Table 1: Topics that Clients and Advisers "Want to Discuss" or "Want to Discuss Again"

Financial Planners		Clients who HAVE discussed		Clients who have NOT discussed	
Client's financial plan for retirement	100%	My financial plan for retirement	84.1%	My financial plan for retirement	68.6%
Client's future goals and aspirations	99.3%	My current housing situation	81.6%	Potential expenses for younger family members	53.2%
Client's potential expenses for their own care	97.3%	Job transition, new career, or retirement	80.3%	Potential expenses for my own care	53.0%