindset, as it relates to financial planning

	Total	Age			
		Gen Z	Millennial	Gen X	Boomer
		K	L	M	N
Base: All Answering (unwtd)	842	108	306	209	219
Base: All Answering (wtd)	793	84	221	210	278
Top 2 Box (Net)	553	69	164	130	191
	70%	82%	74%	62%	69%
		MN*	M		
Strongly agree	143	27	50	39	27
	18%	32%	23%	19%	10%
		MN*	N	N	
Somewhat agree	410	42	113	91	164
	52%	50%	51%	43%	59%
		*			M
Bottom 2 Box (Net)	202	13	49	68	72
	25%	16%	22%	33%	26%
		*		KL	
Somewhat disagree	161	7	44	55	54
	20%	9%	20%	26%	19%
		*	K	K	K
Strongly disagree	41	6	4	13	18
	5%	7%	2%	6%	6%
		L*		L	L
Don't Know	38	2	9	12	15
	5%	3%	4%	6%	5%
		*			
Sigma	793	84	221	210	278
	100%	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

- Column Means:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

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137_4. Please rate the extent to which you agree or disagree with each statement, as it relates to your financial advisor. - I'm better off financially than I was before I retained the services of my financial

	Total	Gender		
		Male	Female	Other/Prefer not to answer
		A	B	C
Base: All Answering (unwtd)	842	415	425	2
Base: All Answering (wtd)	793	389	403	1
Top 2 Box (Net)	539	275	263	1
	68%	71%	65%	58%
				**
Strongly agree	178	89	90	-
	22%	23%	22%	-
				**
Somewhat agree	360	186	174	1
	45%	48%	43%	58%
				**
Bottom 2 Box (Net)	213	93	120	*
	27%	24%	30%	42%
				**
Somewhat disagree	180	82	98	*
	23%	21%	24%	42%
				**
Strongly disagree	32	11	21	-
	4%	3%	5%	-
				**
Don't Know	42	22	20	-
	5%	6%	5%	-
				**
Sigma	793	389	403	1
	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

- Column Means:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

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137_4. Please rate the extent to which you agree or disagree with each statement, as it relates to your financial advisor. - I'm better off financially than I was before I retained the services of my financial advisor

	Total	Age			
		Gen Z	Millennial	Gen X	Boomer
		K	L	M	N
Base: All Answering (unwtd)	842	108	306	209	219
Base: All Answering (wtd)	793	84	221	210	278
Top 2 Box (Net)	539	59	156	135	188
	68%	71%	71%	64%	68%
		*			
Strongly agree	178	27	50	35	66
	22%	32%	23%	17%	24%
		M*			
Somewhat agree	360	32	106	100	121
	45%	38%	48%	48%	44%
		*			
Bottom 2 Box (Net)	213	22	57	63	71
	27%	26%	26%	30%	26%
		*			
Somewhat disagree	180	17	51	54	58
	23%	21%	23%	26%	21%
		*			
Strongly disagree	32	5	6	8	13
	4%	6%	3%	4%	5%
		*			
Don't Know	42	2	8	12	19
	5%	3%	4%	6%	7%
		*			
Sigma	793	84	221	210	278
	100%	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

- Column Means:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

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137_5. Please rate the extent to which you agree or disagree with each statement, as it relates to your financial advisor. - My financial advisor turns my financial negatives into financial positives

	Total	Gender		
		Male	Female	Other/Prefer not to answer
		A	B	C
Base: All Answering (unwtd)	842	415	425	2
Base: All Answering (wtd)	793	389	403	1
Top 2 Box (Net)	568	292	276	-
	72%	75%	69%	-
				**
Strongly agree	131	60	71	-
	17%	15%	18%	-
				**
Somewhat agree	437	232	205	-
	55%	60%	51%	-
		B		**
Bottom 2 Box (Net)	165	73	91	1
	21%	19%	23%	100%
				**
Somewhat disagree	134	65	68	1
	17%	17%	17%	100%
				**
Strongly disagree	31	8	23	-
	4%	2%	6%	-
			A	**
Don't Know	59	24	35	-
	7%	6%	9%	-
				**
Sigma	793	389	403	1
	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

- Column Means:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

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137_5. Please rate the extent to which you agree or disagree with each statement, as it relates to your financial advisor. - My financial advisor turns my financial negatives into financial positives

	Total	Age			
		Gen Z	Millennial	Gen X	Boomer
		K	L	M	N
Base: All Answering (unwtd)	842	108	306	209	219
Base: All Answering (wtd)	793	84	221	210	278
Top 2 Box (Net)	568	75	163	140	191
	72%	90%	73%	67%	69%
		LMN*			
Strongly agree	131	25	50	27	29
	17%	30%	22%	13%	11%
		MN*	MN		
Somewhat agree	437	50	113	113	161
	55%	60%	51%	54%	58%
		*			
Bottom 2 Box (Net)	165	8	47	55	55
	21%	10%	21%	26%	20%
		*	K	K	
Somewhat disagree	134	5	40	45	45
	17%	6%	18%	21%	16%
		*	K	K	K
Strongly disagree	31	3	7	11	11
	4%	4%	3%	5%	4%
		*			
Don't Know	59	1	12	15	32
	7%	1%	6%	7%	12%
		*		K	KL
Sigma	793	84	221	210	278
	100%	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

- Column Means:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

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137_6. Please rate the extent to which you agree or disagree with each statement, as it relates to your financial advisor. - My mental health has improved, thanks to the work my financial advisor has done with

	Total	Gender		
		Male	Female	Other/Prefer not to answer
		A	B	C
Base: All Answering (unwtd)	842	415	425	2
Base: All Answering (wtd)	793	389	403	1
Top 2 Box (Net)	464	232	231	1
	59%	60%	57%	100%
				**
Strongly agree	136	71	66	-
	17%	18%	16%	-
				**
Somewhat agree	328	162	165	1
	41%	42%	41%	100%
				**
Bottom 2 Box (Net)	241	117	124	-
	30%	30%	31%	-
				**
Somewhat disagree	166	78	89	-
	21%	20%	22%	-
				**
Strongly disagree	75	40	35	-
	9%	10%	9%	-
				**
Don't Know	88	40	48	-
	11%	10%	12%	-
				**
Sigma	793	389	403	1
	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

- Column Means:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

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137_6. Please rate the extent to which you agree or disagree with each statement, as it relates to your financial advisor. - My mental health has improved, thanks to the work my financial advisor has done with my finances

	Total	Age			
		Gen Z	Millennial	Gen X	Boomer
		K	L	M	N
Base: All Answering (unwtd)	842	108	306	209	219
Base: All Answering (wtd)	793	84	221	210	278
Top 2 Box (Net)	464	64	146	112	142
	59%	77%	66%	53%	51%
		MN*	MN		
Strongly agree	136	28	43	35	29
	17%	34%	20%	17%	11%
		LMN*	N		
Somewhat agree	328	36	103	77	112
	41%	43%	47%	36%	40%
		*			
Bottom 2 Box (Net)	241	16	60	73	93
	30%	19%	27%	35%	33%
		*		K	K
Somewhat disagree	166	10	47	49	61
	21%	12%	21%	23%	22%
		*		K	
Strongly disagree	75	6	13	24	32
	9%	7%	6%	12%	11%
		*			
Don't Know	88	3	16	25	44
	11%	4%	7%	12%	16%
		*		K	KL
Sigma	793	84	221	210	278
	100%	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

- Column Means:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

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137_7. Please rate the extent to which you agree or disagree with each statement, as it relates to your financial advisor. - If it wasn't for my financial advisor I would have no financial plan

	Total	Gender		
		Male	Female	Other/Prefer not to answer
		A	B	C
Base: All Answering (unwtd)	440	240	199	1
Base: All Answering (wtd)	407	214	192	1
Top 2 Box (Net)	247 61%	134 63%	113 59%	- - **
Strongly agree	91 22%	51 24%	40 21%	- - **
Somewhat agree	156 38%	83 39%	73 38%	- - **
Bottom 2 Box (Net)	154 38%	78 37%	75 39%	1 100% **
Somewhat disagree	102 25%	58 27%	43 22%	1 100% **
Strongly disagree	52 13%	20 9%	32 17%	- - **
Don't Know	5 1%	1 1%	4 2%	- - **
Sigma	407 100%	214 100%	192 100%	1 100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

- Column Means:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

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137_7. Please rate the extent to which you agree or disagree with each statement, as it relates to your financial advisor. - If it wasn't for my financial advisor I would have no financial plan

	Total	Age			
		Gen Z	Millennial	Gen X	Boomer
		K	L	M	N
Base: All Answering (unwtd)	440	67	167	91	115
Base: All Answering (wtd)	407	54	122	93	138
Top 2 Box (Net)	247	42	88	54	63
	61%	77%	72%	58%	46%
		MN*	N	*	*
Strongly agree	91	13	36	17	25
	22%	24%	29%	19%	18%
		*		*	*
Somewhat agree	156	29	52	37	39
	38%	53%	43%	40%	28%
		N*	N	*	*
Bottom 2 Box (Net)	154	12	33	38	71
	38%	22%	27%	41%	51%
		*		K*	KL*
Somewhat disagree	102	7	28	26	40
	25%	13%	23%	28%	29%
		*		*	*
Strongly disagree	52	4	5	12	31
	13%	8%	4%	13%	22%
		*		L*	L*
Don't Know	5	1	1	1	4
	1%	1%	1%	1%	3%
		*		*	*
Sigma	407	54	122	93	138
	100%	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

- Column Means:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

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137. Please rate the extent to which you agree or disagree with each statement, as it relates to your financial advisor. - Top 2 Box Summary

	Total	Gender		
		Male	Female	Other/Prefer not to answer
		A	B	C
I feel better about my financial situation, thanks to my financial advisor	629	321	308	*
	79%	83%	76%	42%
				**
My financial advisor offers good financial advice	697	352	344	1
	88%	90%	85%	100%
				**
My financial advisor has changed my mindset, as it relates to financial planning	553	295	257	1
	70%	76%	64%	100%
		B		**
I'm better off financially than I was before I retained the services of my financial advisor	539	275	263	1
	68%	71%	65%	58%
				**
My financial advisor turns my financial negatives into financial positives	568	292	276	-
	72%	75%	69%	-
				**
My mental health has improved, thanks to the work my financial advisor has done with my finances	464	232	231	1
	59%	60%	57%	100%
				**
If it wasn't for my financial advisor I would have no financial plan	247	134	113	-
	61%	63%	59%	-
				**

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

- Column Means:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

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137. Please rate the extent to which you agree or disagree with each statement, as it relates to your financial advisor. -
Top 2 Box Summary

	Total	Age			
		Gen Z	Millennial	Gen X	Boomer
		K	L	M	N
I feel better about my financial situation, thanks to my financial advisor	629	72	174	152	231
	79%	87%	79%	72%	83%
		M*			M
My financial advisor offers good financial advice	697	68	187	179	262
	88%	81%	84%	85%	94%
		*			KLM
My financial advisor has changed my mindset, as it relates to financial planning	553	69	164	130	191
	70%	82%	74%	62%	69%
		MN*	M		
I'm better off financially than I was before I retained the services of my financial advisor	539	59	156	135	188
	68%	71%	71%	64%	68%
		*			
My financial advisor turns my financial negatives into financial positives	568	75	163	140	191
	72%	90%	73%	67%	69%
		LMN*			
My mental health has improved, thanks to the work my financial advisor has done with my finances	464	64	146	112	142
	59%	77%	66%	53%	51%
		MN*	MN		
If it wasn't for my financial advisor I would have no financial plan	247	42	88	54	63
	61%	77%	72%	58%	46%
		MN*	N	*	*

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

- Column Means:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

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137. Please rate the extent to which you agree or disagree with each statement, as it relates to your financial advisor. - Bottom 2 Box Summary

	Total	Gender		
		Male	Female	Other/Prefer not to answer
		A	B	C
I feel better about my financial situation, thanks to my financial advisor	134	59	75	1
	17%	15%	19%	58%
				**
My financial advisor offers good financial advice	73	33	40	-
	9%	8%	10%	-
				**
My financial advisor has changed my mindset, as it relates to financial planning	202	82	120	-
	25%	21%	30%	-
			A	**
I'm better off financially than I was before I retained the services of my financial advisor	213	93	120	*
	27%	24%	30%	42%
				**
My financial advisor turns my financial negatives into financial positives	165	73	91	1
	21%	19%	23%	100%
				**
My mental health has improved, thanks to the work my financial advisor has done with my finances	241	117	124	-
	30%	30%	31%	-
				**
If it wasn't for my financial advisor I would have no financial plan	154	78	75	1
	38%	37%	39%	100%
				**

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

- Column Means:

Columns Tested (5%): A/B/C,D/E/F,G/H/I/J,K/L/M/N,O/P,Q/R/S

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

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137. Please rate the extent to which you agree or disagree with each statement, as it relates to your financial advisor. - Bottom 2 Box Summary

	Total	Age			
		Gen Z	Millennial	Gen X	Boomer
		K	L	M	N
I feel better about my financial situation, thanks to my financial advisor	134	10	41	44	39
	17%	12%	19%	21%	14%
		*			
My financial advisor offers good financial advice	73	13	30	20	10
	9%	15%	14%	10%	4%
		N*	N	N	
My financial advisor has changed my mindset, as it relates to financial planning	202	13	49	68	72
	25%	16%	22%	33%	26%
		*		KL	
I'm better off financially than I was before I retained the services of my financial advisor	213	22	57	63	71
	27%	26%	26%	30%	26%
		*			
My financial advisor turns my financial negatives into financial positives	165	8	47	55	55
	21%	10%	21%	26%	20%
		*	K	K	
My mental health has improved, thanks to the work my financial advisor has done with my finances	241	16	60	73	93
	30%	19%	27%	35%	33%
		*		K	K
If it wasn't for my financial advisor I would have no financial plan	154	12	33	38	71
	38%	22%	27%	41%	51%
		*		K*	KL*

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

- Column Means:

Columns Tested (5%): A/B/C/D/E/F,G/H/I/J,K/L/M/N,O/P

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

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