

STUDY:

The War on Stress 2019

Investor Tables

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Financial Outlook, Goals and Understanding

Today, to what extent do you feel financially secure?	Very insecure	12%	9%	8%	19%	34%	11%	1%	5%	6%	20%	22%	13%	12%	4%	12%	13%
	Somewhat insecure	17%	9%	13%	28%	29%	20%	15%	15%	9%	24%	22%	21%	10%	14%	16%	18%
	Neutral	12%	6%	17%	14%	11%	20%	14%	5%	7%	17%	16%	13%	10%	6%	11%	12%
	Somewhat secure	39%	44%	40%	32%	22%	34%	52%	48%	43%	30%	35%	50%	41%	40%	37%	46%
	Very secure	21%	33%	22%	7%	3%	14%	18%	28%	35%	10%	3%	4%	26%	36%	23%	12%
	I'm not sure	1%	0%	1%	1%	1%	0%	0%	0%	0%	0%	0%	3%	0%	0%	0%	1%
Which of the following best describes how you think about your financial goals? Please select one response.	I'm not at all clear on my financial goals; I don't have a picture of where I want to be	3%	1%	3%	6%	9%	3%	0%	0%	0%	3%	14%	0%	4%	0%	2%	7%
	I have a general idea of my financial goals; I still need some clarification	41%	26%	48%	50%	55%	51%	39%	43%	25%	52%	51%	52%	32%	29%	39%	46%
	I'm very clear on my financial goals; I know exactly where I want to be	56%	73%	48%	44%	36%	46%	61%	58%	75%	45%	35%	48%	63%	71%	59%	47%
How would you describe your level of financial planning or investing knowledge?	1 Not at all knowledgeable	3%	2%	2%	5%	9%	3%	0%	0%	1%	4%	8%	2%	4%	1%	2%	7%
	2	10%	4%	10%	18%	24%	17%	9%	5%	1%	18%	22%	10%	10%	2%	9%	15%
	3	35%	28%	43%	36%	41%	29%	46%	28%	19%	42%	24%	50%	29%	30%	33%	44%
	4	38%	42%	41%	32%	22%	31%	42%	53%	50%	27%	38%	27%	38%	52%	43%	24%
	5 Very Knowledgeable	13%	23%	4%	8%	4%	20%	4%	15%	28%	8%	8%	10%	18%	15%	13%	10%

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
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Financial Outlook, Goals and Understanding

How would you rate your interest in understanding financial planning or investments?	Not at all interested	1%	3%	0%	0%	1%	0%	0%	5%	1%	0%	0%	0%	1%	2%	1%	1%
	Not very interested	1%	1%	0%	1%	0%	3%	0%	0%	0%	1%	0%	0%	0%	1%	1%	0%
	Neutral	6%	6%	10%	3%	3%	9%	5%	13%	3%	1%	3%	8%	4%	9%	6%	3%
	Somewhat interested	22%	18%	28%	21%	16%	20%	27%	20%	22%	17%	16%	19%	28%	24%	22%	21%
	Very interested	71%	73%	62%	75%	80%	69%	68%	63%	74%	80%	81%	73%	66%	65%	70%	75%
Do you have a written financial plan?	Yes	35%	47%	32%	25%	11%	31%	32%	53%	54%	13%	28%	28%	44%	49%	34%	38%
	No	65%	53%	68%	75%	89%	69%	68%	48%	46%	87%	72%	72%	56%	51%	66%	62%
Was that written financial plan provided by a financial advisor?	Yes	32%	34%	24%	36%	0%	0%	24%	48%	40%	0%	10%	31%	52%	33%	32%	32%
	No	66%	64%	72%	64%	88%	100%	76%	52%	60%	89%	90%	69%	48%	67%	67%	68%
	Don't recall	2%	2%	3%	0%	13%	0%	0%	0%	0%	11%	0%	0%	0%	0%	1%	0%

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Satisfaction and Concerns with Different Aspects of Life

How satisfied are you right now with each of these aspects of your life?

Personal health	Very dissatisfied	5%	2%	2%	10%	9%	3%	4%	3%	4%	8%	0%	4%	6%	5%	5%	4%
	Somewhat dissatisfied	16%	4%	12%	31%	22%	26%	11%	18%	7%	18%	22%	25%	9%	14%	16%	13%
	Neutral	12%	8%	16%	13%	14%	20%	13%	8%	10%	17%	19%	13%	9%	7%	11%	16%
	Somewhat satisfied	41%	45%	44%	35%	33%	29%	46%	50%	41%	35%	43%	33%	43%	45%	43%	35%
	Very satisfied	26%	41%	26%	11%	21%	23%	27%	23%	37%	21%	16%	25%	34%	29%	25%	31%
Health of family/friends	Very dissatisfied	5%	4%	1%	9%	9%	0%	4%	5%	3%	6%	8%	0%	7%	5%	4%	7%
	Somewhat dissatisfied	14%	7%	13%	22%	16%	17%	11%	18%	7%	15%	24%	13%	9%	14%	11%	22%
	Neutral	14%	6%	18%	19%	13%	23%	15%	10%	6%	13%	16%	21%	15%	10%	15%	12%
	Somewhat satisfied	37%	38%	43%	32%	36%	26%	41%	35%	51%	37%	35%	35%	38%	39%	40%	28%
	Very satisfied	30%	46%	25%	17%	26%	34%	29%	33%	32%	30%	16%	31%	31%	32%	30%	31%

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All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Satisfaction and Concerns with Different Aspects of Life

How satisfied are you right now with each of these aspects of your life?

Personal financial situation today	Very dissatisfied	10%	4%	6%	20%	30%	6%	6%	0%	3%	17%	30%	10%	7%	2%	8%	18%
	Somewhat dissatisfied	13%	2%	11%	26%	20%	17%	14%	18%	4%	15%	22%	17%	15%	7%	12%	18%
	Neutral	13%	8%	19%	14%	22%	26%	10%	10%	4%	28%	11%	13%	4%	8%	14%	7%
	Somewhat satisfied	40%	45%	45%	32%	24%	37%	46%	43%	47%	30%	32%	42%	49%	45%	41%	40%
	Very satisfied	23%	41%	18%	8%	4%	14%	24%	30%	41%	10%	5%	19%	25%	38%	25%	18%
Strength of family relationships	Very dissatisfied	4%	2%	2%	8%	7%	9%	3%	3%	3%	4%	5%	6%	4%	3%	3%	6%
	Somewhat dissatisfied	10%	7%	5%	17%	12%	14%	11%	5%	6%	10%	19%	10%	13%	6%	9%	15%
	Neutral	14%	6%	17%	19%	14%	11%	13%	13%	13%	18%	19%	13%	9%	12%	14%	10%
	Somewhat satisfied	33%	31%	34%	33%	22%	26%	43%	30%	38%	25%	24%	38%	29%	41%	32%	38%
	Very satisfied	39%	54%	41%	23%	45%	40%	30%	50%	40%	42%	32%	33%	44%	38%	41%	31%

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	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Satisfaction and Concerns with Different Aspects of Life

How satisfied are you right now with each of these aspects of your life?

Career progression	Satisfaction Level	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender		
		Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female	
	Very dissatisfied	10%	4%	1%	25%	17%	11%	6%	8%	10%	14%	14%	23%	9%	3%	10%	12%
	Somewhat dissatisfied	13%	4%	17%	18%	21%	17%	11%	13%	4%	20%	16%	17%	12%	5%	11%	21%
	Neutral	25%	21%	30%	25%	24%	29%	25%	25%	22%	23%	19%	10%	24%	35%	26%	21%
	Somewhat satisfied	27%	30%	24%	27%	28%	29%	34%	20%	21%	30%	46%	35%	29%	14%	27%	26%
	Very satisfied	25%	42%	28%	6%	11%	14%	23%	35%	43%	14%	5%	15%	26%	43%	26%	21%

To what degree are you concerned with: Maintaining sufficient assets to meet lifetime income needs?

Maintaining sufficient assets to meet lifetime income needs	Degree of Concern	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender		
		Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female	
	Not at all concerned	8%	20%	2%	1%	5%	0%	8%	8%	21%	4%	0%	4%	7%	17%	9%	4%
	Not very concerned	13%	23%	11%	4%	3%	9%	11%	25%	21%	6%	3%	6%	18%	23%	14%	12%
	Neutral	13%	14%	14%	10%	12%	14%	18%	10%	10%	20%	11%	13%	4%	13%	13%	10%
	Somewhat concerned	31%	21%	42%	32%	28%	40%	30%	33%	25%	25%	32%	38%	34%	28%	32%	26%
	Very concerned	35%	22%	31%	53%	53%	37%	33%	25%	24%	45%	54%	40%	37%	20%	33%	47%

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To what degree are you concerned with:

Dealing with the rising costs of health/ long-term care	Not at all concerned	8%	14%	4%	4%	11%	9%	8%	0%	12%	11%	5%	4%	7%	10%	9%	4%
	Not very concerned	12%	15%	16%	6%	12%	11%	10%	15%	18%	17%	5%	4%	9%	18%	13%	10%
	Neutral	13%	13%	16%	12%	18%	20%	13%	5%	10%	21%	19%	8%	12%	9%	14%	10%
	Somewhat concerned	38%	33%	46%	38%	28%	23%	34%	58%	47%	20%	43%	46%	35%	46%	39%	37%
	Very concerned	28%	25%	17%	40%	32%	37%	35%	23%	13%	31%	27%	38%	37%	18%	25%	38%
Leaving a financial legacy for children	Not at all concerned	29%	35%	26%	24%	34%	29%	29%	25%	28%	30%	27%	29%	35%	25%	28%	32%
	Not very concerned	16%	21%	17%	11%	9%	11%	22%	28%	21%	17%	8%	6%	19%	23%	16%	18%
	Neutral	17%	18%	19%	14%	13%	14%	15%	20%	19%	15%	19%	13%	15%	20%	18%	10%
	Somewhat concerned	21%	18%	23%	23%	13%	26%	22%	25%	19%	11%	19%	29%	22%	24%	21%	19%
	Very concerned	17%	8%	15%	29%	30%	20%	13%	3%	13%	27%	27%	23%	9%	10%	16%	21%

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	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

To what degree are you concerned with:

Leaving a financial legacy for a charity	Not at all concerned	37%	43%	32%	35%	38%	34%	42%	38%	43%	38%	30%	33%	35%	43%	36%	41%
	Not very concerned	20%	22%	22%	18%	12%	17%	25%	35%	21%	14%	22%	23%	21%	25%	21%	18%
	Neutral	24%	22%	29%	22%	16%	29%	19%	23%	22%	17%	22%	29%	25%	25%	23%	25%
	Somewhat concerned	13%	12%	9%	18%	20%	14%	13%	5%	7%	17%	16%	15%	16%	6%	14%	9%
	Very concerned	6%	2%	9%	8%	14%	6%	1%	0%	7%	14%	11%	0%	3%	2%	5%	7%
Coping with a significant market downturn	Not at all concerned	8%	17%	1%	5%	14%	9%	8%	3%	7%	15%	8%	6%	7%	6%	9%	4%
	Not very concerned	18%	29%	16%	9%	9%	23%	19%	35%	22%	17%	16%	23%	19%	18%	18%	21%
	Neutral	20%	18%	24%	19%	25%	20%	24%	15%	13%	17%	30%	21%	15%	20%	20%	19%
	Somewhat concerned	38%	30%	44%	41%	34%	37%	35%	38%	38%	35%	35%	27%	44%	41%	39%	34%
	Very concerned	16%	6%	15%	26%	17%	11%	14%	10%	19%	15%	11%	23%	15%	16%	14%	22%

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To what degree are you concerned with:

Ensuring a partner/ spouse is taken care of should you pass away first	Not at all concerned	26%	36%	19%	19%	25%	20%	29%	28%	28%	20%	14%	27%	31%	31%	24%	32%
	Not very concerned	18%	22%	19%	11%	17%	11%	16%	33%	21%	17%	14%	15%	16%	23%	19%	13%
	Neutral	19%	18%	22%	19%	24%	20%	10%	10%	22%	23%	24%	15%	15%	20%	20%	16%
	Somewhat concerned	20%	15%	22%	23%	12%	23%	24%	23%	18%	17%	22%	21%	18%	21%	20%	19%
	Very concerned	18%	8%	18%	28%	22%	26%	20%	8%	12%	24%	27%	23%	21%	6%	18%	19%
Keeping personal data safe	Not at all concerned	6%	13%	2%	3%	9%	9%	1%	3%	12%	11%	3%	0%	6%	8%	8%	0%
	Not very concerned	11%	19%	8%	5%	13%	9%	10%	15%	12%	14%	5%	2%	13%	14%	11%	13%
	Neutral	11%	7%	15%	13%	13%	17%	6%	18%	12%	14%	14%	15%	6%	11%	12%	6%
	Somewhat concerned	37%	36%	41%	34%	28%	31%	41%	43%	37%	25%	35%	42%	37%	40%	38%	34%
	Very concerned	35%	25%	34%	46%	37%	34%	42%	23%	28%	35%	43%	42%	38%	27%	32%	47%

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To what degree are you concerned with:

Communicating with a spouse/partner effectively about money	Not at all concerned	25%	36%	20%	17%	32%	14%	19%	40%	29%	23%	11%	23%	35%	25%	22%	37%
	Not very concerned	18%	21%	27%	8%	11%	9%	22%	20%	28%	15%	14%	6%	22%	25%	20%	13%
	Neutral	21%	15%	23%	25%	16%	26%	24%	13%	16%	13%	30%	27%	15%	23%	20%	21%
	Somewhat concerned	21%	18%	18%	27%	14%	34%	25%	23%	16%	20%	22%	25%	24%	20%	23%	16%
	Very concerned	15%	10%	12%	23%	28%	17%	10%	5%	10%	30%	24%	19%	4%	7%	15%	13%
Creating a meaningful vision for the next phase of life (e.g., in retirement)	Not at all concerned	15%	26%	12%	6%	8%	6%	18%	18%	28%	7%	3%	6%	16%	29%	17%	9%
	Not very concerned	14%	22%	13%	6%	9%	20%	13%	18%	19%	18%	8%	8%	9%	20%	16%	9%
	Neutral	20%	20%	28%	13%	16%	23%	24%	23%	7%	18%	19%	17%	18%	22%	20%	15%
	Somewhat concerned	27%	21%	31%	31%	28%	29%	24%	35%	29%	23%	35%	31%	32%	24%	28%	28%
	Very concerned	24%	10%	16%	44%	39%	23%	22%	8%	16%	34%	35%	38%	25%	6%	20%	40%

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To what degree are you concerned with:

Understanding investments or the markets	Not at all concerned	9%	17%	4%	3%	4%	9%	4%	8%	22%	4%	0%	6%	13%	12%	9%	7%
	Not very concerned	19%	35%	9%	9%	8%	11%	25%	38%	24%	8%	19%	17%	25%	24%	20%	18%
	Neutral	15%	8%	22%	18%	13%	20%	15%	13%	10%	18%	11%	6%	10%	22%	16%	9%
	Somewhat concerned	28%	21%	42%	25%	25%	34%	33%	33%	22%	24%	35%	29%	26%	28%	27%	32%
	Very concerned	29%	19%	24%	45%	50%	26%	23%	10%	22%	45%	35%	42%	25%	15%	28%	34%
Communicating about money with children	Not at all concerned	30%	38%	27%	24%	34%	29%	30%	38%	31%	34%	30%	25%	32%	27%	26%	46%
	Not very concerned	17%	22%	18%	11%	8%	11%	29%	13%	24%	8%	3%	19%	21%	27%	20%	10%
	Neutral	19%	17%	23%	19%	20%	17%	16%	18%	15%	23%	27%	10%	16%	20%	21%	13%
	Somewhat concerned	21%	16%	23%	24%	16%	29%	15%	30%	19%	13%	24%	23%	24%	22%	23%	10%
	Very concerned	13%	6%	10%	22%	22%	14%	9%	3%	12%	23%	16%	23%	7%	4%	11%	21%

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To what degree are you concerned with:

Helping my children make better financial decisions	Not at all concerned	26%	28%	24%	25%	30%	34%	23%	23%	26%	31%	24%	23%	28%	23%	24%	32%
	Not very concerned	13%	20%	11%	6%	13%	6%	16%	10%	16%	8%	19%	4%	16%	14%	13%	10%
	Neutral	19%	18%	22%	17%	21%	17%	16%	18%	16%	24%	11%	17%	7%	25%	20%	15%
	Somewhat concerned	24%	20%	27%	25%	8%	17%	32%	40%	22%	13%	16%	27%	35%	25%	25%	19%
	Very concerned	20%	14%	17%	28%	28%	26%	13%	10%	19%	24%	30%	29%	13%	14%	19%	24%
Caring for aging parents	Not at all concerned	38%	45%	37%	31%	20%	20%	48%	40%	59%	11%	5%	23%	47%	71%	39%	31%
	Not very concerned	11%	14%	9%	9%	14%	11%	8%	10%	10%	20%	5%	13%	13%	6%	11%	12%
	Neutral	14%	13%	16%	14%	22%	14%	14%	8%	9%	17%	24%	15%	7%	12%	15%	7%
	Somewhat concerned	21%	22%	25%	18%	18%	31%	22%	33%	13%	21%	35%	31%	24%	7%	19%	28%
	Very concerned	16%	6%	14%	29%	25%	23%	9%	10%	9%	31%	30%	19%	9%	5%	15%	22%

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

To what degree are you concerned with:

Personal health and wellness	Not at all concerned	7%	16%	3%	1%	7%	11%	6%	3%	12%	8%	0%	2%	10%	10%	7%	6%
	Not very concerned	17%	30%	13%	7%	11%	9%	23%	25%	21%	7%	30%	13%	19%	21%	19%	12%
	Neutral	12%	10%	15%	11%	8%	11%	11%	18%	13%	10%	11%	8%	13%	14%	11%	15%
	Somewhat concerned	32%	27%	46%	25%	26%	31%	35%	38%	28%	27%	22%	29%	28%	41%	33%	25%
	Very concerned	32%	16%	23%	57%	49%	37%	24%	18%	26%	48%	38%	48%	29%	15%	30%	43%
Creating a meaningful plan for how I will spend time after stopping full-time work	Not at all concerned	24%	38%	16%	14%	21%	11%	25%	25%	32%	21%	11%	15%	22%	35%	24%	22%
	Not very concerned	19%	25%	22%	12%	20%	23%	19%	18%	21%	27%	16%	17%	16%	21%	22%	10%
	Neutral	17%	14%	25%	14%	16%	20%	15%	18%	12%	14%	14%	23%	13%	21%	17%	18%
	Somewhat concerned	20%	14%	25%	24%	20%	26%	22%	33%	15%	20%	27%	19%	24%	14%	18%	25%
	Very concerned	20%	10%	13%	36%	24%	20%	19%	8%	21%	18%	32%	27%	25%	10%	19%	25%

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

To what degree are you concerned with:

Creating a plan to manage income in retirement	Not at all concerned	13%	26%	6%	5%	14%	9%	11%	13%	22%	15%	0%	6%	10%	23%	13%	13%
	Not very concerned	18%	26%	12%	16%	13%	14%	23%	23%	22%	21%	11%	13%	15%	26%	21%	12%
	Neutral	15%	12%	24%	11%	14%	14%	16%	18%	9%	13%	11%	15%	12%	20%	15%	13%
	Somewhat concerned	30%	22%	38%	33%	26%	40%	25%	38%	26%	25%	32%	33%	43%	21%	30%	29%
	Very concerned	23%	14%	20%	35%	32%	23%	24%	10%	21%	25%	46%	33%	21%	11%	21%	32%

Defining and Dealing with Stress

I am comfortable with the level of stress in my life right now	Strongly disagree	16%	3%	3%	40%	30%	11%	13%	10%	7%	24%	19%	25%	18%	6%	13%	28%
	Somewhat disagree	22%	9%	22%	36%	17%	37%	28%	23%	16%	23%	32%	25%	18%	22%	20%	29%
	Neutral	16%	11%	35%	7%	17%	11%	14%	20%	16%	15%	14%	10%	21%	15%	18%	9%
	Somewhat agree	29%	40%	35%	14%	25%	29%	25%	30%	37%	27%	22%	25%	28%	36%	32%	19%
	Strongly agree	16%	37%	4%	3%	11%	11%	20%	18%	24%	11%	14%	15%	16%	22%	17%	15%

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Defining and Dealing with Stress

I need to manage better or reduce the amount of negative stress in my life right now	Strongly disagree	13%	31%	2%	2%	9%	9%	11%	15%	24%	8%	8%	6%	16%	18%	13%	10%
	Somewhat disagree	10%	13%	12%	4%	4%	11%	9%	18%	15%	7%	5%	6%	10%	15%	11%	4%
	Neutral	24%	30%	34%	10%	17%	9%	25%	25%	25%	14%	11%	19%	26%	33%	26%	16%
	Somewhat agree	31%	22%	42%	32%	30%	57%	38%	28%	21%	37%	41%	35%	29%	25%	31%	31%
	Strongly agree	22%	4%	10%	52%	39%	14%	16%	15%	16%	34%	35%	33%	18%	9%	19%	38%
I am better able to manage stress than most of my peers	Strongly disagree	3%	2%	1%	5%	5%	0%	3%	0%	3%	3%	5%	2%	3%	2%	3%	1%
	Somewhat disagree	6%	2%	4%	13%	4%	14%	4%	5%	4%	3%	16%	6%	9%	4%	6%	7%
	Neutral	41%	29%	53%	45%	42%	40%	42%	38%	40%	41%	24%	42%	41%	44%	42%	35%
	Somewhat agree	32%	35%	30%	31%	29%	26%	38%	38%	32%	31%	38%	38%	29%	32%	31%	41%
	Strongly agree	18%	33%	12%	6%	20%	20%	14%	20%	21%	23%	16%	13%	18%	18%	18%	15%

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Defining and Dealing with Stress

I am better able to manage stress than most of my family and friends	Strongly disagree	3%	2%	0%	6%	5%	6%	0%	0%	1%	3%	8%	0%	3%	2%	2%	3%
	Somewhat disagree	7%	4%	6%	12%	9%	6%	10%	8%	4%	8%	19%	6%	7%	4%	7%	10%
	Neutral	33%	23%	43%	36%	32%	37%	33%	38%	34%	30%	24%	44%	32%	32%	33%	32%
	Somewhat agree	37%	38%	34%	37%	34%	31%	39%	33%	35%	38%	30%	27%	44%	38%	38%	35%
	Strongly agree	20%	33%	16%	8%	20%	20%	18%	23%	25%	21%	19%	23%	13%	24%	20%	19%
Reducing negative stress in my life would have a positive effect in my business life	Strongly disagree	7%	12%	6%	2%	3%	3%	9%	8%	10%	1%	3%	4%	4%	16%	7%	7%
	Somewhat disagree	4%	8%	2%	1%	3%	3%	5%	10%	3%	6%	0%	0%	4%	6%	3%	7%
	Neutral	29%	40%	33%	14%	14%	14%	32%	33%	44%	11%	16%	17%	34%	45%	30%	19%
	Somewhat agree	27%	22%	37%	25%	20%	43%	32%	30%	21%	24%	24%	44%	34%	18%	28%	24%
	Strongly agree	34%	18%	22%	59%	61%	37%	23%	20%	22%	58%	57%	35%	24%	16%	32%	43%

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Defining and Dealing with Stress

Reducing negative stress in my life would have a positive effect in my personal life	Strongly disagree	5%	10%	1%	2%	1%	6%	1%	10%	9%	1%	0%	4%	6%	9%	4%	6%
	Somewhat disagree	3%	6%	2%	1%	4%	3%	5%	0%	3%	6%	3%	0%	0%	5%	4%	0%
	Neutral	17%	26%	18%	7%	7%	20%	14%	20%	29%	7%	8%	15%	19%	26%	19%	9%
	Somewhat agree	32%	34%	43%	22%	30%	23%	39%	38%	32%	27%	27%	35%	34%	34%	34%	25%
	Strongly agree	43%	23%	35%	69%	58%	49%	41%	33%	26%	59%	62%	46%	41%	25%	39%	60%
How does the level of stress in your life compare to the level of stress in your life 12 months ago?	Lower	28%	38%	22%	24%	34%	34%	28%	20%	28%	35%	43%	35%	26%	16%	27%	31%
	About the same	49%	53%	62%	36%	34%	49%	51%	55%	60%	35%	27%	48%	50%	67%	53%	37%
	Higher	22%	10%	16%	41%	32%	17%	22%	25%	12%	30%	30%	17%	24%	18%	20%	32%
How does the level of stress in your life compare to the level of stress in your life 5 years ago?	Lower	43%	51%	47%	30%	34%	34%	46%	43%	54%	28%	43%	48%	47%	46%	43%	43%
	About the same	24%	24%	32%	16%	22%	17%	19%	30%	26%	15%	16%	19%	22%	32%	23%	19%
	Higher	34%	25%	20%	54%	43%	49%	35%	28%	19%	56%	41%	33%	31%	22%	34%	38%

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Defining and Dealing with Stress

How does negative stress impact the following areas of your life?

Your personal relationships	No impact	12%	22%	10%	3%	8%	17%	13%	13%	12%	8%	3%	8%	9%	19%	13%	4%
	Low impact	24%	38%	26%	7%	25%	11%	25%	33%	25%	20%	30%	15%	22%	30%	25%	19%
	Some impact	27%	21%	35%	28%	24%	23%	25%	18%	37%	23%	24%	35%	22%	28%	26%	34%
	Moderate impact	27%	14%	25%	42%	29%	37%	25%	30%	19%	35%	22%	27%	35%	20%	27%	28%
	Significant impact	11%	6%	4%	20%	14%	11%	11%	8%	7%	14%	22%	15%	12%	3%	10%	15%
Your work relationships	No impact	28%	34%	35%	14%	16%	29%	35%	23%	34%	11%	14%	15%	25%	52%	29%	19%
	Low impact	25%	41%	18%	13%	26%	14%	25%	25%	31%	27%	27%	17%	22%	28%	26%	21%
	Some impact	24%	13%	31%	31%	33%	23%	22%	28%	16%	31%	30%	33%	24%	12%	23%	32%
	Moderate impact	14%	9%	12%	21%	17%	20%	11%	18%	12%	20%	16%	19%	16%	7%	12%	22%
	Significant impact	9%	3%	3%	20%	8%	14%	6%	8%	7%	11%	14%	17%	13%	1%	10%	6%

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Defining and Dealing with Stress

How does negative stress impact the following areas of your life?

Your mood	No impact	7%	17%	3%	0%	4%	9%	9%	10%	7%	3%	3%	2%	6%	14%	7%	4%
	Low impact	18%	32%	19%	2%	9%	3%	18%	25%	31%	8%	3%	19%	19%	27%	21%	7%
	Some impact	25%	24%	34%	19%	22%	26%	30%	23%	22%	20%	30%	23%	25%	25%	25%	24%
	Moderate impact	23%	17%	24%	28%	22%	26%	18%	25%	22%	25%	22%	23%	31%	18%	21%	28%
	Significant impact	27%	10%	19%	52%	42%	37%	25%	18%	18%	44%	43%	33%	19%	16%	25%	37%
Your success	No impact	16%	27%	16%	3%	9%	23%	14%	13%	25%	7%	8%	8%	13%	28%	16%	12%
	Low impact	25%	38%	29%	8%	18%	17%	28%	33%	32%	23%	22%	19%	29%	27%	26%	22%
	Some impact	26%	18%	30%	30%	25%	17%	29%	28%	19%	21%	24%	29%	25%	27%	25%	26%
	Moderate impact	20%	10%	20%	30%	22%	26%	15%	18%	19%	28%	22%	15%	22%	15%	20%	19%
	Significant impact	14%	6%	4%	30%	25%	17%	14%	10%	4%	21%	24%	29%	10%	2%	13%	21%

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Defining and Dealing with Stress

How does negative stress impact the following areas of your life?

Your health	Impact	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender		
		Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female	
	No impact	11%	21%	10%	1%	9%	14%	11%	8%	13%	8%	5%	4%	10%	16%	11%	6%
	Low impact	25%	39%	27%	8%	18%	11%	27%	30%	34%	17%	19%	25%	22%	33%	27%	16%
	Some impact	26%	22%	32%	25%	22%	29%	22%	25%	29%	23%	35%	29%	22%	26%	25%	32%
	Moderate impact	21%	10%	16%	37%	18%	26%	23%	28%	16%	24%	22%	17%	29%	17%	21%	21%
	Significant impact	17%	8%	15%	29%	32%	20%	18%	10%	7%	28%	19%	25%	16%	8%	16%	25%

Defining and Dealing with Stress

How important are each of the following in your current efforts to manage stress?

Exercise/yoga	Importance	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender		
		Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female	
	Not at all important	10%	13%	11%	8%	12%	9%	9%	5%	15%	7%	11%	6%	6%	17%	12%	3%
	Not very important	6%	5%	9%	4%	3%	9%	4%	15%	4%	1%	5%	0%	7%	10%	6%	4%
	Neutral	15%	13%	16%	16%	18%	20%	16%	15%	6%	17%	11%	23%	13%	13%	15%	12%
	Somewhat important	28%	33%	25%	25%	25%	20%	30%	38%	34%	24%	19%	31%	28%	33%	29%	25%
	Very important	41%	37%	40%	47%	42%	43%	41%	28%	41%	51%	54%	40%	46%	27%	38%	56%

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Defining and Dealing with Stress

How does negative stress impact the following areas of your life?

Meditation	Not at all important	26%	33%	27%	19%	22%	20%	33%	28%	26%	20%	24%	25%	28%	30%	28%	18%
	Not very important	14%	13%	14%	14%	11%	14%	9%	28%	19%	11%	11%	6%	16%	20%	15%	9%
	Neutral	26%	22%	32%	26%	25%	14%	34%	28%	21%	21%	24%	31%	26%	27%	26%	26%
	Somewhat important	19%	18%	17%	23%	22%	29%	15%	10%	24%	27%	22%	19%	16%	17%	18%	26%
	Very important	14%	14%	10%	18%	20%	23%	9%	8%	10%	21%	19%	19%	13%	6%	13%	21%
Spiritual/religious activities	Not at all important	32%	34%	28%	31%	32%	26%	32%	38%	35%	32%	24%	38%	25%	36%	33%	25%
	Not very important	11%	14%	13%	6%	7%	9%	5%	20%	19%	7%	11%	2%	10%	18%	12%	7%
	Neutral	18%	13%	20%	23%	16%	14%	23%	20%	12%	18%	24%	17%	19%	17%	17%	22%
	Somewhat important	16%	15%	12%	19%	20%	14%	11%	13%	19%	10%	16%	13%	25%	15%	16%	15%
	Very important	24%	24%	27%	20%	26%	37%	29%	10%	15%	32%	24%	31%	21%	15%	22%	31%

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Defining and Dealing with Stress

How does negative stress impact the following areas of your life?

Sports	Not at all important	24%	25%	22%	25%	21%	29%	43%	3%	18%	20%	24%	31%	21%	25%	22%	28%
	Not very important	13%	14%	12%	13%	11%	23%	10%	25%	10%	11%	14%	10%	13%	15%	14%	10%
	Neutral	22%	18%	27%	21%	29%	6%	20%	23%	24%	18%	14%	25%	21%	27%	22%	22%
	Somewhat important	21%	25%	22%	18%	18%	29%	11%	30%	25%	20%	24%	15%	21%	24%	22%	19%
	Very important	20%	18%	18%	24%	21%	14%	15%	20%	24%	31%	24%	19%	25%	9%	20%	21%
Therapy	Not at all important	44%	58%	42%	31%	38%	37%	51%	58%	50%	35%	32%	52%	41%	54%	46%	40%
	Not very important	13%	14%	10%	15%	17%	14%	10%	15%	18%	17%	16%	6%	13%	14%	15%	9%
	Neutral	26%	19%	30%	31%	21%	43%	27%	13%	19%	27%	24%	23%	32%	24%	26%	26%
	Somewhat important	8%	4%	12%	9%	12%	6%	5%	13%	6%	11%	8%	6%	9%	6%	7%	12%
	Very important	8%	5%	6%	13%	12%	0%	8%	3%	7%	10%	19%	13%	4%	3%	7%	13%

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Defining and Dealing with Stress

How does negative stress impact the following areas of your life?

Talking to friends/ family	Not at all important	8%	9%	6%	8%	7%	6%	9%	8%	12%	3%	3%	17%	7%	9%	8%	4%
	Not very important	11%	13%	11%	8%	7%	11%	10%	15%	13%	8%	11%	13%	7%	15%	11%	9%
	Neutral	23%	26%	30%	15%	25%	23%	25%	18%	15%	25%	22%	17%	31%	19%	25%	18%
	Somewhat important	35%	30%	32%	42%	30%	37%	30%	43%	40%	27%	32%	27%	35%	45%	35%	34%
	Very important	24%	22%	20%	27%	32%	23%	25%	18%	21%	37%	32%	27%	19%	13%	21%	35%
Use of stress management programs/ resources	Not at all important	38%	46%	40%	26%	33%	34%	41%	45%	46%	30%	30%	35%	41%	45%	41%	25%
	Not very important	16%	22%	14%	13%	16%	29%	13%	23%	15%	21%	16%	15%	12%	17%	18%	7%
	Neutral	28%	18%	30%	37%	25%	26%	30%	25%	26%	23%	27%	29%	29%	31%	26%	37%
	Somewhat important	11%	7%	12%	14%	16%	9%	10%	5%	9%	17%	14%	15%	10%	5%	10%	15%
	Very important	7%	6%	4%	9%	11%	3%	6%	3%	4%	10%	14%	6%	7%	2%	5%	16%

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Defining and Dealing with Stress

How does negative stress impact the following areas of your life?

Taking small breaks throughout the day	Not at all important	12%	18%	11%	6%	7%	9%	13%	10%	22%	6%	8%	6%	13%	19%	14%	3%
	Not very important	7%	8%	8%	5%	1%	9%	5%	13%	13%	1%	8%	2%	9%	12%	8%	4%
	Neutral	25%	22%	38%	19%	24%	26%	32%	23%	18%	18%	27%	25%	18%	31%	24%	25%
	Somewhat important	35%	33%	34%	38%	37%	37%	33%	45%	32%	39%	38%	35%	38%	30%	36%	35%
	Very important	21%	19%	10%	32%	32%	20%	18%	10%	15%	35%	19%	31%	22%	8%	18%	32%
Breathing exercises	Not at all important	23%	31%	22%	15%	17%	14%	25%	33%	28%	21%	11%	23%	25%	26%	26%	10%
	Not very important	15%	15%	15%	15%	17%	20%	8%	25%	19%	17%	19%	6%	13%	20%	16%	10%
	Neutral	23%	18%	27%	25%	21%	29%	20%	23%	24%	20%	27%	27%	19%	24%	21%	28%
	Somewhat important	25%	22%	28%	26%	26%	31%	32%	18%	16%	27%	27%	23%	24%	24%	25%	26%
	Very important	14%	14%	9%	19%	18%	6%	15%	3%	13%	15%	16%	21%	19%	7%	12%	25%

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Defining and Dealing with Stress

How does negative stress impact the following areas of your life?

Writing/journaling	Not at all important	39%	44%	41%	32%	39%	46%	42%	48%	37%	41%	41%	38%	44%	36%	43%	25%
	Not very important	16%	14%	17%	16%	17%	20%	10%	23%	18%	15%	24%	10%	13%	18%	17%	12%
	Neutral	23%	23%	24%	23%	14%	14%	28%	23%	21%	18%	19%	19%	24%	26%	24%	19%
	Somewhat important	14%	11%	16%	14%	13%	11%	13%	5%	22%	10%	8%	15%	12%	20%	11%	26%
	Very important	8%	7%	2%	14%	16%	9%	8%	3%	3%	15%	8%	19%	7%	0%	6%	18%
Prioritizing activities	Not at all important	7%	9%	5%	5%	4%	9%	5%	8%	12%	4%	0%	6%	3%	13%	8%	1%
	Not very important	4%	6%	5%	1%	4%	3%	3%	8%	4%	1%	3%	2%	0%	10%	5%	1%
	Neutral	17%	14%	22%	16%	13%	20%	24%	20%	6%	11%	14%	27%	13%	18%	18%	12%
	Somewhat important	38%	36%	42%	38%	37%	31%	37%	40%	47%	38%	41%	23%	46%	42%	40%	34%
	Very important	34%	35%	26%	40%	42%	37%	32%	25%	31%	45%	43%	42%	38%	18%	30%	51%

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Working with a Financial Advisor

With how many financial advisors do you currently work?	None	63%	65%	63%	62%	84%	69%	58%	63%	41%	77%	89%	63%	49%	54%	66%	57%
	1	23%	23%	24%	23%	12%	20%	25%	33%	32%	15%	11%	21%	32%	29%	20%	35%
	2	10%	9%	9%	13%	3%	9%	11%	5%	21%	6%	0%	15%	15%	11%	11%	6%
	3	3%	3%	2%	3%	1%	3%	3%	0%	6%	1%	0%	2%	3%	5%	3%	1%
	4 or more	1%	0%	2%	0%	0%	0%	3%	0%	0%	0%	0%	0%	0%	1%	1%	1%
Today, what percentage of your household investable assets is managed by your financial advisor?	Less than 10% of my assets	21%	27%	13%	22%	27%	30%	24%	7%	18%	47%	25%	29%	11%	17%	24%	14%
	10% - 24% of my assets	11%	7%	13%	13%	27%	10%	6%	27%	8%	20%	0%	6%	20%	4%	10%	14%
	25% - 49% of my assets	15%	14%	25%	9%	9%	10%	12%	27%	8%	7%	0%	12%	11%	19%	16%	11%
	50% - 74% of my assets	26%	23%	31%	27%	36%	40%	21%	13%	30%	20%	50%	24%	29%	28%	26%	25%
	75% - 99% of my assets	18%	23%	3%	24%	0%	0%	21%	13%	33%	7%	0%	24%	20%	21%	17%	25%
100% of my assets	8%	7%	16%	4%	0%	10%	15%	13%	5%	0%	25%	6%	9%	11%	8%	11%	

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Working with a Financial Advisor

How many years have you been working with your financial advisor?	Less than 1 year	9%	2%	6%	18%	33%	0%	15%	0%	5%	19%	25%	28%	3%	2%	6%	21%
	Between 1 and 2 years	20%	25%	18%	18%	42%	27%	18%	7%	23%	38%	0%	22%	14%	19%	22%	14%
	Between 3 and 5 years	29%	25%	29%	33%	17%	36%	33%	27%	28%	38%	50%	22%	23%	32%	31%	21%
	Between 6 and 9 years	12%	16%	15%	7%	0%	18%	6%	27%	8%	0%	0%	6%	23%	11%	10%	17%
	10 years or more	29%	32%	32%	24%	8%	18%	27%	40%	38%	6%	25%	22%	37%	36%	31%	28%
	I don't Know	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Thinking about the last 12 months only, how often did you meet with your financial advisor to review your financial plan or portfolio?	Once	15%	14%	15%	16%	50%	27%	12%	13%	8%	31%	50%	17%	14%	6%	12%	24%
	Twice	19%	18%	9%	27%	8%	18%	18%	20%	23%	19%	0%	17%	23%	19%	21%	14%
	Three times	19%	11%	9%	33%	8%	9%	30%	13%	18%	19%	50%	22%	17%	17%	18%	21%
	Four times	16%	18%	18%	13%	0%	27%	15%	27%	18%	13%	0%	0%	20%	23%	17%	14%
	Five or more times	23%	25%	38%	9%	25%	9%	18%	13%	28%	13%	0%	22%	23%	26%	23%	21%
	I did not meet with my advisor in the last 12 months to review my plan or portfolio	9%	14%	12%	2%	8%	9%	6%	13%	8%	6%	0%	22%	3%	9%	9%	7%
How likely are you to continue to use your financial advisor for the next 12-24 months?	Not likely	3%	5%	0%	4%	8%	0%	0%	0%	3%	6%	0%	6%	3%	0%	2%	0%
	Neutral	14%	14%	9%	18%	17%	18%	15%	0%	13%	25%	0%	6%	17%	11%	14%	10%
	Likely	83%	82%	91%	78%	75%	82%	85%	100%	85%	69%	100%	89%	80%	89%	83%	90%

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Working with a Financial Advisor

		All Investors	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female
Please rate your overall level of satisfaction with your financial advisor.	Not satisfied	7%	2%	3%	13%	8%	9%	0%	7%	8%	6%	0%	11%	9%	4%	4%	10%
	Neutral	16%	23%	12%	13%	8%	27%	18%	13%	13%	13%	25%	22%	20%	9%	17%	14%
	Satisfied	77%	75%	85%	73%	83%	64%	82%	80%	80%	81%	75%	67%	71%	87%	79%	76%

Working with a Financial Advisor

To what extent do you agree with the following statements?

		All Investors	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female
I receive high value relative to the fees I pay my advisor	Completely disagree	5%	7%	3%	5%	9%	27%	0%	0%	3%	20%	0%	12%	3%	0%	5%	4%
	Somewhat disagree	8%	2%	3%	19%	9%	18%	13%	0%	5%	13%	0%	0%	11%	9%	9%	4%
	Neutral	27%	33%	33%	16%	27%	18%	22%	27%	35%	13%	25%	35%	31%	23%	30%	19%
	Somewhat agree	28%	29%	24%	30%	0%	27%	31%	27%	38%	20%	0%	18%	26%	39%	30%	22%
	Completely agree	31%	29%	36%	30%	55%	9%	34%	47%	19%	33%	75%	35%	29%	30%	26%	52%

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Working with a Financial Advisor

To what extent do you agree with the following statements?

My advisor provides significant value beyond investment returns	Completely disagree	7%	7%	3%	9%	18%	9%	0%	0%	11%	13%	0%	12%	3%	7%	7%	4%
	Somewhat disagree	12%	12%	12%	11%	18%	18%	12%	13%	3%	20%	0%	12%	17%	7%	11%	14%
	Neutral	23%	26%	21%	23%	0%	27%	24%	20%	32%	0%	25%	24%	26%	26%	24%	18%
	Somewhat agree	26%	26%	27%	25%	27%	27%	36%	20%	26%	40%	0%	18%	23%	30%	27%	25%
	Completely agree	33%	30%	36%	32%	36%	18%	27%	47%	29%	27%	75%	35%	31%	30%	31%	39%
I receive a high level of overall value from working with my advisor	Completely disagree	6%	7%	3%	7%	17%	9%	0%	0%	8%	13%	0%	12%	3%	4%	6%	3%
	Somewhat disagree	5%	2%	3%	9%	8%	9%	6%	7%	3%	6%	0%	0%	9%	4%	6%	3%
	Neutral	16%	18%	15%	16%	0%	27%	21%	13%	13%	6%	25%	24%	14%	17%	13%	24%
	Somewhat agree	38%	36%	44%	34%	25%	45%	33%	33%	51%	38%	0%	29%	40%	43%	45%	17%
	Completely agree	35%	36%	35%	34%	50%	9%	39%	47%	26%	38%	75%	35%	34%	32%	30%	52%

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Working with a Financial Advisor

To what extent do you agree with the following statements?

My advisor is trustworthy	Completely disagree	2%	5%	0%	0%	0%	9%	0%	0%	3%	7%	0%	0%	3%	0%	1%	0%
	Somewhat disagree	2%	0%	0%	5%	0%	9%	0%	0%	0%	0%	0%	6%	3%	0%	1%	4%
	Neutral	6%	5%	0%	12%	10%	9%	9%	0%	3%	0%	25%	12%	3%	6%	2%	19%
	Somewhat agree	23%	27%	24%	17%	20%	18%	27%	27%	23%	21%	0%	18%	32%	21%	27%	7%
	Completely agree	68%	64%	76%	67%	70%	55%	64%	73%	72%	71%	75%	65%	59%	72%	68%	70%
I am comfortable speaking with my advisor about personal issues	Completely disagree	8%	9%	3%	10%	10%	9%	12%	0%	8%	13%	0%	0%	9%	9%	7%	8%
	Somewhat disagree	17%	19%	16%	17%	30%	36%	6%	33%	11%	27%	25%	6%	15%	18%	17%	12%
	Neutral	17%	14%	19%	19%	0%	0%	30%	7%	17%	13%	25%	19%	18%	18%	21%	8%
	Somewhat agree	21%	26%	19%	17%	10%	36%	12%	27%	25%	13%	25%	31%	26%	16%	20%	27%
	Completely agree	38%	33%	44%	38%	50%	18%	39%	33%	39%	33%	25%	44%	32%	40%	36%	46%

Investor Tables

All Investors	Negative Stress Categories				Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress		<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Working with a Financial Advisor

To what extent do you agree with the following statements?

My advisor cares about me beyond my investments	Completely disagree	6%	7%	3%	7%	0%	27%	3%	0%	5%	7%	25%	6%	6%	4%	3%	11%
	Somewhat disagree	9%	9%	6%	11%	27%	0%	9%	7%	8%	13%	0%	12%	11%	6%	9%	11%
	Neutral	17%	18%	12%	18%	9%	27%	15%	7%	18%	13%	0%	24%	6%	23%	16%	14%
	Somewhat agree	27%	30%	30%	23%	9%	9%	27%	33%	41%	13%	0%	18%	40%	28%	31%	18%
	Completely agree	41%	36%	48%	41%	55%	36%	45%	53%	28%	53%	75%	41%	37%	38%	40%	46%
The support that my advisor provides goes beyond managing my money/investments	Completely disagree	8%	7%	6%	9%	9%	18%	3%	0%	13%	7%	0%	6%	6%	11%	6%	11%
	Somewhat disagree	14%	19%	16%	9%	27%	9%	9%	20%	11%	27%	0%	13%	17%	11%	16%	11%
	Neutral	24%	26%	19%	27%	9%	36%	28%	13%	29%	0%	25%	44%	26%	22%	24%	21%
	Somewhat agree	19%	21%	22%	16%	9%	9%	31%	13%	21%	20%	0%	13%	14%	28%	21%	18%
	Completely agree	34%	28%	38%	39%	45%	27%	28%	53%	26%	47%	75%	25%	37%	28%	33%	39%

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Investor Profile Details

What is your age?	<35	22%	17%	17%	30%	63%	43%	6%	0%	0%	100%	0%	0%	0%	0%	23%	16%
	35-44	11%	8%	8%	17%	17%	14%	14%	8%	1%	0%	100%	0%	0%	0%	10%	15%
	45-54	15%	8%	16%	20%	11%	23%	23%	18%	6%	0%	0%	100%	0%	0%	12%	25%
	55-64	21%	28%	20%	14%	5%	11%	22%	39%	30%	0%	0%	0%	100%	0%	19%	27%
	65+	31%	38%	39%	19%	4%	9%	35%	34%	63%	0%	0%	0%	0%	100%	35%	16%
What is your marital status?	Single, never married	21%	18%	20%	25%	46%	31%	10%	10%	3%	56%	27%	21%	10%	3%	21%	22%
	Living with partner	3%	5%	2%	3%	9%	3%	1%	3%	1%	7%	3%	2%	3%	2%	3%	4%
	Married	60%	63%	61%	55%	36%	60%	68%	65%	78%	37%	62%	58%	66%	74%	66%	41%
	Widowed	2%	2%	1%	3%	1%	0%	1%	3%	6%	0%	0%	0%	3%	5%	2%	1%
	Divorced or separated	10%	10%	8%	13%	7%	3%	18%	18%	9%	0%	5%	17%	13%	15%	7%	25%
	Prefer not to answer	4%	2%	8%	3%	1%	3%	1%	3%	3%	0%	3%	2%	4%	2%	2%	6%

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Investor Profile Details

When do you plan on retiring?	Within the next five years	9%	11%	8%	8%	1%	3%	8%	20%	13%	1%	0%	8%	22%	9%	10%	7%
	6-9 years from now	8%	10%	9%	6%	5%	9%	8%	15%	9%	6%	5%	6%	24%	2%	8%	9%
	10-19 years from now	13%	10%	18%	12%	9%	29%	19%	15%	4%	4%	14%	44%	15%	1%	11%	16%
	20 years or more from now	23%	16%	17%	35%	49%	46%	16%	10%	4%	61%	65%	19%	1%	0%	21%	29%
	I don't plan on retiring	7%	9%	3%	9%	12%	3%	8%	3%	6%	13%	3%	10%	3%	8%	8%	4%
	I am already retired	30%	39%	35%	17%	3%	11%	37%	35%	59%	1%	0%	4%	26%	77%	33%	19%
	Not applicable; I am currently not working (e.g., unemployed, student)	2%	2%	1%	3%	5%	0%	3%	0%	1%	4%	0%	4%	3%	1%	2%	6%
	I don't know	7%	2%	9%	9%	16%	0%	3%	3%	3%	10%	14%	4%	6%	2%	6%	9%
What is the highest degree or level of school you have completed? Please select only one.	Education through grade 12	1%	1%	2%	1%	4%	3%	0%	0%	0%	0%	0%	4%	3%	0%	2%	0%
	High school graduate	5%	7%	2%	6%	5%	11%	6%	8%	1%	7%	0%	4%	10%	4%	6%	3%
	College or some college	56%	57%	61%	51%	67%	57%	63%	43%	41%	68%	62%	46%	59%	49%	57%	51%
	Post-graduate degree	36%	34%	32%	42%	22%	29%	29%	50%	56%	24%	38%	44%	26%	47%	34%	46%
	Prefer not to answer	1%	2%	2%	0%	1%	0%	1%	0%	1%	1%	0%	2%	1%	0%	1%	0%

Investor Tables

All Investors	Negative Stress Categories			Current Total Investable Assets					Investor Age					Investor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50,000	\$50,000 - \$99,999	\$100,000 - \$499,999	\$500,000 - \$999,999	\$1,000,000 or more	<35	35-44	45-54	55-64	65+	Male	Female

Investor Profile Details

What is your annual household income?	<\$50,000	16%	10%	18%	21%	39%	9%	15%	8%	0%	30%	14%	19%	13%	10%	16%	18%
	\$50,000 - \$99,999	30%	36%	29%	25%	34%	40%	38%	30%	21%	35%	30%	23%	26%	35%	31%	25%
	\$100,000 - \$199,999	30%	35%	24%	29%	17%	43%	32%	43%	43%	23%	43%	33%	35%	26%	29%	37%
	\$200,000 - \$299,999	5%	5%	4%	6%	0%	6%	4%	13%	10%	4%	5%	4%	7%	5%	7%	0%
	\$300,000 - \$399,999	1%	2%	0%	3%	0%	0%	0%	3%	6%	0%	0%	2%	0%	4%	2%	1%
	\$400,000 - \$499,000	1%	0%	1%	1%	0%	0%	0%	0%	3%	0%	0%	0%	1%	1%	1%	0%
	\$500,000+	2%	2%	2%	1%	0%	0%	1%	3%	6%	0%	3%	2%	3%	2%	2%	1%
	Prefer not to answer	15%	10%	22%	15%	9%	3%	10%	3%	12%	8%	5%	17%	13%	17%	13%	18%
Please tell us which best describes your current total investable assets, including all mutual funds, stocks, bonds, 401(K), IRA and other retirement accounts, but excluding real estate.	<\$50,000	26%	17%	23%	38%	100%	0%	0%	0%	0%	71%	39%	18%	7%	3%	24%	31%
	\$50,000 - \$99,999	12%	9%	15%	13%	0%	100%	0%	0%	0%	22%	15%	18%	7%	3%	12%	10%
	\$100,000 - \$499,999	27%	31%	23%	24%	0%	0%	100%	0%	0%	7%	33%	40%	28%	31%	24%	37%
	\$500,000 - \$999,999	13%	17%	14%	10%	0%	0%	0%	100%	0%	0%	9%	16%	25%	15%	14%	11%
	\$1,000,000 or more	23%	27%	25%	16%	0%	0%	0%	0%	100%	0%	3%	9%	33%	47%	26%	11%

STUDY:

The War on Stress 2019

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Janus Henderson
INVESTORS

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