

Table 2: Sample Statistics—Survey Questions

Question	N	M	SD	Minimum	Maximum
Relationship Termination Costs					
What is your level of satisfaction with the relationship you have with your financial planner?	429	3.74	0.97	1	5
I fully cooperate with my financial planner by following through on all of the financial planning recommendations they make to me.	428	4.89	1.28	1	7
My financial planner keeps in touch with me to see what changes in my life may affect my financial plan.	428	3.29	0.97	1	5
My financial planner educates me about a wide range of financial matters.	428	3.33	1.00	1	5
My financial planner uses a goal setting process that help me identify meaningful personal and financial goals and objectives.	428	3.35	1.00	1	5
Relationship Benefits					
My planner helps me to make good financial decisions.	429	3.60	0.92	1	5
My planner offers good investment advice.	429	3.22	1.04	1	5
My planner shows genuine care and interest in each client's personal circumstances.	429	3.12	1.12	1	5
My financial planner has helped me to achieve my financial goals.	429	3.67	0.81	1	5
My financial planner has helped me to improve my quality of life.	429	3.43	0.94	1	5
My financial planner helps me to identify meaningful personal and financial goals and objectives.	429	3.41	1.00	1	5
Shared Values					
My financial planner presents their own values to me.	429	3.28	0.90	1	5
My financial planner demonstrates knowledge about my culture.	429	3.14	1.04	1	5
My financial planner recognizes limits that cultural differences can place on our relationship.	429	3.49	0.92	1	5
My financial planner is aware of institutional barriers that affect me as their client.	429	3.39	0.93	1	5
Planner makes effort to understand clients' cultural values.	429	3.38	0.85	1	5
Planner makes effort to understand clients' personality.	429	3.03	1.16	1	5
Planner makes effort to understand clients' spending patterns.	429	3.45	1.01	1	5
Planner makes effort to understand clients' attitudes and beliefs about money.	429	3.49	0.98	1	5
Planner makes effort to understand clients' family history and family values.	429	3.50	0.92	1	5
Communications					
My financial planner works hard at asking questions that will encourage me to open up with them.	429	3.38	0.90	1	5
My financial planner paraphrases the factual content of our conversation.	428	3.32	0.95	1	5
My financial planner paraphrases the emotional themes of our planning conversations.	428	3.44	0.81	1	5
My financial planner communicated to me that it is very important to link their financial planning recommendations to my personal goals, needs, and priorities.	428	4.60	1.36	2	7
My financial planner works hard at communicating their recommendations using terms and language that I can easily understand.	428	4.50	1.56	1	7
My financial planner asks me questions to make sure I understand their recommendations.	428	4.90	1.37	2	7
Opportunistic Behavior					
I do not question my financial planner's recommendations.	430	2.68	0.85	1	5
I'm concerned that my financial planner might withhold information that could sway my decisions.*	429	3.08	1.11	1	5
I can trust my financial planner to keep my personal and financial information confidential.	429	3.53	1.00	1	5
My planner provides courteous and friendly service to me.	428	3.42	0.99	1	5
My planner responds promptly to my requests.	429	3.30	1.00	1	5
Trust					
I have confidence in my financial planner's integrity.	429	3.00	1.19	1	5
I have confidence in my financial planner's financial skills and expertise.	429	3.55	1.03	1	5
I can rely on my financial planner to follow through on their commitments.	429	3.45	1.03	1	5
I trust my financial planner.	429	3.35	1.08	1	5
I view my financial planner as a sincere person.	429	3.34	1.15	1	5
Relationship Commitment					
I am very committed to maintaining a relationship with my financial planner.	429	3.46	0.88	1	5
I intend to stay with my financial planner indefinitely.	429	2.90	1.19	1	5
I have a strong sense of loyalty toward my financial planner.	429	3.46	1.01	1	5
I could be persuaded to transfer to a different financial planner.*	429	2.87	1.08	1	5
My financial planner is my primary financial adviser.	429	3.11	1.01	1	5
I put maximum effort into maintaining my relationship with my current financial planner.	429	3.25	1.14	1	5

Missing data handled by listwise deletion for each question

* = Reverse Coded