

**Table 1: Descriptive Statistics**

Questions	N	%	M	SD	Min	Max
<i>Client Trust Scale</i>						
I have confidence in my financial planner's recommendations.	611	-	3.27	0.82	0	4
I have confidence in my financial planner's integrity.	611	-	3.35	0.85	0	4
I have confidence in my financial planner's financial skills and expertise.	611	-	3.34	0.87	0	4
I can rely on my financial planner to follow through on their commitments.	610	-	3.38	0.87	0	4
I trust my financial planner to act in my best interests.	610	-	3.35	0.81	0	4
<i>Client Commitment Scale</i>						
Would switch planners for a better communicator	611	-	2.70	1.23	0	4
Would switch planners for higher rate of return	611	-	2.12	1.33	0	4
Would switch planners for someone who keeps in touch with me and updates on progress toward goals	610	-	2.54	1.28	0	4
<i>Client Satisfaction</i>						
	611	-	3.30	0.81	0	4
<i>Means of Communication</i>						
No communication between meetings	64	10.49	-	-	0	1
Only one or two methods of mass communication	71	11.64	-	-	0	1
Only personalized emails or texts	98	16.07	-	-	0	1
Only phone calls	104	17.05	-	-	0	1
Personalized email or text and one mass communication	43	7.05	-	-	0	1
Phone calls and one mass communication	35	5.74	-	-	0	1
Phone calls and personalized emails or texts	116	19.02	-	-	0	1
Three or more methods of communication	79	12.95	-	-	0	1
<i>In-person Meeting Frequency</i>						
Never or inconsistently	67	10.89	-	-	0	1
Annual	59	9.59	-	-	0	1
More than once a year	318	51.71	-	-	0	1
Monthly	171	27.80	-	-	0	1
<i>Virtual Meeting Frequency</i>						
Never or inconsistently	77	12.58	-	-	0	1
Annual	294	48.04	-	-	0	1
More than once a year	125	20.42	-	-	0	1
Monthly	116	18.95	-	-	0	1
<i>Web of Support</i>						
Decreases worry	545	-	2.69	0.91	0	4
Shows planner cares	545	-	2.97	0.87	0	4
Keeps plan at forefront	545	-	2.82	0.89	0	4
Increases financial knowledge	545	-	2.88	0.88	0	4
Keeps clients on track	544	-	2.97	0.88	0	4
Increases trust in planner	544	-	3.01	0.87	0	4
<i>Financial Anxiety Scale (Never to Always)</i>						
I feel anxious about my financial situation.	619	-	1.35	1.09	0	4
I have difficulty sleeping because of my financial situation.	619	-	0.81	1.01	0	4
I have difficulty concentrating on my studies/work because of my financial situation.	619	-	0.74	1.07	0	4
I am irritable because of my financial situation.	619	-	0.88	1.09	0	4
I have difficulty controlling my worries about my financial situation.	619	-	0.92	1.10	0	4
My muscles feel tense because of worries about my financial situation.	619	-	0.69	1.02	0	4
I feel fatigued because I worry about my financial situation.	619	-	0.81	1.10	0	4
<i>Age</i>	621	-	51.98	16.61	18	89
<i>Gender</i>						
Female	300	48.47	-	-	0	1
Male	319	51.53	-	-	0	1
<i>Income</i>						
\$0-\$50,000	125	20.16	-	-	0	1
\$50,000-\$99,999	210	33.87	-	-	0	1
\$100,000-\$149,999	173	27.90	-	-	0	1
\$150,000-\$249,999	80	12.90	-	-	0	1
\$250,000-\$499,999	32	5.16	-	-	0	1