Table 1: Descriptive Statistics

Variable	Category	Count	%
Age	18–24	0	0.00%
	25–34	12	8.63%
	35–44	16	11.51%
	45–54	27	19.42%
	55–64	45	32.37%
	65 and Over	39	28.06%
Education	High school graduate or some college	3	2.16%
	College graduate	56	40.29%
	Master's	73	52.52%
	Ph.D.	7	5.04%
Gender	Male	86	61.87%
	Female	52	37.41%
	Other	1	0.72%
Race/Ethnicity	White	122	87.77%
	Black	6	4.32%
	Hispanic	2	1.44%
	Asian	2	1.44%
	Other	4	2.88%
	N/A	3	2.16%
Years as Financial Adviser	<1	4	2.88%
	1–5	19	13.67%
	6–10	20	14.39%
	10 and over	96	69.06%
Certifications	CFP®	82	-
	Other	12	-
	N/A*	3	-
Role	Client-facing adviser	126	90.65%
	Administrative role	1	0.72%
	Compliance	0	0.00%
	Paraplanner	3	2.16%
	Portfolio management	3	2.16%
	Other	6	4.32%
Firm Type	Broker–dealer or wirehouse	27	19.42%
	RIA	89	64.03%
	Trustcompany	2	1.44%
	Other	21	15.11%
Fee Structure	Fee only	70	50.36%
	Commission	6	4.32%
	Hourly	2	1.44%
	Mixed	57	41.01%
	Other	4	2.88%

*Our survey did not have an option for no certification, and these responses were left blank.