

Table 1: Frequencies of Conducting Qualitative Data Gathering Tasks—A Comparison of 2006 and 2021 Results				
Planner makes effort to learn about...	2006 Results <i>Percent who agreed</i>		2021 Results <i>Percent who agreed</i>	
	Planner	Client	Planner	Client
Cultural values	53%	65%	68%	41%
Personality type/traits	89%	91%	73%	38%
Money attitudes/beliefs	96%	97%	80%	53%
Family history and family values	80%	79%	67%	53%