

Interactive Polling Results by Question - EPC Holiday Meeting - 12-3-15

1. Select your gender: (Demographic Assignment)

Responses		
	Percent	Count
Female	32.17%	37
Male	67.83%	78
Totals	100%	115

Question Statistics	
Mean	1.68
Median	2.00
Variance	0.22
Standard Deviation	0.47

2. In my family constellation, I am considered a . . . (Demographic Assignment)

Responses		
	Percent	Count
First born	46.90%	53
Middle of the pack	21.24%	24
Last born	31.86%	36
Totals	100%	113

Question Statistics	
Mean	1.85
Median	2.00
Variance	0.76
Standard Deviation	0.87

3. How long have you practiced your profession? (Demographic Assignment)

Responses		
	Percent	Count
0 to 10 years	12.50%	14
11 to 30 years	37.50%	42
30+ years	50.00%	56
Totals	100%	112

Question Statistics	
Mean	2.38
Median	2.50
Variance	0.48
Standard Deviation	0.70

4. Select your profession: (Demographic Assignment)

Responses

	Percent	Count
Accounting	20.00%	23
Finance	20.87%	24
Insurance	12.17%	14
Law	29.57%	34
Trusts	17.39%	20
Totals	100%	115

Question Statistics	
Mean	3.03
Median	3.00
Variance	2.00
Standard Deviation	1.41

5. Do you agree or disagree with the following statement? “As professionals, we cannot be certain o

	Responses	
	Percent	Count
Agree	23.08%	27
Disagree	76.92%	90
Totals	100%	117

Question Statistics	
Mean	1.77
Median	2.00
Variance	0.18
Standard Deviation	0.42

6. Do you agree or disagree with the following statement? It is ethical to choose the lesser of two evils

Responses		
	Percent	Count
Agree	51.28%	60
Disagree	48.72%	57
Totals	100%	117

Question Statistics	
Mean	1.49
Median	1.00
Variance	0.25
Standard Deviation	0.50

7. Choose the statement that reflects your view best. Which is the greater ethical problem in your practice?

Responses		
	Percent	Count
Sloth	23.21%	26
Negligence	41.07%	46
Greed	30.36%	34

Envy	5.36%	6
Totals	100%	112

Question Statistics	
Mean	2.18
Median	2.00
Variance	0.72
Standard Deviation	0.85

8. Which of the following statements best describes how your CLIENTS tend to trust you, their estate

Responses		
	Percent	Count
Trust no matter what	21.55%	25
Trust until proven otherwise	68.10%	79
Trust but verify	10.34%	12
Trust only if no other choice	0.00%	0
Totals	100%	116

Question Statistics	
Mean	1.89
Median	2.00
Variance	0.31
Standard Deviation	0.55

9. Which of the following statements best describes how YOU tend to trust your clients? (Demograp

Responses		
	Percent	Count
Trust no matter what	2.65%	3
Trust until proven otherwise	43.36%	49
Trust but verify	52.21%	59
Trust only if no other choice	1.77%	2
Totals	100%	113

Question Statistics	
Mean	2.53
Median	3.00
Variance	0.34
Standard Deviation	0.58

10. To me, ethics deals mostly with the... (Multiple Choice)

Responses		
	Percent	Count
CONDUCT or ACTIONS we choose freely	61.74%	71
CONSEQUENCES of our free choices/decisions	8.70%	10
INTENTIONS behind our choices	29.57%	34
Totals	100%	115

Question Statistics	
Mean	1.68
Median	1.00
Variance	0.81
Standard Deviation	0.90

11. Succession planning requires the professional to facilitate his or her client through some uncom

Responses	
Percent	Count
Avoid conflict – Stay within the client's comfort zone.	3.51%
Force conflict – Bring the conflict out in the open and try to resolve the issue.	96.49%
Totals	100%
	114

Question Statistics	
Mean	1.96
Median	2.00
Variance	0.03
Standard Deviation	0.18

12. Who's the client? (Multiple Choice)

Responses		
	Percent	Count
Susie	5.56%	6
Stan	0.00%	0
Mr. & Mrs. Smith	81.48%	88
All of the above	12.96%	14
Totals	100%	108

Question Statistics	
Mean	3.02
Median	3.00
Variance	0.35
Standard Deviation	0.59

13. What's more important in this situation? (Multiple Choice)

Responses		
	Percent	Count
Confidentiality of the Smiths' planning	98.25%	112
Relationship with Susie as a client	0.88%	1
Relationship with Stan as a potential client	0.88%	1
Totals	100%	114

Question Statistics	
Mean	1.03
Median	1.00
Variance	0.04
Standard Deviation	0.21

14. With respect to Susie's request for more information, Morgan should ... (Multiple Choice)

Responses		
	Percent	Count
Play dumb	0.00%	0
Not share any information	92.98%	106
Share some information	6.14%	7
Share all information	0.88%	1
Totals	100%	114

Question Statistics	
Mean	2.08
Median	2.00
Variance	0.09
Standard Deviation	0.30

15. Morgan's challenge to Mr. Smith ought to be focused on... (Multiple Choice)

Responses	
Percent	Count

Fairness issue	5.08%	6
Stan's abilities	19.49%	23
Both issues	73.73%	87
No challenge/it is a waste of time	1.69%	2
Totals	100%	118

Question Statistics	
Mean	2.72
Median	3.00
Variance	0.34
Standard Deviation	0.58

16. Morgan should . . . (Multiple Choice)

Responses		
	Percent	Count
Try to make peace in the family	9.43%	10
Withdraw completely	1.89%	2
Suggest changes to the Smiths	78.30%	83
Implement the plan	10.38%	11
Totals	100%	106

Question Statistics

Mean	2.90
Median	3.00
Variance	0.49
Standard Deviation	0.70

17. Liz should . . . (Multiple Choice)

Responses		
	Percent	Count
Touch base with Jane's children	10.81%	12
Revisit the issue with Jane	75.68%	84
Move ahead with Jane's estate plan	10.81%	12
Decline Jane's business	2.70%	3
Totals	100%	111

Question Statistics	
Mean	2.05
Median	2.00
Variance	0.32
Standard Deviation	0.57

18. Liz should . . . (Multiple Choice)

Responses		
	Percent	Count
Suggest an alternate plan	95.15%	98
Refuse to participate	2.91%	3
Draw up the papers	1.94%	2
Drag her feet	0.00%	0

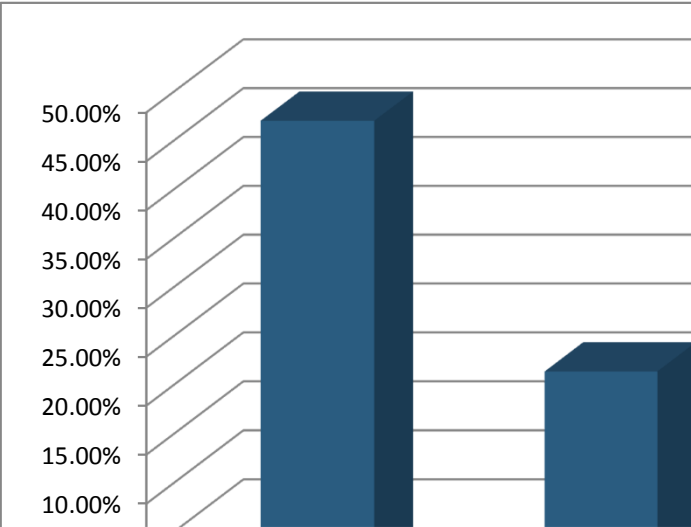
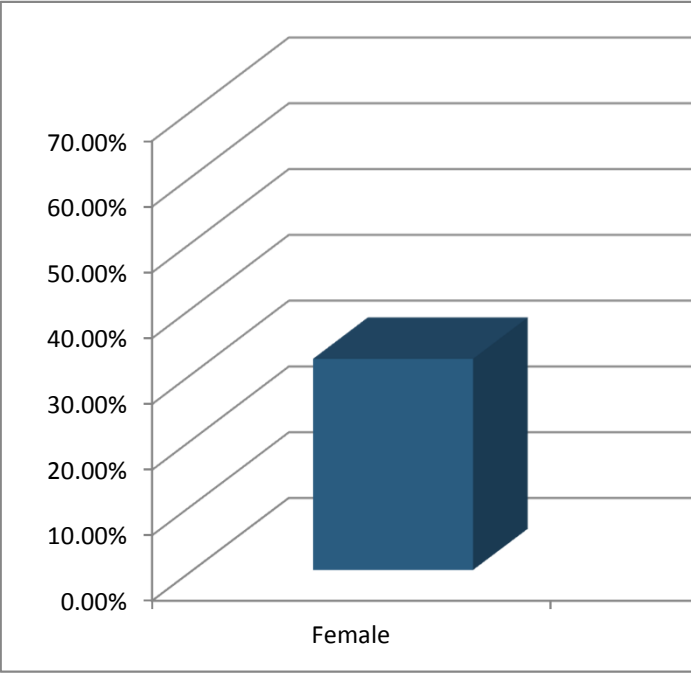
Totals	100%	103
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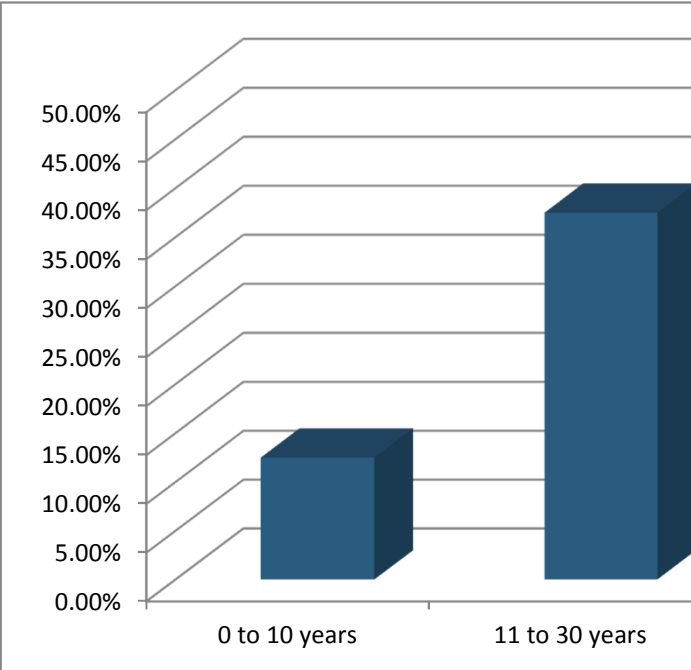
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Median	1.00
Variance	0.10
Standard Deviation	0.32

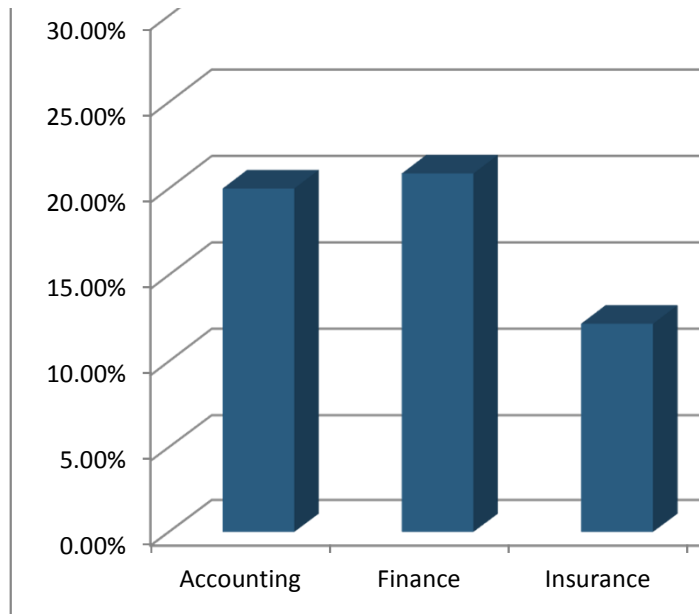
19. Did Liz get it right? (Multiple Choice)

Responses		
	Percent	Count
Yes	40.82%	40
No	33.67%	33
Who's to say?	25.51%	25
Totals	100%	98

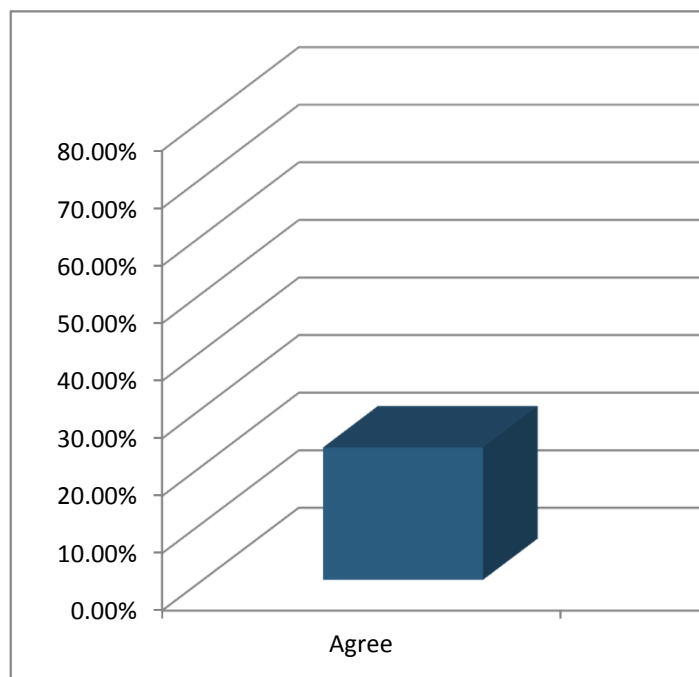
Question Statistics	
Mean	1.85
Median	2.00
Variance	0.64
Standard Deviation	0.80



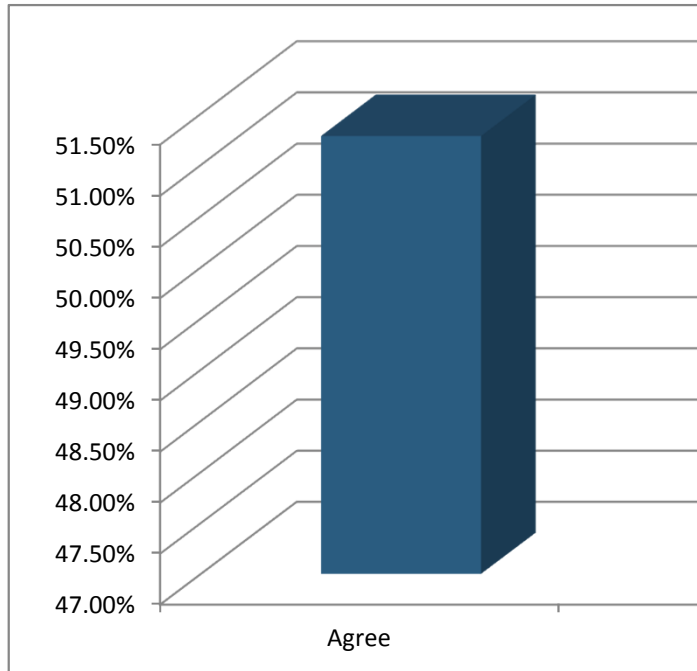




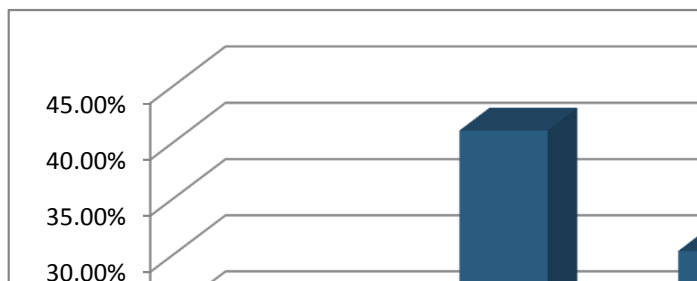
f what is good and bad, right and wrong.” (Multiple Choice)

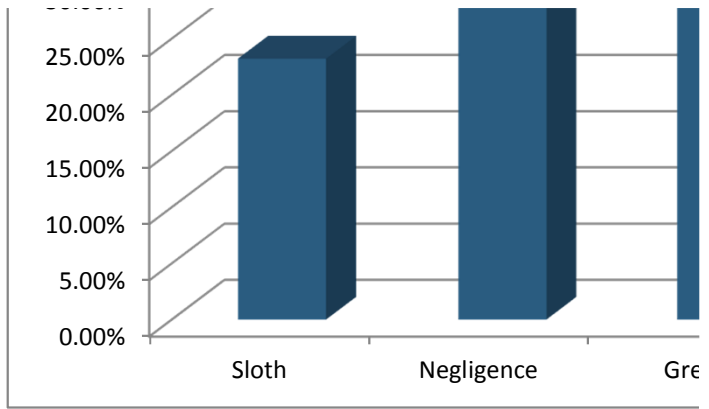


ils when confronted with two bad choices. (Multiple Choice)

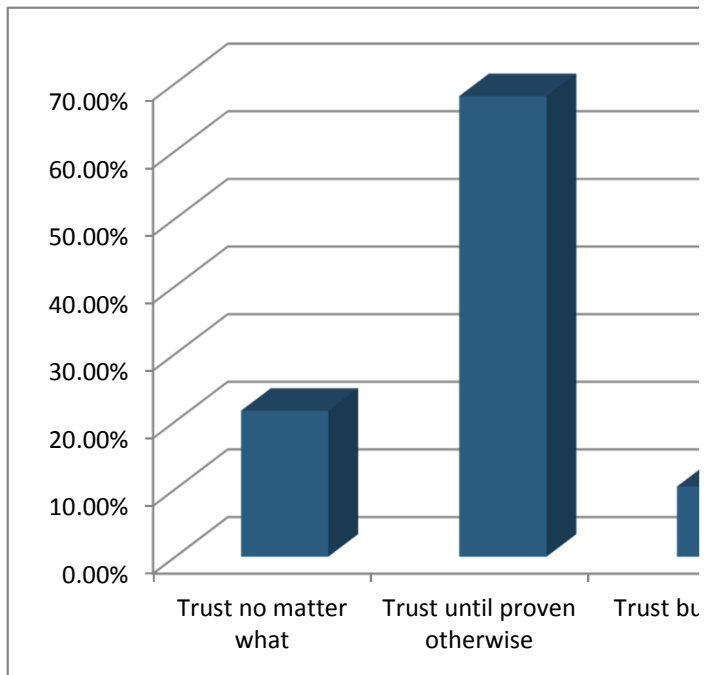


ofession of estate planning? (Multiple Choice)

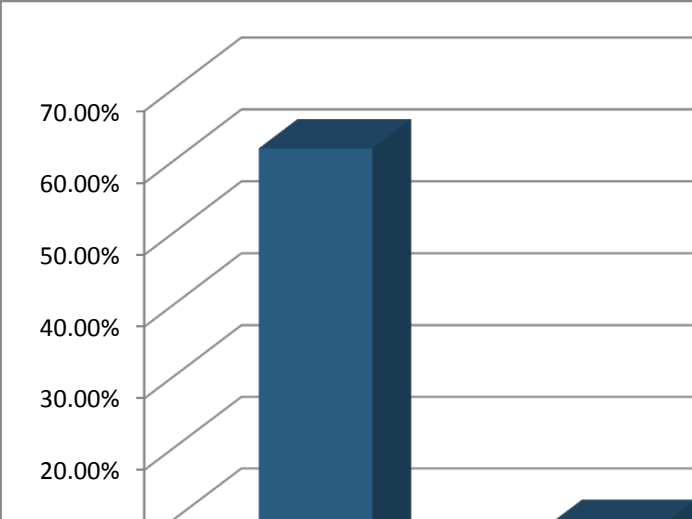
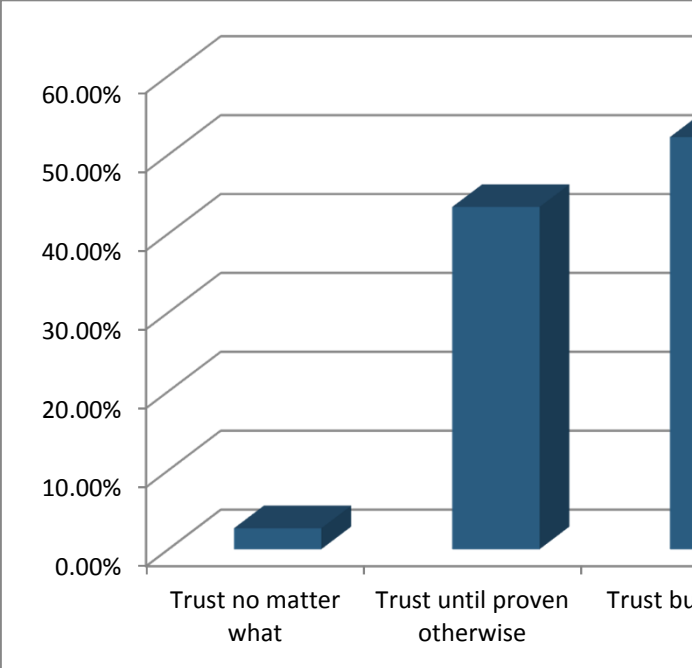


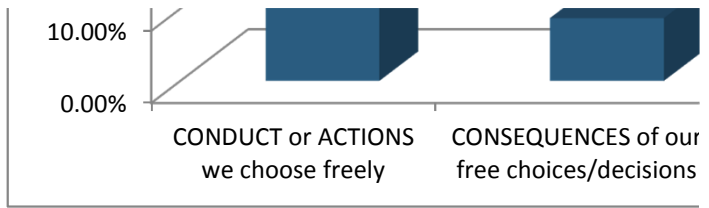


Is a planner? (Demographic Assignment)

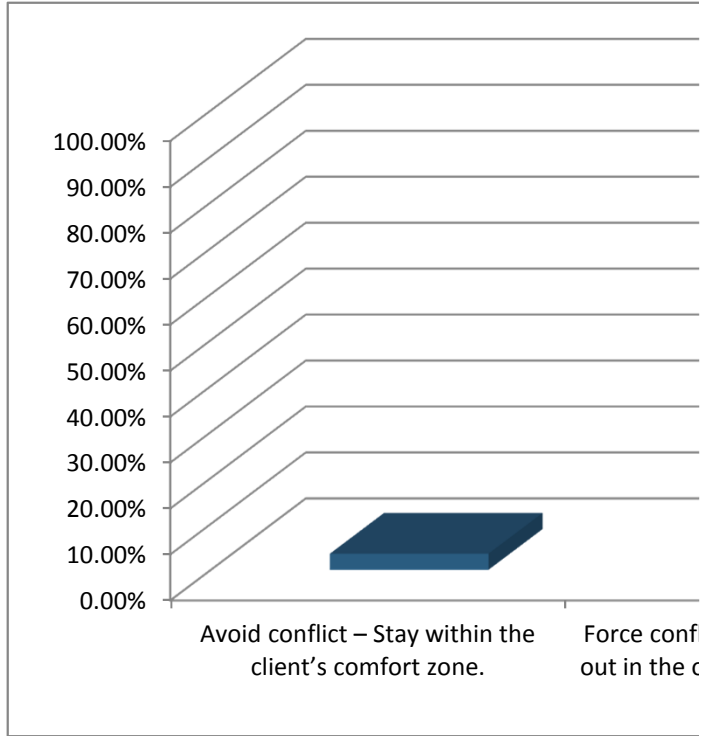


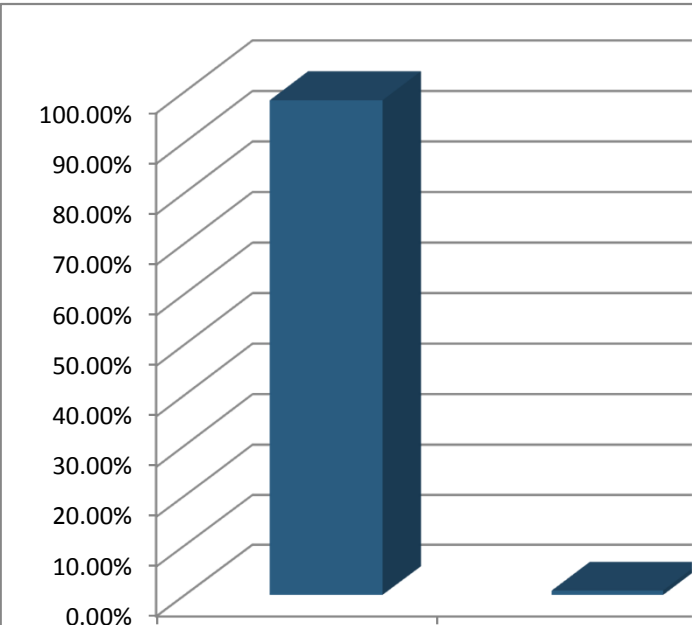
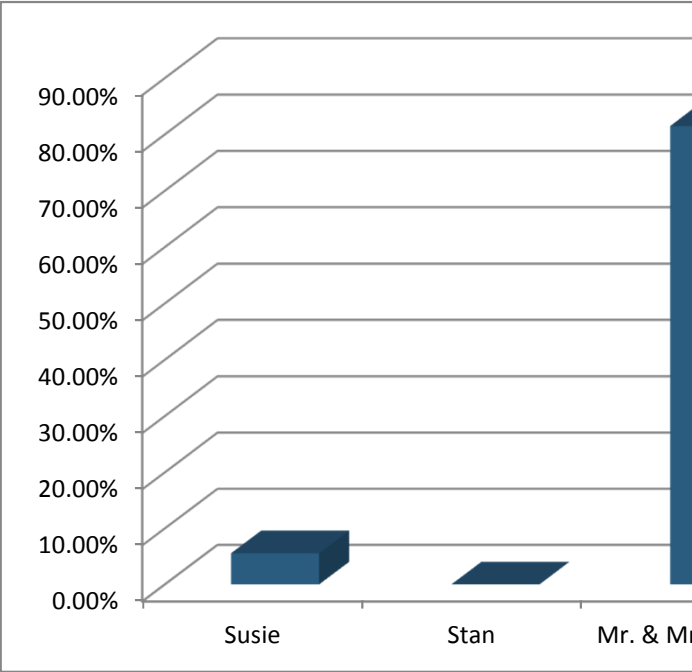
hic Assignment)





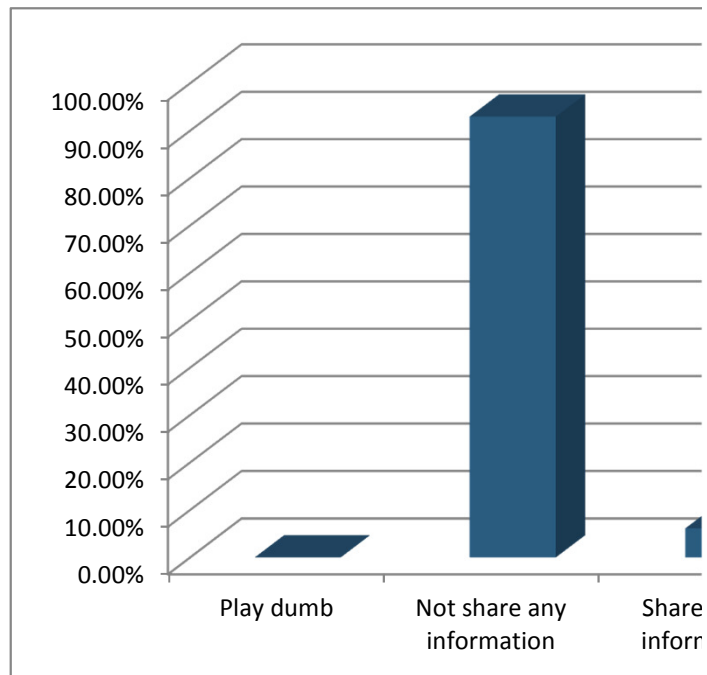
comfortable questions and issues. When facing resistance from the client in addressing these issues, th

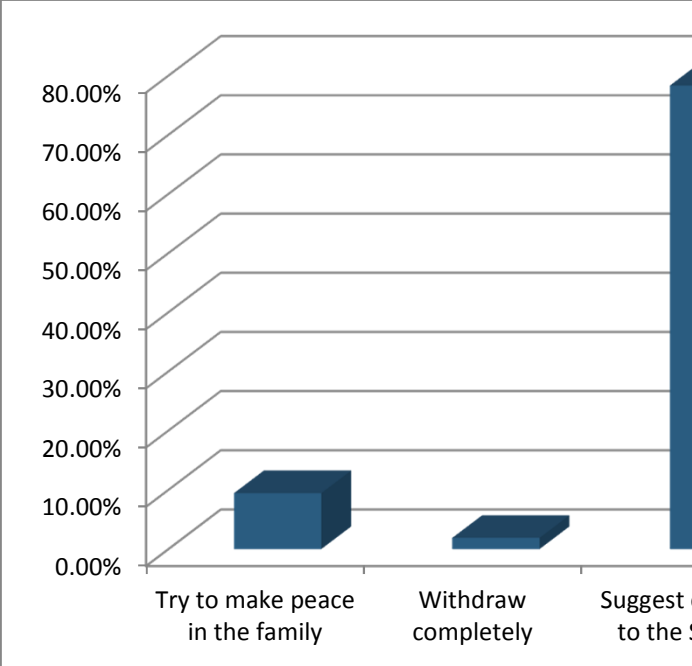
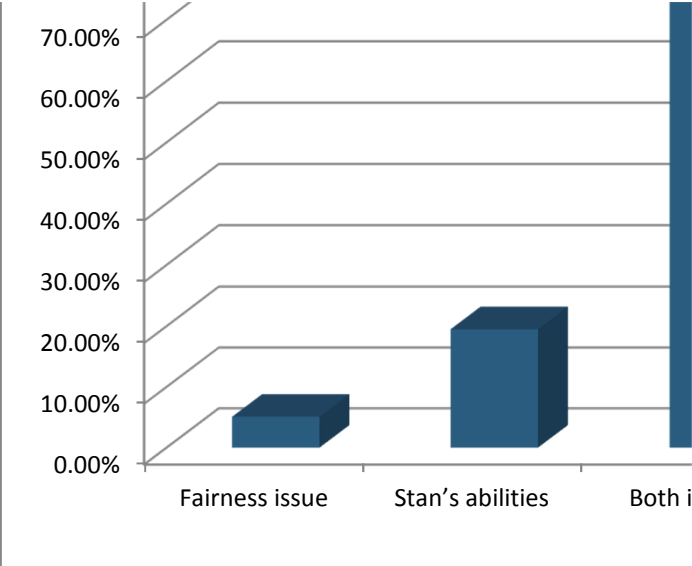


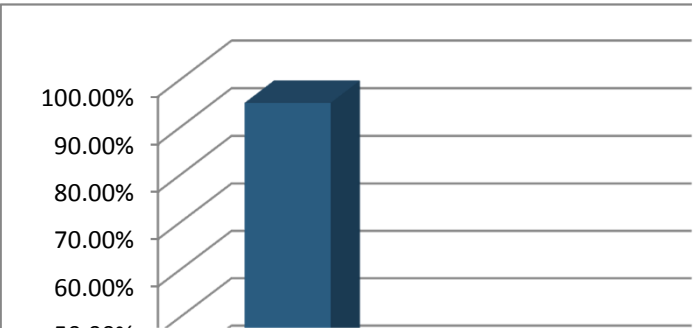
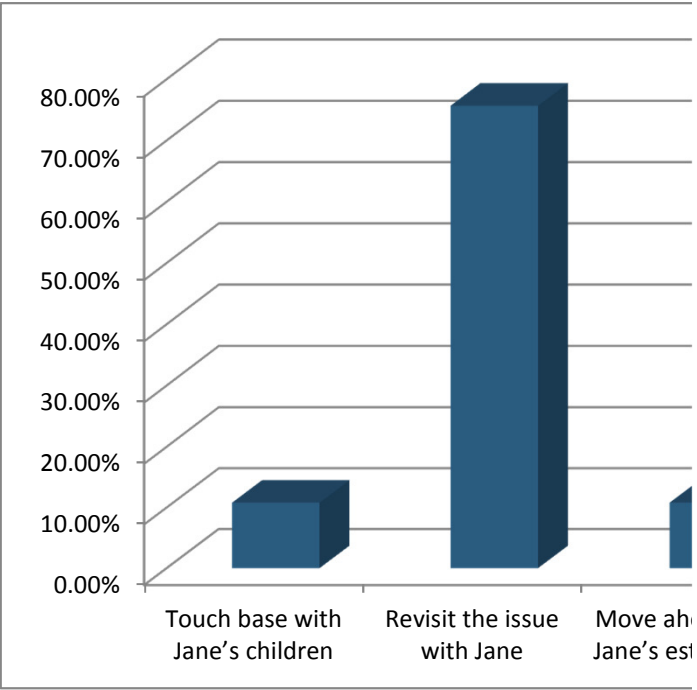


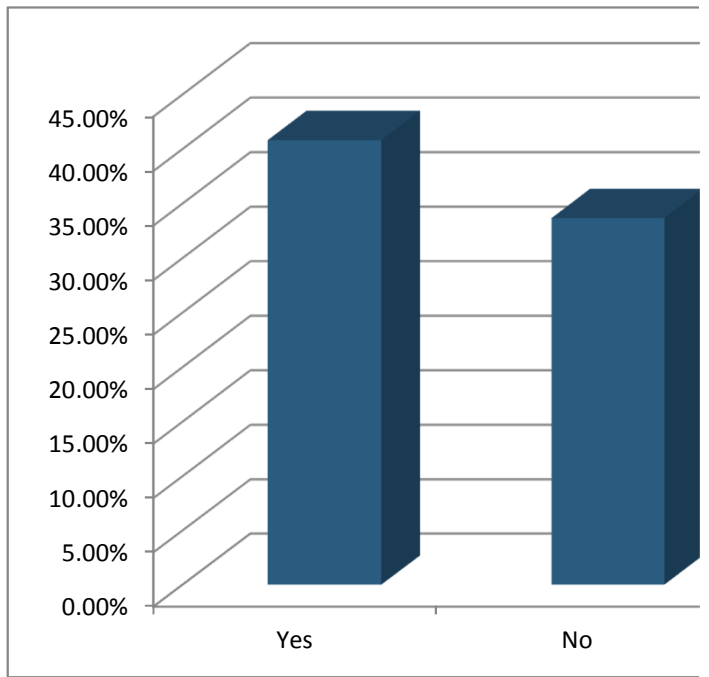
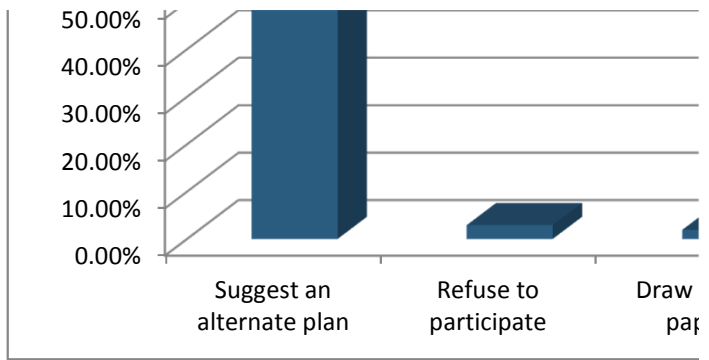
Confidentiality of the Smiths' planning

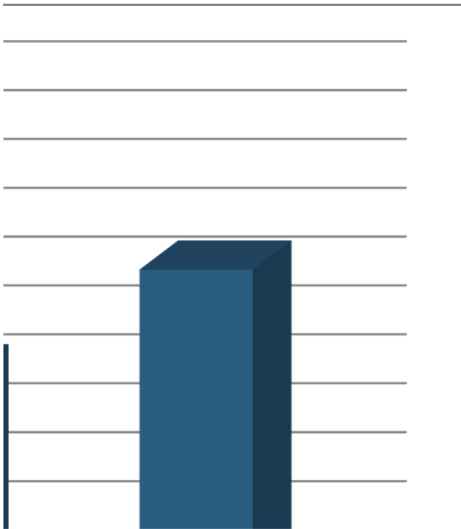
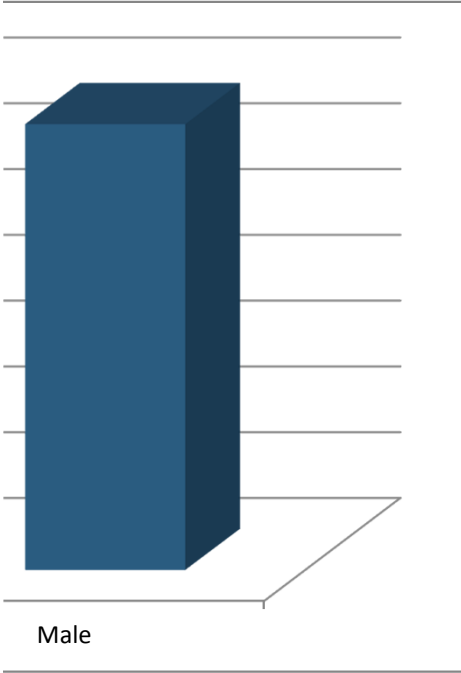
Relationship with Susie as a client

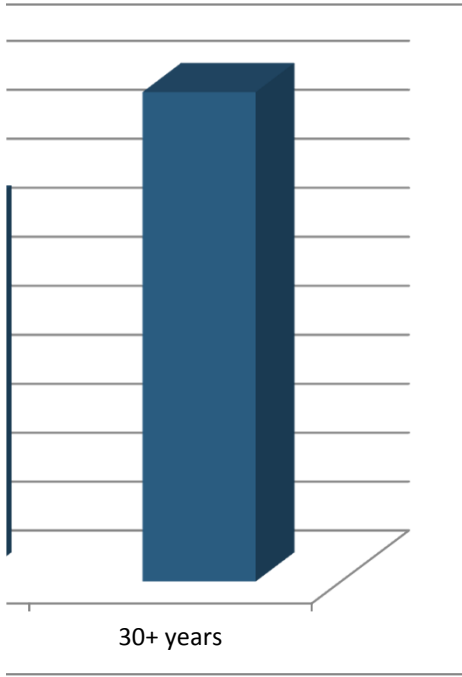
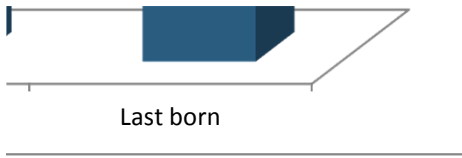


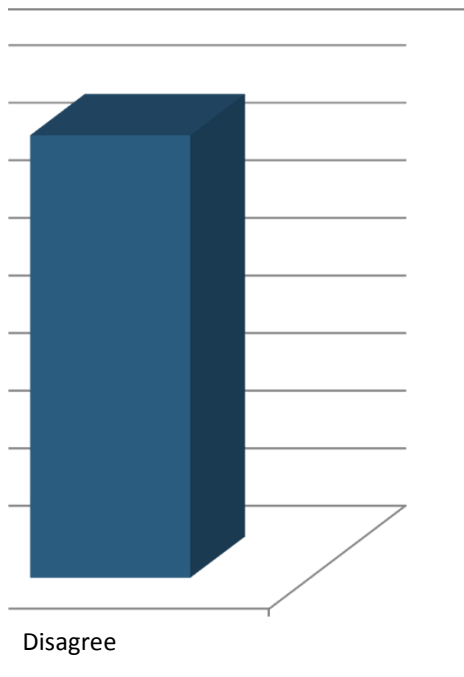
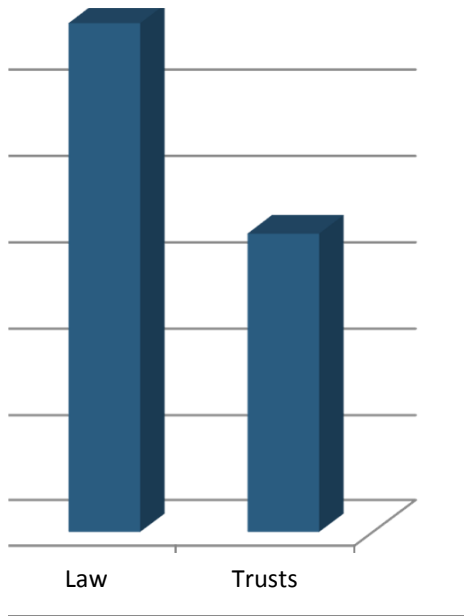


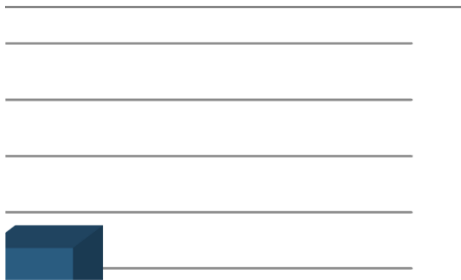
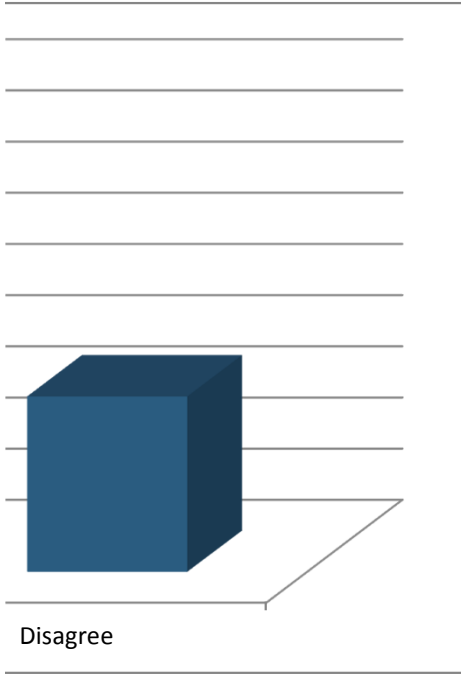


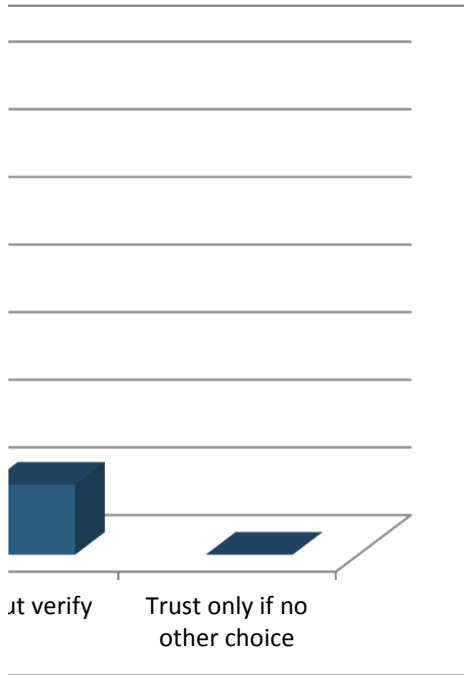
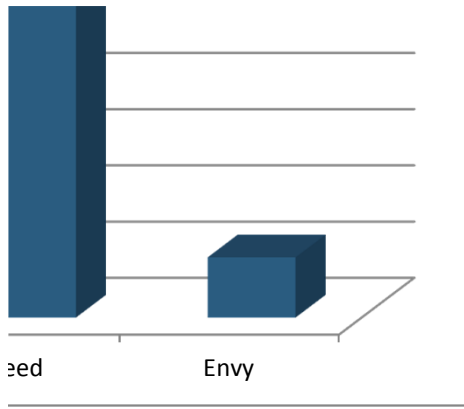


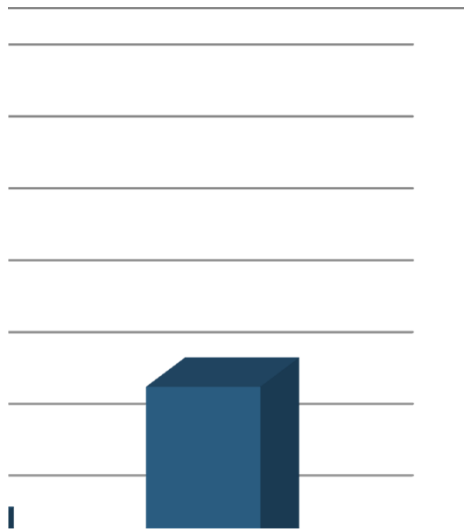
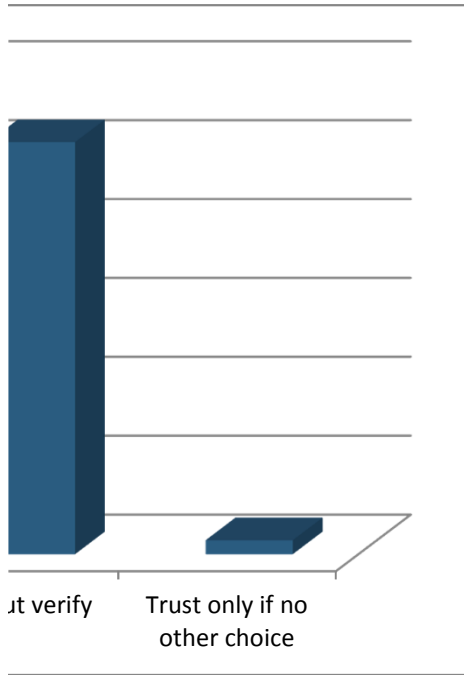


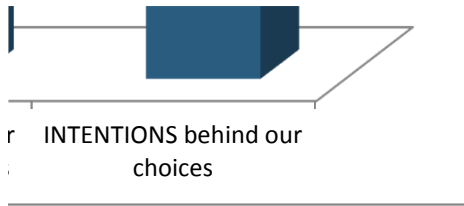




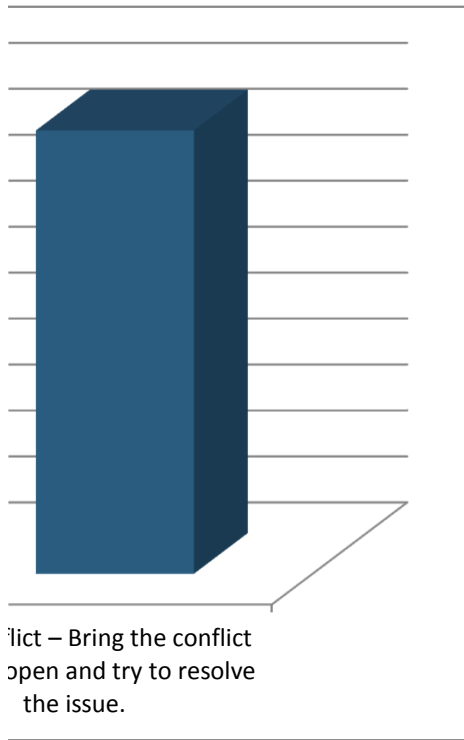


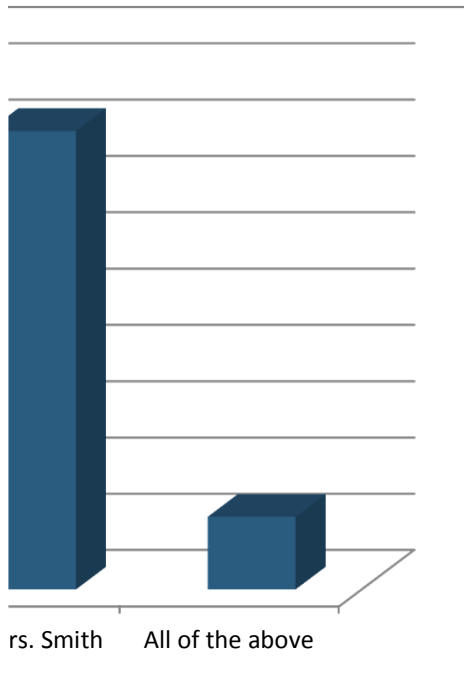




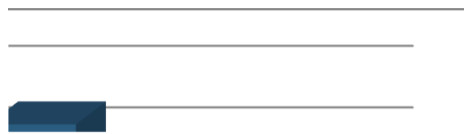
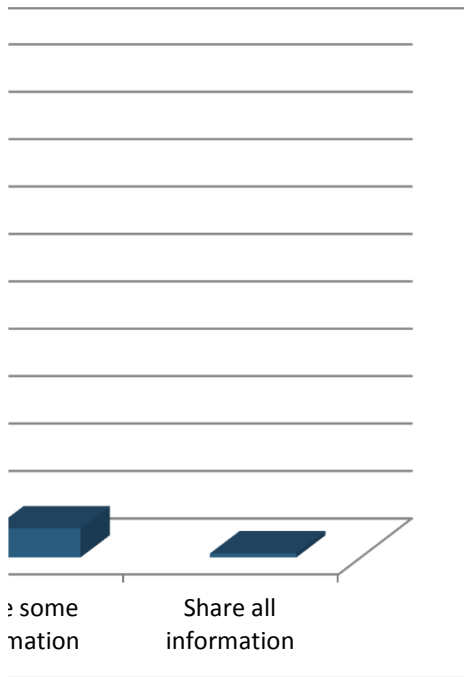


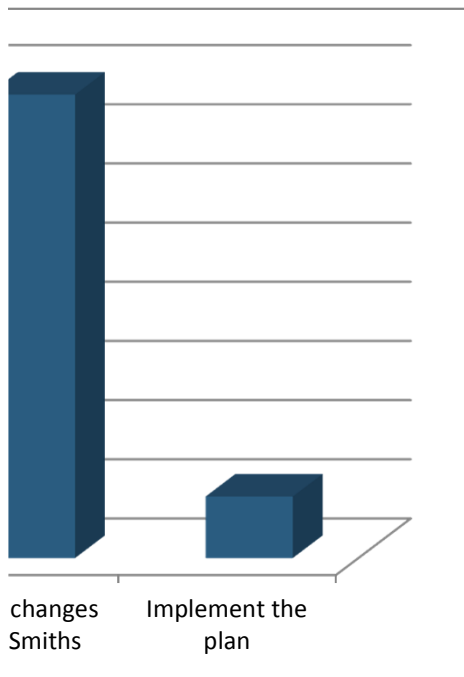
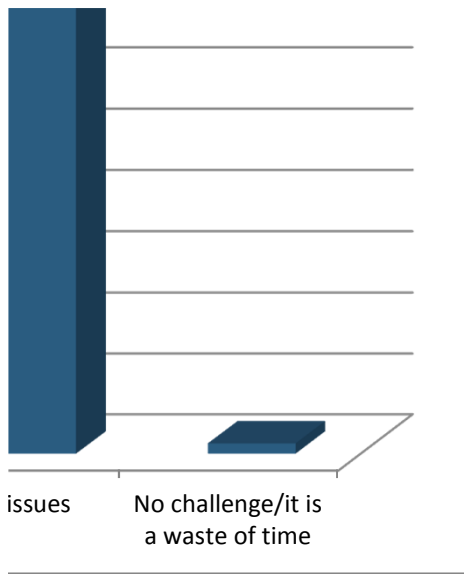
What a typical professional in your field should: (Multiple Choice)

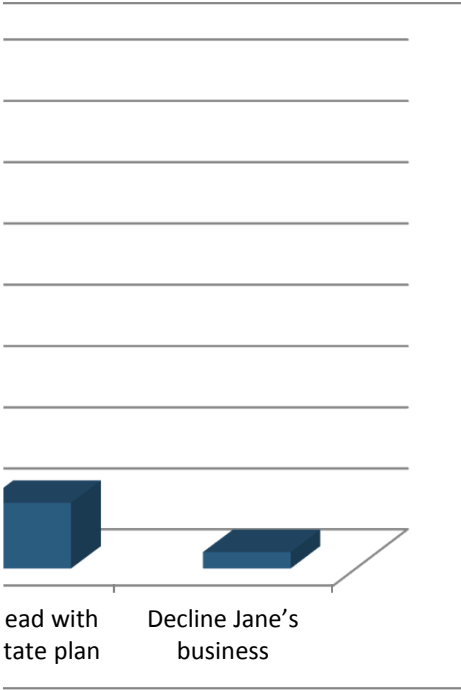




e Relationship with Stan
as a potential client







A rectangular box containing 10 horizontal lines for writing.

