

**CFP Board Pulse Survey:  
CFP<sup>®</sup> Certificant Views of the Current Economic Situation**

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**Survey Respondents: 5,261 CFP<sup>®</sup> Certificants**

**October 9 - 16, 2008**


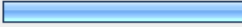
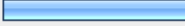





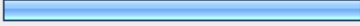

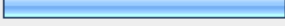
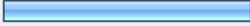

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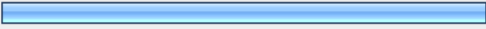





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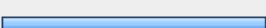



<b>1. As the turbulence with the economy has increased over the past several weeks, have you seen an increase in calls from potential clients?</b>			
		Response Percent	Response Count
Yes - a significant increase		26.7%	1446
<b>Yes - a moderate increase</b>		<b>38.5%</b>	<b>2087</b>
No increase		29.6%	1602
Not applicable to my business		5.3%	285
<i>answered question</i>			<b>5420</b>
<i>skipped question</i>			<b>20</b>

<b>2. What actions are your existing clients taking? (Respondents were asked to select all that apply)</b>			
		Response Percent	Response Count
<b>Standing firm with existing strategies</b>		<b>77.5%</b>	<b>4165</b>
Reviewing financial goals		47.6%	2559
Reviewing asset allocation		57.3%	3079
Rebalancing portfolio		33.6%	1806
Moving assets to lower-risk positions		45.2%	2431
Taking advantage of investment opportunities		39.7%	2135
Other actions		9.4%	503
<i>answered question</i>			<b>5377</b>
<i>skipped question</i>			<b>63</b>

Other actions frequently cited by respondents included tax loss harvesting, going to cash to meet near-term needs and reassessing risk tolerance.

3. What actions have you taken with your own personal financial plan? (Respondents were asked to select all that apply)			
		Response Percent	Response Count
Standing firm with existing strategies		78.2%	4239
Reviewing financial goals		12.7%	691
Reviewing asset allocation		20.4%	1107
Moving assets to lower-risk positions		9.4%	508
Taking advantage of investment opportunities		41.8%	2269
Other actions		5.2%	282
		<b>answered question</b>	<b>5422</b>
		<b>skipped question</b>	<b>18</b>

Other actions frequently cited by respondents included rebalancing portfolio, tax loss harvesting and reviewing discretionary expenditures.

4. To what extent do you believe the "rescue bill" will help government efforts to revive the economy?			
		Response Percent	Response Count
The bill will definitely help revive the economy		11.1%	598
The bill will be moderately successful in reviving the economy		42.3%	2270
Undecided about the impact of the bill		33.1%	1777
The bill is not the right approach to reviving the economy		13.0%	700
No opinion		0.5%	25
		<b>answered question</b>	<b>5370</b>
		<b>skipped question</b>	<b>70</b>

5. How long do you think it will be before consumers see a positive impact on their financial situation as a result of the actions taken by the government?			
		Response Percent	Response Count
About 2 years		45.9%	2456
Between 2 and 5 years		32.0%	1714
Between 5 and 7 years		3.9%	207
More than 7 years		1.9%	99
Not sure		16.4%	875
<i>answered question</i>			5351
<i>skipped question</i>			89

6. Will the government's recent efforts to revive the economy have an effect on your votes in November?			
		Response Percent	Response Count
Yes		16.5%	882
No		77.4%	4146
Not sure		6.1%	328
<i>answered question</i>			5356
<i>skipped question</i>			84

7. How do you view the media coverage of the recent economic uncertainties?			
		Response Percent	Response Count
Exaggerates Situation		72.3%	3882
Downplays Situation		1.3%	72
Balanced		10.3%	555
Not Sufficiently Detailed		13.0%	697
No Opinion		3.1%	166
<i>answered question</i>			5372
<i>skipped question</i>			68