

Q1a. Overall, would you consider yourself to be great, fair, poor or terrible at tax planning?

		Tax Planning		Filing Taxes		Interested in Tax Planning		Need to Start Investing for Retirement		Income			
	Total	Good/ fair	Poor/ terrible	Good/ fair	Poor/ terrible	Yes/ probably	Probably not/ no	Yes	No	<\$30k	\$30k - <\$60k	\$60k - <\$100k	\$100k+
Base: All respondents	503	A	B	C	D	E	F	G	H	I	J	K	L
		346	157	357	146	402	101	382	121	104	152	140	107
Great	42 8.3%	42 12.1%	0 -	41 11.5%	1 0.7%	35 8.7%	7 6.9%	34 8.9%	8 6.6%	10 9.6%	7 4.6%	11 7.9%	14 13.1%
Fair	304 60.4%	B 304 87.9%	D 0 -	D 257 72.0%	47 32.2%	253 62.9%	51 50.5%	242 63.4%	62 51.2%	58 55.8%	95 62.5%	87 62.1%	64 59.8%
Poor	124 24.7%	B 0 -	124 79.0%	D 55 15.4%	69 47.3%	F 94 23.4%	30 29.7%	H 86 22.5%	38 31.4%	27 26.0%	41 27.0%	33 23.6%	23 21.5%
Terrible	33 6.6%	A 0 -	A 33 21.0%	C 4 1.1%	C 29 19.9%	20 5.0%	13 12.9%	G 20 5.2%	13 10.7%	9 8.7%	9 5.9%	9 6.4%	6 5.6%
Summary													
Top2Box	346 68.8%	346 100.0%	0 -	298 83.5%	48 32.9%	288 71.6%	58 57.4%	276 72.3%	70 57.9%	68 65.4%	102 67.1%	98 70.0%	78 72.9%
Low2Box	157 31.2%	B 0 -	157 100.0%	D 59 16.5%	98 67.1%	F 114 28.4%	43 42.6%	H 106 27.7%	51 42.1%	36 34.6%	50 32.9%	42 30.0%	29 27.1%
			A		C		E		G				

Proportions/Mean: Columns Tested (5% risk level) - A/B - C/D - E/F - G/H - I/J/K/L

Q2. Would you be interested in learning more about the tax saving strategies available to you as a young professional?

		Tax Planning		Filing Taxes		Interested in Tax Planning		Need to Start Investing for Retirement		Income			
	Total	Good/ fair	Poor/ terrible	Good/ fair	Poor/ terrible	Yes/ probably	Probably not/ no	Yes	No	<\$30k	\$30k - <\$60k	\$60k - <\$100k	\$100k+
Base: All respondents	503	A	B	C	D	E	F	G	H	I	J	K	L
		346	157	357	146	402	101	382	121	104	152	140	107
Yes, it is very important to me	169 33.6%	132 38.2%	37 23.6%	135 37.8%	34 23.3%	169 42.0%	0 -	150 39.3%	19 15.7%	40 38.5%	39 25.7%	44 31.4%	46 43.0%
		B		D		F		H		J			J
Probably, it is somewhat important to me	233 46.3%	156 45.1%	77 49.0%	163 45.7%	70 47.9%	233 58.0%	0 -	178 46.6%	55 45.5%	49 47.1%	79 52.0%	65 46.4%	40 37.4%
						F				L			
Probably not, it is not very important to me	67 13.3%	40 11.6%	27 17.2%	39 10.9%	28 19.2%	0 -	67 66.3%	40 10.5%	27 22.3%	10 9.6%	21 13.8%	22 15.7%	14 13.1%
					C		E		G				
I can't be bothered, it is not important to me at all	34 6.8%	18 5.2%	16 10.2%	20 5.6%	14 9.6%	0 -	34 33.7%	14 3.7%	20 16.5%	5 4.8%	13 8.6%	9 6.4%	7 6.5%
			A				E		G				
Summary													
Top2Box	402 79.9%	288 83.2%	114 72.6%	298 83.5%	104 71.2%	402 100.0%	0 -	328 85.9%	74 61.2%	89 85.6%	118 77.6%	109 77.9%	86 80.4%
		B		D		F		H					
Low2Box	101 20.1%	58 16.8%	43 27.4%	59 16.5%	42 28.8%	0 -	101 100.0%	54 14.1%	47 38.8%	15 14.4%	34 22.4%	31 22.1%	21 19.6%
			A		C		E		G				

Proportions/Mean: Columns Tested (5% risk level) - A/B - C/D - E/F - G/H - I/J/K/L

Q3. Even though retirement seems far off, given the growth benefits of investing early, do you feel the need to start investing today for your retirement?

	Total	Tax Planning		Filing Taxes		Interested in Tax Planning		Need to Start Investing for Retirement		Income			
		Good/ fair	Poor/ terrible	Good/ fair	Poor/ terrible	Yes/ probably	Probably not/ no	Yes	No	<\$30k	\$30k - <\$60k	\$60k - <\$100k	\$100k+
		A	B	C	D	E	F	G	H	I	J	K	L
Base: All respondents	503	346	157	357	146	402	101	382	121	104	152	140	107
Yes	382	276	106	280	102	328	54	382	0	79	103	108	92
	75.9%	79.8%	67.5%	78.4%	69.9%	81.6%	53.5%	100.0%	-	76.0%	67.8%	77.1%	86.0%
No		B		D		F		H					J
	121	70	51	77	44	74	47	0	121	25	49	32	15
	24.1%	20.2%	32.5%	21.6%	30.1%	18.4%	46.5%	-	100.0%	24.0%	32.2%	22.9%	14.0%
		A		C		E		G		L			

Proportions/Mean: Columns Tested (5% risk level) - A/B - C/D - E/F - G/H - I/J/K/L

Q4. Why do you say you do not feel the need to start investing today?

		Tax Planning		Filing Taxes		Interested in Tax Planning		Need to Start Investing for Retirement		Income			
	Total	Good/ fair	Poor/ terrible	Good/ fair	Poor/ terrible	Yes/ probably	Probably not/ no	Yes	No	<\$30k	\$30k - <\$60k	\$60k - <\$100k	\$100k+
		A	B	C	D	E	F	G	H	I	J	K	L
Base: Respondents who do not feel the need to start investing today for retirement	121	70*	51*	77*	44*	74*	47*	-**	121	25**	49*	32*	15**
I would like to but I can't, given my current economic situation	64 52.9%	36 51.4%	28 54.9%	40 51.9%	24 54.5%	45 60.8% F	19 40.4%	0 -	64 52.9%	13 52.0%	30 61.2%	17 53.1%	4 26.7%
I don't understand the benefits and importance of investing early	12 9.9%	7 10.0%	5 9.8%	8 10.4%	4 9.1%	8 10.8%	4 8.5%	0 -	12 9.9%	2 8.0%	6 12.2%	2 6.3%	2 13.3%
I don't feel I need to focus on retirement planning right now	45 37.2%	24 34.3%	21 41.2%	29 37.7%	16 36.4%	25 33.8%	20 42.6%	0 -	45 37.2%	7 28.0%	18 36.7%	14 43.8%	6 40.0%
I don't see any need to start investing	19 15.7%	12 17.1%	7 13.7%	13 16.9%	6 13.6%	6 8.1%	13 27.7% E	0 -	19 15.7%	5 20.0%	7 14.3%	4 12.5%	3 20.0%

Proportions/Mean: Columns Tested (5% risk level) - A/B - C/D - E/F - G/H - I/J/K/L * small base; ** very small base (under 30) ineligible for sig testing