

## Appendix: All Quantitative Client Responses

"Convey positism [sic]"

"Distance between us and our planner (many states away) makes this optimal"

"Easier to work with my schedule; lack of needing to commute or manage transportation"

"From the comfort of my home I can meet virtually"

"Good"

"I am geographically separated from my financial planner"

"I can be comfortably [sic] in my own home"

"I can meet remotely from my home with my financial planner; and we can do it at any convenient time for both of us"

"I don't have to leave the house, it's personal with being intimidating"

"I don't think anything is lost in a virtual meeting and it's more convenient"

"I feel more comfortable meeting virtually"

"I got used to this method that is very effective"

"I prefer not having to drive to meetings"

"It is more practical and can be done from home"

"It saves time and our advisor is very good at communication via video and email"

"It's easier in a virtual way"

"It's very convenient"

"My financial advisor lives in a different state"

"My financial planner still works in the state I used to live in. We have been meeting in other ways for seven years already"

"My financial planner does not live in my area and in-person meetings would be a challenge. We have always had a virtual meeting process and it works fine"

"My financial planner lives out of state. He specializes in helping widows and I found him after doing a bit of research on his company. His approach to financial planning was attractive enough that I chose to work with him virtually over two financial planners I knew personally and locally. I should add that I generally hate virtual meetings, but his customized approach to finances based on my values and my circumstances was like no one else's approach"

"n"

"NO"

"Opens me up to financial advisors anywhere, not just who is around me. I have the best – who happens to be across the country"

"Our financial planner is in a different state and we have been communicating with him by phone for a number of years already"

"Our schedules are very busy so virtual meeting are [sic] more convenient"

"Planner moved far away"

"Safe"

"Save time"

"The virtual conference is more interesting, and true"

"Time limitations"

"Virtual meetings are easier to schedule and often more efficient"

"Virtual meetings eliminate the need for travel. This allows us to work with our financial planner regardless of where he or we may be"

"We reside in a different state then our financial planner"