

STUDY:

The War on Stress 2019

Financial Advisor Tables

Advisor Tables

All Advisors	Negative Stress Categories			Assets Under Management					Advisor Age					Advisor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<35	35-44	45-54	55-64	65+	Male	Female

Satisfaction and Concerns with Different Aspects of Life and Business

How satisfied are you right now with each of these in your life and/or business?

Personal health	Very dissatisfied	8%	1%	2%	19%	7%	7%	10%	6%	13%	11%	6%	11%	4%	12%	7%	9%
	Somewhat dissatisfied	22%	8%	24%	33%	20%	27%	16%	26%	25%	27%	24%	29%	17%	15%	24%	20%
	Neutral	12%	3%	17%	15%	12%	8%	16%	11%	6%	9%	10%	14%	13%	6%	10%	15%
	Somewhat satisfied	40%	53%	42%	27%	42%	44%	35%	43%	44%	36%	45%	34%	45%	35%	41%	38%
	Very satisfied	18%	35%	15%	7%	20%	14%	24%	14%	13%	18%	14%	12%	21%	32%	19%	17%
Health of family/friends	Very dissatisfied	4%	0%	2%	8%	5%	5%	2%	3%	0%	0%	4%	7%	3%	0%	1%	7%
	Somewhat dissatisfied	13%	14%	8%	17%	11%	17%	10%	20%	0%	11%	6%	14%	19%	9%	13%	14%
	Neutral	21%	12%	24%	25%	23%	14%	20%	17%	13%	22%	18%	21%	20%	21%	21%	19%
	Somewhat satisfied	38%	38%	42%	33%	31%	42%	41%	31%	63%	38%	41%	38%	39%	32%	38%	38%
	Very satisfied	25%	35%	24%	17%	30%	22%	27%	29%	25%	29%	31%	20%	19%	38%	26%	23%
Personal financial situation	Very dissatisfied	8%	2%	2%	17%	11%	5%	6%	0%	6%	7%	14%	6%	7%	6%	6%	9%
	Somewhat dissatisfied	16%	9%	15%	22%	21%	19%	6%	14%	6%	18%	16%	21%	12%	9%	17%	15%
	Neutral	15%	11%	18%	15%	20%	12%	12%	14%	6%	13%	10%	16%	18%	9%	15%	14%
	Somewhat satisfied	38%	38%	44%	32%	35%	41%	41%	34%	56%	49%	43%	41%	29%	32%	37%	41%
	Very satisfied	24%	40%	21%	14%	13%	24%	35%	37%	25%	13%	16%	15%	34%	44%	25%	21%

Advisor Tables

All Advisors	Negative Stress Categories			Assets Under Management					Advisor Age					Advisor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<35	35-44	45-54	55-64	65+	Male	Female

Satisfaction and Concerns with Different Aspects of Life and Business

How satisfied are you right now with each of these in your life and/or business?

Strength of family relationships	Very dissatisfied	2%	0%	0%	6%	2%	8%	0%	0%	0%	0%	2%	2%	4%	0%	2%	2%
	Somewhat dissatisfied	12%	7%	8%	18%	13%	8%	12%	6%	6%	13%	6%	18%	9%	9%	12%	11%
	Neutral	14%	7%	18%	16%	16%	12%	12%	6%	13%	13%	12%	18%	14%	9%	15%	11%
	Somewhat satisfied	35%	34%	40%	33%	31%	31%	35%	43%	50%	31%	49%	33%	37%	18%	37%	32%
	Very satisfied	37%	53%	34%	28%	38%	41%	41%	46%	31%	42%	31%	29%	36%	65%	34%	44%
Strength of your team at work	Very dissatisfied	5%	1%	5%	9%	12%	5%	0%	3%	0%	7%	6%	5%	5%	6%	4%	7%
	Somewhat dissatisfied	15%	11%	16%	16%	15%	14%	16%	11%	0%	18%	14%	18%	14%	6%	15%	15%
	Neutral	22%	19%	23%	24%	30%	15%	12%	14%	0%	24%	22%	21%	23%	18%	25%	17%
	Somewhat satisfied	33%	33%	34%	31%	26%	32%	43%	34%	56%	38%	35%	32%	27%	38%	34%	31%
	Very satisfied	25%	36%	23%	19%	16%	34%	29%	37%	44%	13%	22%	25%	31%	32%	22%	31%
Growth trajectory for business	Very dissatisfied	5%	0%	3%	10%	7%	8%	0%	3%	0%	2%	8%	5%	5%	0%	5%	4%
	Somewhat dissatisfied	14%	11%	13%	16%	19%	10%	10%	11%	6%	13%	12%	14%	15%	15%	12%	15%
	Neutral	27%	21%	26%	31%	23%	31%	29%	20%	25%	24%	20%	33%	22%	35%	28%	24%
	Somewhat satisfied	40%	47%	39%	36%	37%	39%	49%	34%	56%	38%	43%	38%	46%	26%	42%	39%
	Very satisfied	15%	21%	19%	6%	15%	12%	12%	31%	13%	22%	16%	11%	12%	24%	14%	17%

Advisor Tables

All Advisors	Negative Stress Categories			Assets Under Management					Advisor Age					Advisor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<35	35-44	45-54	55-64	65+	Male	Female

Satisfaction and Concerns with Different Aspects of Life and Business

How satisfied are you right now with each of these in your life and/or business?

Profitability of your business	Very dissatisfied	8%	3%	4%	15%	15%	3%	10%	3%	0%	4%	8%	8%	8%	6%	7%	9%
	Somewhat dissatisfied	15%	14%	14%	16%	22%	14%	6%	6%	0%	20%	18%	14%	12%	12%	12%	21%
	Neutral	22%	18%	23%	25%	23%	17%	12%	11%	31%	42%	24%	20%	18%	9%	23%	19%
	Somewhat satisfied	37%	37%	42%	34%	29%	47%	41%	54%	50%	20%	37%	41%	41%	44%	39%	36%
	Very satisfied	18%	27%	18%	10%	11%	19%	31%	26%	19%	13%	12%	16%	21%	29%	19%	15%
Overall client experience being delivered	Very dissatisfied	1%	0%	0%	3%	3%	2%	0%	0%	0%	0%	4%	1%	1%	0%	2%	0%
	Somewhat dissatisfied	10%	7%	8%	15%	13%	8%	8%	6%	6%	13%	12%	12%	6%	9%	11%	9%
	Neutral	15%	10%	15%	19%	16%	12%	10%	3%	13%	20%	12%	14%	14%	15%	15%	13%
	Somewhat satisfied	50%	43%	59%	47%	46%	51%	53%	69%	56%	47%	57%	55%	52%	29%	51%	50%
	Very satisfied	24%	41%	18%	16%	22%	27%	29%	23%	25%	20%	14%	18%	27%	47%	21%	29%
Personal fulfillment with the work you do	Very dissatisfied	4%	1%	1%	9%	3%	2%	4%	3%	0%	4%	4%	5%	3%	3%	3%	5%
	Somewhat dissatisfied	6%	1%	7%	10%	5%	5%	2%	9%	6%	9%	4%	8%	5%	6%	6%	7%
	Neutral	12%	7%	10%	16%	15%	8%	8%	6%	6%	18%	12%	12%	6%	15%	11%	11%
	Somewhat satisfied	33%	30%	35%	34%	37%	31%	33%	34%	50%	42%	37%	32%	35%	18%	37%	28%
	Very satisfied	45%	62%	47%	30%	41%	54%	53%	49%	38%	27%	43%	44%	51%	59%	43%	49%

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	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<35	35-44	45-54	55-64	65+	Male	Female

Key Challenges

Which if any of the following do you believe holds you back from reaching your goals?	Poor time management	35%	34%	38%	34%	44%	37%	33%	28%	15%	45%	44%	39%	28%	20%	42%	26%	
	Team dynamics	14%	16%	14%	13%	17%	11%	15%	16%	15%	14%	13%	16%	13%	13%	13%	13%	17%
	Regulatory requirements	14%	16%	15%	12%	13%	15%	13%	22%	0%	11%	7%	9%	25%	10%	18%	8%	
	A significant change in the business (e.g., change of firm)	17%	13%	11%	24%	17%	19%	21%	6%	15%	14%	20%	18%	15%	17%	13%	21%	
	Ineffective use of technology	27%	29%	24%	27%	28%	22%	25%	28%	46%	32%	20%	28%	26%	23%	22%	34%	
	My own mindset	33%	30%	35%	34%	31%	46%	31%	19%	23%	32%	24%	34%	37%	40%	37%	28%	
	Not enough support from my firm	11%	6%	8%	16%	9%	11%	4%	9%	15%	18%	13%	9%	9%	3%	8%	15%	
	Not enough staff	19%	13%	20%	21%	12%	17%	29%	31%	38%	11%	22%	16%	20%	27%	19%	18%	
	None of the above	8%	12%	9%	4%	7%	7%	6%	9%	0%	7%	11%	7%	6%	17%	7%	10%	

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All Advisors	Negative Stress Categories			Assets Under Management					Advisor Age					Advisor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<35	35-44	45-54	55-64	65+	Male	Female

Key Challenges

Please select from among these factors what you consider to be the top two most challenging for your business.	Dealing with fiduciary and regulatory responsibilities	19%	25%	24%	11%	23%	14%	25%	26%	0%	7%	6%	17%	28%	39%	23%	14%
	Marketing and building my business	38%	31%	39%	42%	50%	43%	27%	18%	27%	40%	38%	43%	35%	26%	38%	35%
	Maintaining a reasonable balance between work and life	38%	22%	35%	52%	36%	31%	43%	38%	47%	31%	48%	44%	30%	32%	33%	43%
	Delivering or properly establishing client expectations around investment performance	7%	6%	4%	11%	9%	9%	6%	9%	7%	14%	6%	10%	3%	6%	9%	5%
	Communicating effectively with clients during volatile markets	8%	13%	9%	4%	9%	7%	14%	6%	7%	12%	10%	5%	11%	3%	7%	12%
	Effectively managing client relationships and meeting their expectations (client demands)	20%	18%	23%	18%	16%	28%	12%	12%	27%	21%	29%	15%	21%	13%	20%	20%
	Finding new team members	13%	13%	14%	13%	11%	14%	16%	24%	13%	10%	29%	8%	12%	13%	14%	12%
	Managing and coaching a team	13%	16%	12%	11%	6%	14%	16%	24%	20%	17%	6%	19%	9%	13%	12%	15%
	Finding a successor for the business and/or defining a legacy plan	8%	8%	9%	6%	5%	10%	10%	9%	13%	0%	0%	6%	17%	10%	6%	10%
	Differentiating my business from competitors	10%	11%	12%	9%	14%	10%	6%	9%	13%	17%	10%	10%	6%	16%	12%	9%
	Differentiating myself from automated offers (e.g., robos)	1%	1%	0%	2%	2%	0%	0%	0%	0%	5%	0%	1%	0%	0%	1%	2%
	Adapting to rapid technological change and integration fee pressures	12%	17%	9%	11%	11%	10%	16%	18%	7%	5%	6%	12%	15%	23%	14%	10%

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	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<35	35-44	45-54	55-64	65+	Male	Female

Defining and Dealing with Stress

How stressful do you find each of the following for your business today?

Dealing with fiduciary and regulatory responsibilities	Not at all stressful	14%	21%	12%	10%	16%	19%	8%	11%	13%	20%	18%	12%	11%	12%	12%	16%
	Not very stressful	21%	22%	23%	20%	25%	12%	20%	26%	31%	33%	24%	18%	23%	6%	19%	25%
	Neutral	19%	12%	23%	20%	15%	15%	16%	11%	38%	27%	20%	14%	18%	21%	18%	20%
	Somewhat stressful	35%	34%	37%	34%	38%	42%	43%	31%	19%	13%	31%	46%	37%	38%	42%	26%
	Very stressful	11%	11%	6%	16%	7%	12%	14%	20%	0%	7%	6%	11%	12%	24%	10%	14%
Marketing and building my business	Not at all stressful	7%	13%	7%	3%	7%	5%	10%	11%	0%	7%	0%	5%	7%	26%	7%	9%
	Not very stressful	13%	14%	13%	12%	10%	12%	20%	17%	13%	9%	20%	15%	12%	9%	13%	13%
	Neutral	24%	32%	21%	20%	19%	22%	18%	31%	31%	31%	29%	16%	21%	29%	23%	25%
	Somewhat stressful	39%	27%	52%	36%	43%	39%	33%	31%	44%	36%	35%	40%	45%	29%	41%	34%
	Very stressful	17%	13%	8%	28%	21%	22%	20%	9%	13%	18%	16%	24%	15%	6%	15%	20%
Maintaining a reasonable balance between work and life	Not at all stressful	7%	13%	5%	3%	7%	8%	6%	6%	6%	2%	4%	2%	14%	9%	8%	4%
	Not very stressful	12%	22%	10%	4%	11%	8%	16%	6%	19%	27%	10%	5%	11%	12%	14%	9%
	Neutral	17%	21%	24%	9%	16%	24%	8%	17%	25%	9%	12%	18%	22%	21%	17%	17%
	Somewhat stressful	42%	36%	48%	41%	46%	34%	53%	46%	19%	38%	45%	48%	38%	38%	43%	41%
	Very stressful	23%	8%	13%	43%	20%	25%	18%	26%	31%	24%	29%	27%	16%	21%	18%	29%

Advisor Tables

All Advisors	Negative Stress Categories			Assets Under Management					Advisor Age					Advisor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<35	35-44	45-54	55-64	65+	Male	Female

Defining and Dealing with Stress

How stressful do you find each of the following for your business today?

Delivering or properly establishing client expectations around investment performance	Not at all stressful	11%	19%	8%	7%	8%	8%	12%	11%	0%	9%	10%	7%	14%	18%	10%	13%
	Not very stressful	25%	27%	27%	22%	24%	24%	24%	40%	44%	20%	20%	33%	25%	15%	26%	24%
	Neutral	29%	24%	34%	28%	28%	29%	29%	14%	19%	36%	31%	22%	32%	29%	31%	26%
	Somewhat stressful	27%	26%	25%	31%	32%	34%	25%	29%	25%	31%	24%	31%	23%	32%	26%	30%
	Very stressful	7%	3%	6%	12%	8%	5%	10%	6%	13%	4%	14%	7%	6%	6%	7%	8%
Communicating effectively with clients during volatile markets	Not at all stressful	9%	18%	7%	4%	9%	8%	4%	11%	6%	4%	8%	7%	11%	12%	7%	11%
	Not very stressful	23%	22%	24%	24%	24%	22%	25%	31%	31%	31%	20%	26%	23%	9%	25%	19%
	Neutral	23%	18%	29%	22%	20%	24%	25%	11%	19%	24%	22%	15%	25%	35%	25%	20%
	Somewhat stressful	38%	36%	35%	42%	39%	41%	39%	37%	38%	38%	39%	42%	35%	41%	37%	41%
	Very stressful	7%	7%	6%	8%	8%	5%	6%	9%	6%	2%	10%	9%	6%	3%	5%	9%
Effectively managing client relationships and meeting their expectations (client demands)	Not at all stressful	7%	13%	5%	4%	10%	7%	4%	6%	6%	4%	0%	5%	9%	15%	5%	9%
	Not very stressful	21%	34%	15%	16%	22%	24%	20%	23%	25%	24%	6%	22%	25%	24%	22%	19%
	Neutral	19%	20%	25%	13%	18%	14%	22%	14%	19%	24%	22%	14%	18%	18%	21%	15%
	Somewhat stressful	43%	29%	49%	49%	37%	49%	47%	51%	50%	38%	53%	51%	38%	38%	40%	49%
	Very stressful	10%	4%	7%	17%	13%	7%	8%	6%	0%	9%	18%	8%	9%	6%	12%	8%

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	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<35	35-44	45-54	55-64	65+	Male	Female

Defining and Dealing with Stress

How stressful do you find each of the following for your business today?

Finding new team members	Not at all stressful	19%	19%	18%	21%	21%	27%	16%	9%	6%	20%	12%	19%	22%	24%	23%	12%
	Not very stressful	10%	7%	13%	9%	13%	10%	8%	9%	6%	9%	8%	11%	8%	12%	10%	9%
	Neutral	32%	36%	32%	28%	37%	29%	14%	34%	44%	47%	27%	28%	33%	26%	31%	33%
	Somewhat stressful	23%	27%	21%	21%	19%	14%	41%	26%	19%	18%	37%	24%	16%	26%	22%	25%
	Very stressful	16%	11%	16%	21%	10%	20%	22%	23%	25%	7%	16%	19%	21%	12%	14%	21%
Managing and coaching a team	Not at all stressful	17%	21%	18%	13%	25%	17%	14%	6%	13%	18%	14%	13%	17%	24%	18%	15%
	Not very stressful	17%	19%	15%	16%	14%	14%	22%	17%	19%	20%	18%	14%	17%	18%	18%	15%
	Neutral	29%	20%	31%	34%	32%	29%	16%	29%	31%	31%	29%	27%	29%	29%	30%	26%
	Somewhat stressful	30%	37%	28%	26%	25%	34%	37%	37%	25%	24%	33%	36%	29%	21%	29%	33%
	Very stressful	8%	3%	8%	11%	5%	7%	12%	11%	13%	7%	6%	9%	7%	9%	5%	11%
Finding a successor for the business and/or defining a legacy plan	Not at all stressful	33%	32%	34%	34%	36%	37%	31%	26%	50%	53%	49%	25%	25%	29%	37%	28%
	Not very stressful	17%	24%	12%	16%	18%	15%	14%	26%	19%	16%	18%	18%	16%	21%	17%	15%
	Neutral	26%	23%	29%	26%	27%	20%	16%	26%	13%	24%	27%	31%	27%	12%	25%	28%
	Somewhat stressful	15%	12%	16%	16%	14%	15%	24%	9%	13%	4%	4%	20%	15%	26%	14%	15%
	Very stressful	9%	9%	8%	9%	5%	12%	16%	14%	6%	2%	2%	7%	17%	12%	6%	13%

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Defining and Dealing with Stress

How stressful do you find each of the following for your business today?

Differentiating my business from competitors	Not at all stressful	13%	22%	12%	8%	11%	20%	16%	20%	6%	9%	8%	13%	14%	26%	13%	14%
	Not very stressful	26%	31%	25%	24%	28%	24%	22%	37%	25%	27%	31%	27%	24%	26%	29%	24%
	Neutral	23%	22%	25%	23%	22%	22%	25%	11%	19%	27%	20%	20%	27%	21%	25%	21%
	Somewhat stressful	30%	21%	34%	34%	30%	29%	31%	26%	38%	33%	29%	33%	31%	18%	25%	36%
	Very stressful	7%	4%	5%	10%	8%	5%	6%	6%	13%	4%	12%	7%	4%	9%	7%	6%
Differentiating myself from automated offers (e.g., robos)	Not at all stressful	32%	43%	30%	24%	35%	36%	33%	34%	25%	27%	24%	35%	32%	41%	31%	32%
	Not very stressful	31%	26%	37%	28%	26%	31%	33%	46%	31%	31%	35%	32%	33%	18%	31%	31%
	Neutral	23%	22%	21%	26%	22%	20%	20%	14%	19%	16%	24%	20%	23%	35%	23%	21%
	Somewhat stressful	12%	5%	12%	17%	11%	14%	14%	3%	25%	24%	14%	8%	12%	3%	12%	13%
	Very stressful	3%	3%	0%	4%	6%	0%	0%	3%	0%	2%	2%	5%	1%	3%	3%	3%
Adapting to rapid technological change and integration fee pressures	Not at all stressful	12%	18%	12%	8%	16%	12%	8%	3%	13%	24%	10%	11%	8%	12%	12%	13%
	Not very stressful	18%	15%	17%	22%	16%	19%	20%	23%	19%	22%	27%	22%	9%	15%	20%	15%
	Neutral	26%	23%	33%	22%	24%	19%	20%	31%	38%	27%	39%	22%	28%	12%	24%	27%
	Somewhat stressful	34%	37%	32%	34%	33%	46%	41%	31%	19%	22%	20%	34%	39%	53%	35%	32%
	Very stressful	10%	7%	6%	16%	11%	5%	12%	11%	13%	4%	4%	11%	15%	9%	8%	13%

Advisor Tables

All Advisors	Negative Stress Categories			Assets Under Management					Advisor Age					Advisor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<35	35-44	45-54	55-64	65+	Male	Female

Defining and Dealing with Stress

To what extent do you agree or disagree with each of the following statements?

I am comfortable with the level of stress in my life right now	Strongly disagree	16%	2%	3%	39%	20%	15%	10%	11%	13%	16%	22%	22%	12%	6%	12%	22%
	Somewhat disagree	33%	18%	34%	44%	25%	39%	49%	31%	31%	31%	35%	40%	25%	38%	36%	29%
	Neutral	17%	16%	29%	7%	22%	12%	12%	20%	19%	18%	14%	14%	22%	18%	16%	19%
	Somewhat agree	26%	43%	30%	9%	28%	25%	22%	29%	25%	27%	27%	16%	32%	29%	27%	25%
	Strongly agree	8%	21%	4%	1%	6%	8%	8%	9%	13%	9%	2%	7%	9%	9%	9%	5%
I need to manage better or reduce the amount of negative stress in my life right now	Strongly disagree	5%	11%	5%	0%	3%	7%	8%	3%	0%	4%	0%	6%	4%	9%	3%	8%
	Somewhat disagree	14%	31%	13%	1%	16%	15%	12%	14%	6%	16%	14%	11%	12%	24%	16%	9%
	Neutral	18%	26%	23%	8%	21%	5%	14%	31%	38%	18%	20%	12%	22%	21%	20%	16%
	Somewhat agree	39%	27%	48%	39%	35%	51%	37%	31%	31%	38%	33%	41%	41%	35%	41%	36%
	Strongly agree	25%	4%	11%	53%	25%	22%	29%	20%	25%	24%	33%	31%	21%	12%	21%	31%
I am better able to manage stress than most of my peers	Strongly disagree	1%	0%	1%	2%	2%	0%	2%	0%	0%	2%	0%	1%	1%	0%	0%	3%
	Somewhat disagree	10%	1%	4%	23%	11%	12%	8%	11%	6%	16%	12%	13%	5%	9%	12%	7%
	Neutral	35%	25%	40%	40%	40%	37%	31%	23%	19%	29%	35%	36%	37%	38%	34%	36%
	Somewhat agree	33%	37%	36%	27%	30%	34%	39%	29%	50%	33%	35%	31%	33%	38%	33%	33%
	Strongly agree	20%	36%	20%	9%	17%	17%	20%	37%	25%	20%	18%	19%	24%	15%	20%	21%

Advisor Tables

All Advisors	Negative Stress Categories			Assets Under Management					Advisor Age					Advisor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<35	35-44	45-54	55-64	65+	Male	Female

Defining and Dealing with Stress

To what extent do you agree or disagree with each of the following statements?

I am better able to manage stress than most of my family and friends	Strongly disagree	2%	0%	1%	4%	2%	3%	2%	0%	0%	4%	0%	2%	2%	0%	2%	3%
	Somewhat disagree	8%	1%	3%	18%	7%	8%	10%	11%	6%	9%	16%	9%	3%	6%	10%	5%
	Neutral	28%	19%	32%	33%	32%	24%	24%	17%	13%	27%	35%	34%	24%	21%	23%	35%
	Somewhat agree	38%	41%	38%	36%	38%	47%	37%	34%	44%	38%	31%	31%	42%	56%	41%	34%
	Strongly agree	24%	40%	26%	9%	22%	17%	27%	37%	38%	22%	18%	24%	28%	18%	24%	23%
Reducing negative stress in my life would have a positive effect in my business life	Strongly disagree	2%	2%	2%	1%	3%	2%	2%	0%	0%	2%	0%	1%	1%	3%	1%	3%
	Somewhat disagree	3%	5%	3%	0%	3%	7%	0%	0%	0%	2%	2%	2%	2%	3%	2%	3%
	Neutral	12%	19%	13%	4%	11%	7%	12%	11%	19%	7%	12%	15%	8%	15%	11%	11%
	Somewhat agree	40%	38%	50%	33%	39%	36%	39%	51%	44%	33%	39%	32%	49%	50%	43%	37%
	Strongly agree	44%	35%	32%	62%	44%	49%	47%	37%	38%	56%	47%	49%	39%	29%	44%	45%
Reducing negative stress in my life would have a positive effect in my personal life	Strongly disagree	2%	4%	2%	1%	3%	3%	2%	0%	6%	4%	0%	1%	2%	3%	1%	4%
	Somewhat disagree	2%	5%	2%	0%	2%	5%	2%	3%	0%	2%	0%	5%	2%	0%	2%	3%
	Neutral	11%	15%	16%	3%	9%	5%	10%	17%	13%	7%	12%	11%	12%	12%	10%	12%
	Somewhat agree	37%	37%	46%	29%	43%	34%	33%	46%	38%	29%	41%	34%	38%	50%	40%	32%
	Strongly agree	47%	37%	34%	67%	42%	53%	53%	34%	44%	58%	47%	49%	46%	35%	47%	49%

Advisor Tables

All Advisors	Negative Stress Categories			Assets Under Management					Advisor Age					Advisor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<35	35-44	45-54	55-64	65+	Male	Female

Defining and Dealing with Stress

How does the level of stress in your life compare to:

The level of stress in your life 12 months ago	Lower	25%	34%	28%	16%	29%	25%	20%	31%	25%	47%	33%	18%	21%	18%	27%	24%
	About the same	47%	58%	47%	39%	43%	47%	45%	46%	56%	22%	45%	45%	59%	59%	47%	48%
	Higher	27%	8%	25%	46%	27%	27%	35%	23%	19%	31%	22%	38%	20%	24%	26%	28%
The level of stress in your life 5 years ago	Lower	34%	47%	34%	22%	24%	34%	37%	51%	38%	31%	31%	36%	34%	38%	33%	36%
	About the same	22%	21%	27%	19%	29%	24%	20%	9%	19%	18%	20%	19%	25%	32%	23%	21%
	Higher	44%	32%	39%	59%	47%	42%	43%	40%	44%	51%	49%	45%	41%	29%	44%	44%

Advisor Tables

All Advisors	Negative Stress Categories			Assets Under Management					Advisor Age					Advisor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<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	5%	13%	3%	1%	5%	5%	2%	3%	6%	7%	2%	5%	5%	6%	6%	3%
	Low impact	10%	13%	13%	4%	8%	8%	12%	11%	13%	13%	2%	11%	12%	12%	10%	10%
	Some impact	29%	33%	35%	21%	33%	22%	27%	20%	25%	36%	31%	24%	29%	35%	31%	25%
	Moderate impact	38%	33%	38%	41%	34%	49%	41%	43%	31%	31%	33%	38%	38%	47%	37%	39%
	Significant impact	18%	8%	11%	33%	20%	15%	18%	23%	25%	13%	33%	24%	16%	0%	16%	22%
Your work relationships	No impact	7%	13%	5%	4%	7%	7%	6%	3%	6%	11%	4%	2%	9%	6%	8%	5%
	Low impact	22%	29%	25%	14%	20%	25%	18%	11%	31%	27%	24%	19%	21%	26%	22%	23%
	Some impact	31%	27%	38%	27%	34%	31%	39%	37%	19%	27%	22%	36%	33%	29%	34%	24%
	Moderate impact	31%	24%	29%	39%	31%	31%	31%	34%	38%	27%	31%	29%	33%	38%	29%	36%
	Significant impact	9%	7%	3%	16%	8%	7%	6%	14%	6%	9%	18%	13%	4%	0%	7%	12%
How does negative stress impact the following areas of your life? Your mood	No impact	4%	10%	2%	0%	4%	5%	2%	0%	0%	4%	0%	2%	4%	3%	4%	3%
	Low impact	8%	13%	9%	2%	9%	5%	6%	3%	19%	11%	4%	5%	11%	9%	9%	6%
	Some impact	27%	37%	34%	14%	35%	29%	20%	20%	25%	27%	27%	27%	25%	41%	29%	24%
	Moderate impact	35%	27%	39%	36%	26%	34%	47%	40%	38%	27%	33%	31%	42%	32%	34%	35%
	Significant impact	27%	12%	16%	48%	25%	27%	25%	37%	19%	31%	37%	35%	18%	15%	23%	32%

Advisor Tables

All Advisors	Negative Stress Categories			Assets Under Management					Advisor Age					Advisor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<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?

our success	No impact	5%	14%	2%	0%	5%	3%	4%	3%	6%	4%	0%	4%	5%	9%	5%	3%
	Low impact	14%	20%	14%	9%	11%	14%	16%	14%	25%	24%	14%	11%	13%	15%	15%	13%
	Some impact	34%	38%	40%	24%	36%	27%	47%	26%	19%	33%	35%	27%	34%	50%	35%	30%
	Moderate impact	31%	22%	36%	34%	33%	37%	20%	37%	44%	31%	29%	32%	35%	21%	31%	32%
	Significant impact	17%	5%	8%	33%	15%	19%	14%	20%	6%	7%	22%	27%	14%	6%	13%	21%
Your health	No impact	5%	13%	2%	1%	6%	3%	4%	0%	0%	9%	2%	4%	5%	3%	6%	3%
	Low impact	17%	27%	16%	9%	15%	15%	20%	17%	19%	7%	10%	13%	22%	38%	21%	12%
	Some impact	24%	26%	35%	12%	31%	24%	24%	11%	19%	24%	27%	21%	24%	24%	26%	19%
	Moderate impact	29%	24%	31%	30%	27%	32%	33%	31%	38%	36%	33%	26%	29%	18%	25%	36%
	Significant impact	26%	9%	16%	47%	21%	25%	20%	40%	25%	24%	29%	36%	19%	18%	22%	30%

Advisor Tables

All Advisors	Negative Stress Categories			Assets Under Management					Advisor Age					Advisor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<35	35-44	45-54	55-64	65+	Male	Female

Defining and Dealing with Stress

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

Exercise/yoga	Not at all important	6%	7%	3%	8%	6%	7%	6%	6%	6%	7%	4%	5%	5%	12%	8%	3%
	Not very important	5%	3%	6%	7%	11%	2%	2%	0%	0%	13%	8%	4%	2%	6%	6%	4%
	Neutral	13%	9%	16%	14%	16%	15%	12%	11%	6%	11%	12%	16%	11%	12%	14%	9%
	Somewhat important	27%	24%	30%	27%	23%	27%	20%	43%	31%	31%	29%	29%	24%	21%	28%	26%
	Very important	49%	57%	45%	45%	44%	49%	61%	40%	56%	38%	47%	46%	58%	50%	44%	57%
Meditation	Not at all important	29%	32%	30%	27%	22%	41%	33%	34%	44%	20%	18%	33%	34%	29%	34%	21%
	Not very important	13%	12%	15%	11%	16%	8%	6%	23%	6%	18%	24%	12%	7%	9%	13%	14%
	Neutral	21%	21%	21%	22%	22%	22%	20%	17%	19%	27%	22%	24%	18%	21%	22%	19%
	Somewhat important	21%	16%	26%	19%	23%	15%	22%	14%	31%	22%	10%	21%	21%	32%	19%	26%
	Very important	16%	19%	8%	21%	18%	14%	20%	11%	0%	13%	24%	11%	20%	9%	13%	21%
Spiritual/religious activities	Not at all important	21%	20%	14%	29%	17%	25%	22%	26%	38%	24%	20%	22%	19%	21%	22%	20%
	Not very important	12%	13%	12%	12%	10%	15%	16%	9%	19%	13%	8%	18%	14%	3%	14%	11%
	Neutral	14%	7%	21%	14%	17%	10%	14%	14%	0%	7%	14%	19%	15%	12%	13%	15%
	Somewhat important	19%	18%	23%	18%	23%	12%	24%	17%	13%	22%	20%	16%	19%	21%	18%	21%
	Very important	33%	43%	30%	27%	33%	37%	25%	34%	31%	33%	37%	25%	34%	44%	33%	33%

Advisor Tables

All Advisors	Negative Stress Categories			Assets Under Management					Advisor Age					Advisor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<35	35-44	45-54	55-64	65+	Male	Female

Defining and Dealing with Stress

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

Sports	Not at all important	21%	24%	20%	20%	19%	20%	22%	26%	19%	31%	14%	16%	22%	24%	16%	29%
	Not very important	14%	7%	15%	19%	15%	12%	18%	9%	19%	16%	20%	19%	9%	6%	10%	22%
	Neutral	18%	18%	18%	18%	20%	17%	24%	11%	13%	16%	20%	20%	15%	21%	21%	12%
	Somewhat important	27%	30%	32%	21%	27%	32%	20%	31%	25%	22%	27%	27%	29%	29%	31%	20%
	Very important	20%	22%	15%	22%	19%	19%	18%	23%	25%	16%	18%	18%	24%	21%	22%	17%
Therapy	Not at all important	44%	53%	43%	38%	37%	49%	45%	51%	50%	38%	22%	47%	51%	53%	46%	41%
	Not very important	15%	14%	14%	16%	21%	15%	18%	6%	6%	18%	24%	13%	11%	18%	17%	13%
	Neutral	24%	20%	25%	27%	22%	22%	24%	23%	38%	27%	29%	22%	24%	21%	23%	24%
	Somewhat important	12%	11%	11%	13%	16%	8%	10%	11%	6%	7%	18%	14%	11%	9%	10%	16%
	Very important	5%	2%	7%	6%	5%	5%	4%	9%	0%	11%	6%	4%	4%	0%	5%	6%
Talking to friends/family	Not at all important	4%	4%	3%	4%	5%	5%	4%	3%	0%	0%	4%	8%	2%	3%	5%	3%
	Not very important	8%	7%	8%	9%	10%	14%	4%	3%	0%	9%	2%	7%	9%	12%	9%	7%
	Neutral	19%	16%	24%	16%	18%	24%	22%	14%	25%	13%	12%	12%	29%	21%	19%	16%
	Somewhat important	40%	40%	41%	41%	41%	36%	35%	46%	25%	29%	49%	44%	35%	50%	44%	35%
	Very important	29%	33%	25%	30%	26%	22%	35%	34%	50%	49%	33%	29%	24%	15%	23%	39%

Advisor Tables

All Advisors	Negative Stress Categories			Assets Under Management					Advisor Age					Advisor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<35	35-44	45-54	55-64	65+	Male	Female

Defining and Dealing with Stress

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

Use of stress management programs/resources	Not at all important	32%	36%	32%	29%	27%	36%	33%	40%	50%	27%	16%	36%	37%	35%	34%	28%
	Not very important	19%	18%	21%	18%	21%	25%	10%	23%	19%	11%	41%	18%	14%	18%	17%	21%
	Neutral	33%	30%	33%	34%	39%	27%	43%	20%	6%	47%	24%	29%	33%	35%	32%	34%
	Somewhat important	12%	12%	10%	12%	8%	10%	8%	17%	25%	11%	12%	13%	9%	12%	12%	9%
	Very important	5%	4%	4%	6%	5%	2%	6%	0%	0%	4%	6%	4%	7%	0%	4%	7%
Taking small breaks throughout the day	Not at all important	8%	9%	6%	9%	7%	7%	10%	11%	13%	4%	6%	8%	8%	12%	8%	6%
	Not very important	9%	8%	10%	9%	9%	8%	12%	11%	0%	0%	10%	12%	9%	12%	7%	11%
	Neutral	19%	19%	16%	21%	19%	22%	20%	11%	31%	24%	4%	18%	22%	26%	20%	17%
	Somewhat important	42%	44%	44%	37%	43%	39%	39%	43%	38%	44%	45%	44%	39%	32%	43%	39%
	Very important	23%	21%	24%	24%	22%	24%	20%	23%	19%	27%	35%	19%	21%	18%	22%	26%
Breathing exercises	Not at all important	21%	25%	23%	17%	14%	25%	20%	37%	38%	18%	14%	22%	23%	29%	26%	14%
	Not very important	12%	13%	11%	10%	19%	5%	8%	14%	13%	18%	24%	11%	4%	6%	14%	8%
	Neutral	27%	26%	29%	24%	22%	36%	31%	17%	19%	24%	20%	29%	27%	29%	29%	21%
	Somewhat important	26%	21%	25%	31%	29%	25%	25%	20%	25%	27%	22%	27%	29%	18%	22%	35%
	Very important	14%	14%	11%	17%	16%	8%	16%	11%	6%	13%	18%	11%	16%	18%	10%	22%

Advisor Tables

All Advisors	Negative Stress Categories			Assets Under Management					Advisor Age					Advisor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<35	35-44	45-54	55-64	65+	Male	Female

Defining and Dealing with Stress

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

Writing/journaling	Not at all important	31%	30%	28%	35%	25%	44%	31%	40%	31%	27%	22%	34%	29%	47%	35%	26%
	Not very important	22%	18%	28%	19%	22%	19%	20%	23%	50%	31%	31%	19%	18%	15%	22%	22%
	Neutral	23%	24%	24%	22%	25%	17%	27%	20%	19%	20%	14%	27%	28%	21%	23%	21%
	Somewhat important	17%	22%	13%	16%	18%	17%	16%	6%	0%	13%	24%	12%	19%	15%	16%	18%
	Very important	7%	7%	7%	8%	10%	3%	6%	11%	0%	9%	8%	8%	5%	3%	4%	12%
Prioritizing activities	Not at all important	1%	1%	3%	0%	2%	0%	2%	0%	0%	7%	0%	0%	0%	3%	2%	1%
	Not very important	1%	0%	1%	3%	2%	2%	0%	0%	0%	0%	2%	4%	0%	0%	1%	2%
	Neutral	9%	9%	8%	10%	12%	3%	2%	11%	13%	11%	6%	8%	8%	15%	12%	3%
	Somewhat important	42%	36%	47%	43%	41%	44%	41%	40%	50%	40%	57%	33%	44%	41%	44%	37%
	Very important	46%	54%	42%	44%	43%	51%	55%	49%	38%	42%	35%	55%	47%	41%	41%	57%

Advisor Tables

All Advisors	Negative Stress Categories			Assets Under Management					Advisor Age					Advisor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<35	35-44	45-54	55-64	65+	Male	Female

Advisor Profile Details

Which of the following best describes your role?	CEO / President	29%	33%	28%	26%	32%	27%	29%	29%	19%	11%	27%	28%	37%	35%	34%	22%
	Senior Financial Advisor	49%	43%	53%	50%	39%	66%	67%	54%	56%	22%	47%	55%	56%	56%	48%	51%
	All other	22%	24%	19%	24%	29%	7%	4%	17%	25%	67%	27%	16%	7%	9%	18%	26%
For how many years have you worked in the financial services industry?	<1	4%	3%	4%	3%	4%	0%	2%	0%	0%	13%	4%	1%	1%	3%	3%	4%
	1-2	5%	5%	3%	6%	6%	0%	0%	0%	19%	16%	8%	4%	1%	0%	4%	6%
	3-4	6%	5%	7%	7%	12%	2%	2%	0%	6%	20%	8%	4%	2%	0%	6%	7%
	5-9	12%	14%	10%	10%	21%	10%	4%	6%	0%	40%	16%	5%	6%	0%	11%	13%
	10-14	13%	9%	14%	16%	15%	14%	6%	17%	6%	11%	27%	18%	7%	3%	12%	15%
	15-19	10%	9%	11%	9%	11%	12%	8%	9%	19%	0%	24%	11%	4%	15%	9%	11%
	20+	50%	54%	51%	47%	31%	63%	78%	69%	50%	0%	12%	59%	78%	79%	54%	44%
Today, what are your current assets under management?	<\$50M	40%	40%	40%	39%	100%	0%	0%	0%	0%	62%	56%	32%	31%	31%	37%	45%
	\$50M - \$99.9M	22%	23%	18%	25%	0%	100%	0%	0%	0%	18%	10%	23%	27%	25%	25%	16%
	\$100 - \$249.9M	19%	18%	18%	21%	0%	0%	100%	0%	0%	6%	15%	18%	25%	28%	22%	15%
	\$250 - \$499.9M	13%	13%	16%	10%	0%	0%	0%	100%	0%	6%	13%	24%	7%	13%	13%	14%
	\$500M+	6%	5%	8%	5%	0%	0%	0%	0%	100%	9%	5%	3%	10%	3%	4%	10%

Advisor Tables

All Advisors	Negative Stress Categories			Assets Under Management					Advisor Age					Advisor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<35	35-44	45-54	55-64	65+	Male	Female

Advisor Profile Details

What was your gross revenue generated in your business in the last 12 months? Please respond for your individual book of business.	<\$250K	37%	40%	36%	36%	80%	9%	6%	6%	8%	58%	47%	32%	27%	41%	36%	40%
	\$250K - \$499.9K	21%	19%	22%	21%	18%	47%	11%	6%	8%	26%	14%	28%	20%	13%	21%	20%
	\$500K - \$999.9K	19%	17%	15%	23%	0%	41%	40%	10%	0%	6%	16%	14%	24%	28%	20%	15%
	\$1M - \$2.49M	17%	18%	18%	15%	2%	3%	40%	58%	15%	6%	16%	24%	18%	13%	18%	16%
	\$2.5M+	6%	6%	9%	4%	0%	0%	2%	19%	69%	3%	7%	3%	11%	6%	5%	9%
With how many client households does your team work? Please respond for your individual book of business.	<50	27%	27%	25%	29%	50%	17%	4%	3%	13%	38%	41%	22%	21%	24%	25%	30%
	50 - 99	23%	20%	25%	22%	19%	36%	22%	23%	6%	16%	20%	21%	29%	18%	22%	23%
	100 - 249	29%	35%	28%	26%	23%	36%	43%	31%	38%	22%	16%	34%	32%	38%	32%	26%
	250 - 499	13%	9%	16%	13%	6%	7%	20%	23%	25%	18%	12%	12%	13%	12%	11%	15%
	500+	8%	9%	6%	9%	3%	5%	12%	20%	19%	7%	10%	11%	5%	9%	10%	5%
How has the revenue generated in your business/practice changed in 2015-2016?	Decrease	4%	2%	4%	6%	4%	9%	2%	3%	0%	0%	0%	5%	8%	3%	4%	4%
	No change	15%	21%	12%	12%	28%	7%	2%	0%	0%	36%	27%	12%	4%	13%	13%	18%
	1% - 10% increase	47%	37%	49%	52%	27%	47%	53%	64%	100%	30%	34%	45%	55%	65%	50%	41%
	11% - 20% increase	22%	28%	20%	20%	21%	26%	34%	24%	0%	24%	24%	26%	21%	13%	22%	24%
	>20% increase	12%	11%	13%	10%	20%	11%	9%	9%	0%	9%	15%	12%	12%	6%	11%	14%

Advisor Tables

All Advisors	Negative Stress Categories			Assets Under Management					Advisor Age					Advisor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<35	35-44	45-54	55-64	65+	Male	Female

Advisor Profile Details

How has the revenue generated in your business/practice changed in 2016-2017?	Decrease	5%	6%	2%	6%	6%	4%	4%	0%	0%	0%	0%	5%	7%	9%	5%	5%
	No change	11%	14%	9%	11%	19%	7%	0%	0%	0%	27%	21%	8%	4%	13%	10%	13%
	1% - 10% increase	41%	37%	51%	36%	24%	49%	44%	61%	67%	27%	24%	42%	50%	53%	45%	34%
	11% - 20% increase	26%	29%	22%	27%	23%	28%	42%	24%	27%	24%	29%	30%	24%	22%	26%	26%
	>20% increase	17%	13%	16%	20%	28%	12%	10%	15%	7%	21%	26%	16%	15%	3%	14%	22%
How has the revenue generated in your business/practice changed in 2017-2018?	Decrease	7%	2%	6%	11%	11%	9%	2%	0%	0%	3%	9%	9%	5%	6%	5%	9%
	No change	7%	8%	9%	6%	6%	4%	6%	6%	0%	11%	9%	5%	6%	9%	8%	6%
	1% - 10% increase	41%	42%	41%	40%	27%	42%	48%	61%	69%	23%	23%	45%	46%	59%	40%	43%
	11% - 20% increase	23%	27%	23%	20%	18%	28%	31%	24%	31%	26%	18%	21%	30%	13%	28%	14%
	>20% increase	22%	21%	22%	23%	38%	18%	13%	9%	0%	37%	41%	21%	12%	13%	19%	28%
Including yourself, how many people are on your team?	1	19%	18%	17%	21%	37%	7%	10%	0%	0%	22%	27%	13%	17%	18%	20%	17%
	2-3	40%	33%	42%	44%	42%	59%	47%	20%	6%	33%	31%	46%	44%	41%	40%	38%
	4-5	19%	20%	20%	19%	11%	22%	31%	29%	13%	18%	24%	13%	21%	24%	21%	18%
	6+	22%	30%	22%	16%	9%	12%	12%	51%	81%	27%	18%	28%	18%	18%	19%	26%

Advisor Tables

All Advisors	Negative Stress Categories			Assets Under Management					Advisor Age					Advisor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<35	35-44	45-54	55-64	65+	Male	Female

Advisor Profile Details

Asset growth	No goals of this type for 2018	17%	22%	16%	15%	14%	12%	12%	6%	19%	22%	24%	15%	13%	18%	16%	19%
	Did not meet your goal(s)	20%	15%	19%	26%	25%	24%	24%	11%	13%	9%	16%	20%	24%	32%	24%	14%
	Partially met your goal(s)	38%	38%	32%	42%	43%	37%	39%	49%	31%	44%	33%	36%	39%	32%	36%	41%
	Met your goal(s) completely	25%	24%	33%	17%	18%	27%	25%	34%	38%	24%	27%	28%	24%	18%	24%	26%
Revenue growth	No goals of this type for 2018	12%	11%	11%	15%	9%	8%	12%	6%	19%	20%	18%	12%	7%	9%	12%	13%
	Did not meet your goal(s)	17%	13%	16%	21%	24%	20%	14%	9%	6%	4%	22%	16%	18%	21%	20%	12%
	Partially met your goal(s)	41%	41%	37%	44%	44%	37%	45%	43%	31%	56%	31%	40%	38%	44%	40%	43%
	Met your goal(s) completely	30%	35%	36%	21%	23%	34%	29%	43%	44%	20%	29%	32%	37%	26%	28%	32%

Advisor Tables

All Advisors	Negative Stress Categories			Assets Under Management					Advisor Age					Advisor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<35	35-44	45-54	55-64	65+	Male	Female

Advisor Profile Details

To what extent did you meet your business goals for 2018?

Average size of client's assets	No goals of this type for 2018	29%	36%	26%	27%	25%	29%	25%	23%	19%	29%	39%	32%	23%	26%	30%	29%
	Did not meet your goal(s)	12%	9%	15%	13%	17%	12%	10%	3%	13%	13%	10%	13%	12%	18%	14%	10%
	Partially met your goal(s)	34%	26%	31%	41%	40%	32%	41%	34%	25%	40%	27%	33%	35%	32%	34%	32%
	Met your goal(s) completely	25%	29%	27%	19%	18%	27%	24%	40%	44%	18%	24%	22%	31%	24%	22%	28%
Client satisfaction	No goals of this type for 2018	19%	16%	19%	22%	15%	17%	18%	20%	13%	20%	20%	20%	20%	15%	20%	18%
	Did not meet your goal(s)	3%	2%	2%	4%	4%	0%	4%	3%	0%	2%	4%	1%	4%	3%	3%	3%
	Partially met your goal(s)	33%	26%	32%	38%	36%	41%	31%	29%	19%	31%	33%	36%	27%	38%	35%	30%
	Met your goal(s) completely	45%	55%	47%	36%	45%	42%	47%	49%	69%	47%	43%	42%	48%	44%	42%	49%
Team satisfaction	No goals of this type for 2018	23%	23%	25%	22%	27%	20%	18%	14%	19%	29%	24%	24%	22%	15%	25%	21%
	Did not meet your goal(s)	10%	8%	9%	12%	15%	8%	6%	9%	0%	13%	8%	8%	12%	9%	12%	6%
	Partially met your goal(s)	36%	30%	34%	44%	33%	39%	45%	49%	25%	31%	20%	46%	40%	38%	38%	37%
	Met your goal(s) completely	30%	40%	32%	22%	25%	32%	31%	29%	56%	27%	47%	22%	26%	38%	26%	36%
Personal health	No goals of this type for 2018	6%	3%	8%	6%	5%	7%	4%	3%	6%	2%	2%	9%	4%	6%	5%	6%
	Did not meet your goal(s)	31%	11%	32%	47%	36%	22%	27%	37%	38%	38%	43%	38%	23%	15%	28%	38%
	Partially met your goal(s)	42%	42%	42%	41%	38%	44%	51%	40%	38%	44%	31%	39%	49%	44%	45%	38%
	Met your goal(s) completely	21%	44%	18%	6%	22%	27%	18%	20%	19%	16%	24%	14%	23%	35%	22%	18%

Advisor Tables

All Advisors	Negative Stress Categories			Assets Under Management					Advisor Age					Advisor Gender	
	Low Negative Stress	Moderate Negative Stress	High Negative Stress	<\$50M	\$50M - \$99.9M	\$100 - \$249.9M	\$250 - \$499.9M	\$500M+	<35	35-44	45-54	55-64	65+	Male	Female

Advisor Profile Details

To what extent did you meet your business goals for 2018?

Personal relationships	No goals of this type for 2018	10%	10%	12%	9%	11%	12%	10%	3%	13%	7%	6%	13%	8%	15%	12%	8%
	Did not meet your goal(s)	17%	5%	10%	33%	19%	20%	14%	6%	13%	13%	20%	21%	18%	9%	15%	20%
	Partially met your goal(s)	45%	34%	54%	45%	43%	37%	49%	57%	56%	47%	49%	41%	48%	35%	46%	45%
	Met your goal(s) completely	28%	51%	24%	14%	26%	31%	27%	34%	19%	33%	24%	25%	25%	41%	28%	27%
Personal finances	No goals of this type for 2018	4%	5%	4%	4%	1%	7%	4%	6%	6%	2%	2%	9%	3%	3%	4%	4%
	Did not meet your goal(s)	19%	7%	12%	34%	24%	20%	14%	11%	6%	18%	20%	18%	18%	15%	19%	18%
	Partially met your goal(s)	44%	36%	55%	41%	55%	34%	43%	40%	44%	56%	43%	41%	43%	47%	45%	45%
	Met your goal(s) completely	33%	52%	29%	21%	21%	39%	39%	43%	44%	24%	35%	32%	36%	35%	32%	32%

STUDY:

The War on Stress 2019

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