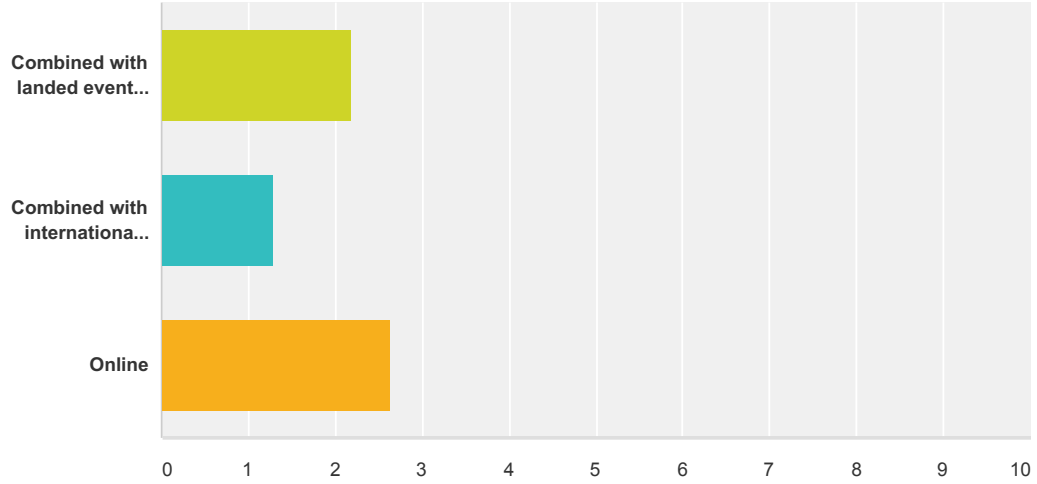


SURVEY FOR IARFC CE EVENTS

Q1 Assign your preference to the different methods of obtaining CE. (1 being first preference, 2 being second, etc.)

Answered: 174 Skipped: 3

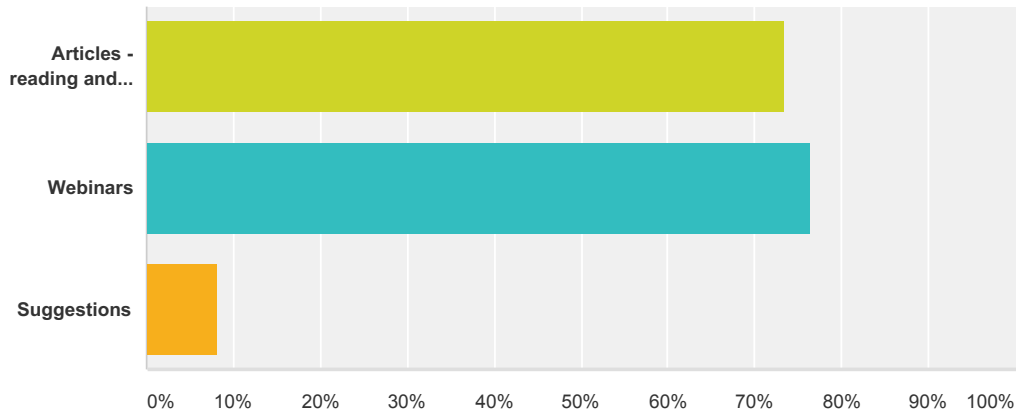


	1	2	3	N/A	Total	Score
Combined with landed events in US	22.58% 35	65.16% 101	5.16% 8	7.10% 11	155	2.19
Combined with international / domestic cruises or rail trips	6.49% 10	11.69% 18	62.99% 97	18.83% 29	154	1.30
Online	73.37% 124	14.79% 25	11.24% 19	0.59% 1	169	2.63

SURVEY FOR IARFC CE EVENTS

Q2 What type of ONLINE CE would interest you? (multiple responses accepted)

Answered: 174 Skipped: 3



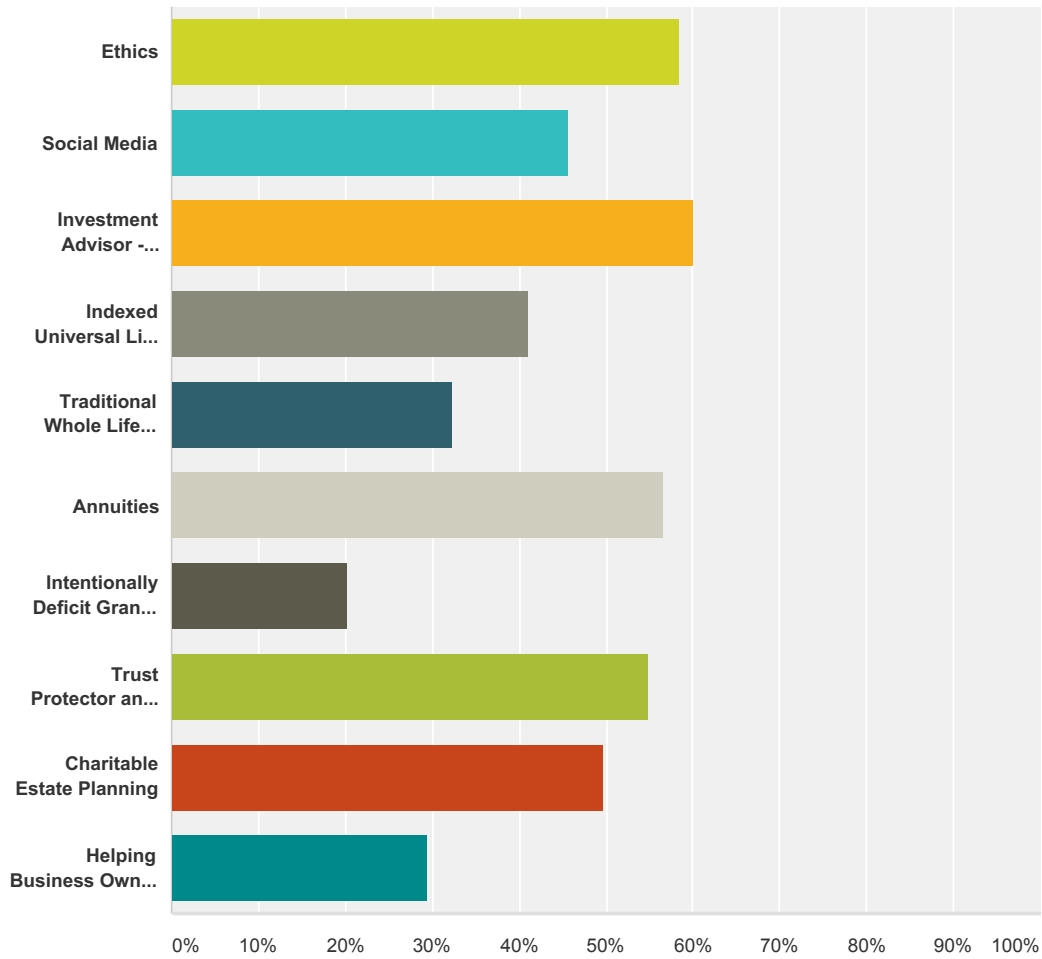
Answer Choices	Responses
Articles - reading and answering questions	73.56% 128
Webinars	76.44% 133
Suggestions	8.05% 14
Total Respondents: 174	

#	Suggestions	Date
1	Through RegED - combined with L/H credits for states etc	10/30/2015 11:23 AM
2	CE credit for States	10/28/2015 12:35 PM
3	Workshops like the business owner events	10/28/2015 10:40 AM
4	vendor sponsor events around regions	10/28/2015 8:14 AM
5	from the articles in the register	10/21/2015 4:38 PM
6	Live programs that other groups allow such as CFP etc.	10/21/2015 10:41 AM
7	Multiple choice financial questions	10/21/2015 10:12 AM
8	On Demand Web Events	10/20/2015 4:11 AM
9	Small Group phone or internet video discussion of article or topic	10/15/2015 11:57 PM
10	none	10/15/2015 11:02 AM
11	Combined CE with Insurance/CFP/CIMA	10/15/2015 8:15 AM
12	Youtube	10/15/2015 7:25 AM
13	CPE arrangement with providers offered to CPA's,CLU,CHFC , CFP's, LLB etc	10/15/2015 7:01 AM
14	recorded	10/15/2015 6:20 AM

SURVEY FOR IARFC CE EVENTS

**Q3 What CE topics are of interest to you?
(multiple responses accepted)**

Answered: 173 Skipped: 4



Answer Choices	Responses	Count
Ethics	58.38%	101
Social Media	45.66%	79
Investment Advisor - Fee-Only Service	60.12%	104
Indexed Universal Life Insurance	41.04%	71
Traditional Whole Life Insurance with PUA Rider	32.37%	56
Annuities	56.65%	98
Intentionally Deficit Grants or Trusts	20.23%	35
Trust Protector and Planning	54.91%	95
Charitable Estate Planning	49.71%	86
Helping Business Owners Obtain Loans	29.48%	51

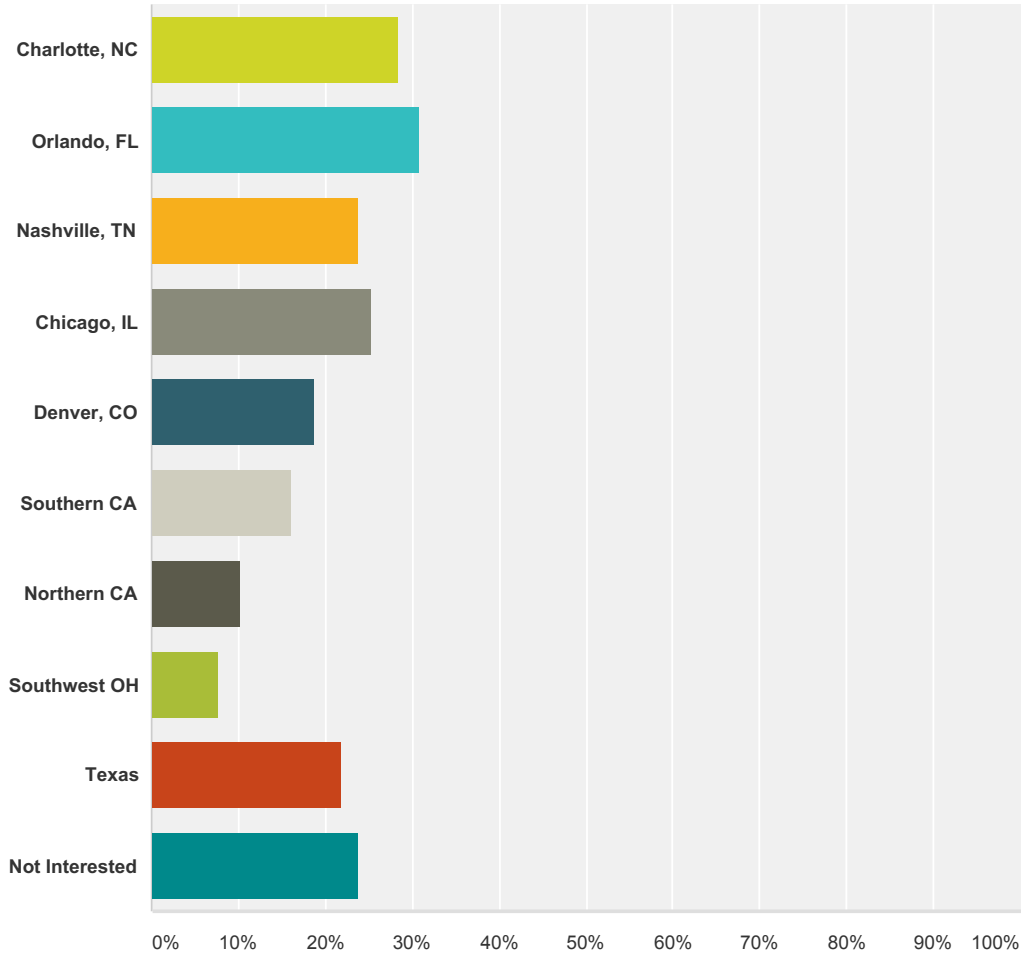
SURVEY FOR IARFC CE EVENTS

Total Respondents: 173

SURVEY FOR IARFC CE EVENTS

Q4 CE Programs have been held in the Spring, the day before the National Financial Plan Competition Finals. Where would you be interested in attending a CE Event? (multiple responses accepted)

Answered: 155 Skipped: 22



Answer Choices	Responses
Charlotte, NC	28.39% 44
Orlando, FL	30.97% 48
Nashville, TN	23.87% 37
Chicago, IL	25.16% 39
Denver, CO	18.71% 29
Southern CA	16.13% 25
Northern CA	10.32% 16
Southwest OH	7.74% 12

SURVEY FOR IARFC CE EVENTS

Texas	21.94%	34
Not Interested	23.87%	37
Total Respondents: 155		

#	Other (please specify)	Date
1	washington D.C.	11/1/2015 10:56 AM
2	Salt Lake City, UT	10/30/2015 4:38 PM
3	Arizona	10/30/2015 1:04 PM
4	Kiel WI	10/30/2015 11:19 AM
5	Kansas City, MO	10/30/2015 11:14 AM
6	Arizona	10/28/2015 4:47 PM
7	Kansas City	10/28/2015 9:11 AM
8	Philadelphia	10/28/2015 9:10 AM
9	City closer to Pittsburgh	10/28/2015 8:59 AM
10	Atlanta	10/28/2015 8:14 AM
11	Raleigh, NC	10/28/2015 6:44 AM
12	Boston area	10/28/2015 6:15 AM
13	Atlanta	10/22/2015 1:18 PM
14	New Jersey / New York	10/22/2015 2:56 AM
15	florida gulf	10/21/2015 4:39 PM
16	phoenix	10/21/2015 10:59 AM
17	Las Vegas	10/21/2015 10:33 AM
18	Scottsdale, AZ, Jackson Hole, WY, or Deer Valley/Park City, UT	10/21/2015 9:31 AM
19	NY or NJ	10/21/2015 8:23 AM
20	DC/Baltimore/Philly area	10/20/2015 11:43 PM
21	East Coast - Phila. or NJ	10/20/2015 6:18 PM
22	Kansas City, MO. Omaha, NE	10/20/2015 9:21 AM
23	WA, OR	10/19/2015 4:42 PM
24	Atlanta, Austin, Pensacola	10/17/2015 11:49 AM
25	st. louis, Mo.	10/17/2015 11:16 AM
26	Metro DC area	10/16/2015 10:22 AM
27	Atlanta/Branson/Louisville	10/15/2015 11:58 PM
28	Richmond, VA	10/15/2015 8:02 PM
29	Portland, OR	10/15/2015 6:51 PM
30	upper Midwest such as Minneapolis	10/15/2015 4:59 PM
31	bucks county penna.	10/15/2015 2:23 PM
32	tampa	10/15/2015 2:02 PM
33	Atlanta, GA	10/15/2015 11:57 AM
34	new orleans	10/15/2015 10:41 AM
35	Washington, DC; Phila, PA	10/15/2015 10:28 AM
36	Atlanta, GA	10/15/2015 9:45 AM

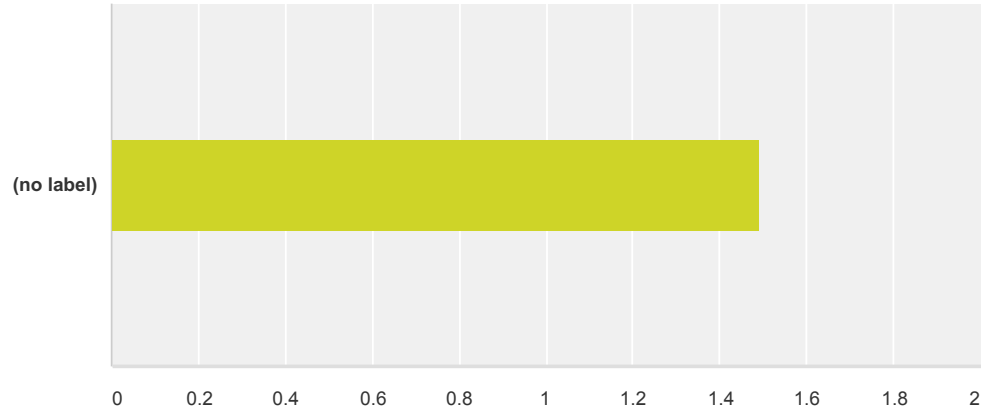
SURVEY FOR IARFC CE EVENTS

37	atlanta	10/15/2015 9:41 AM
38	Louisville,Ky	10/15/2015 9:27 AM
39	Additional cities-Richmond, VA / Raleigh, NC /	10/15/2015 9:19 AM
40	Northeast- Boston, CT. NY. DC, Phil	10/15/2015 8:29 AM
41	MIAMI, FLORIDA	10/15/2015 8:26 AM
42	Columbia, SC: Atlanta, GA	10/15/2015 8:16 AM
43	Atlanta, GA	10/15/2015 7:26 AM
44	make it simple,accessible any time anywhere, flexible-several ways to complete CE, CE's conform to high stds	10/15/2015 7:07 AM
45	Michigan	10/15/2015 6:57 AM
46	Philadelphia	10/15/2015 6:26 AM

SURVEY FOR IARFC CE EVENTS

Q5 What is your interest in traveling on an IARFC Cruise

Answered: 162 Skipped: 15



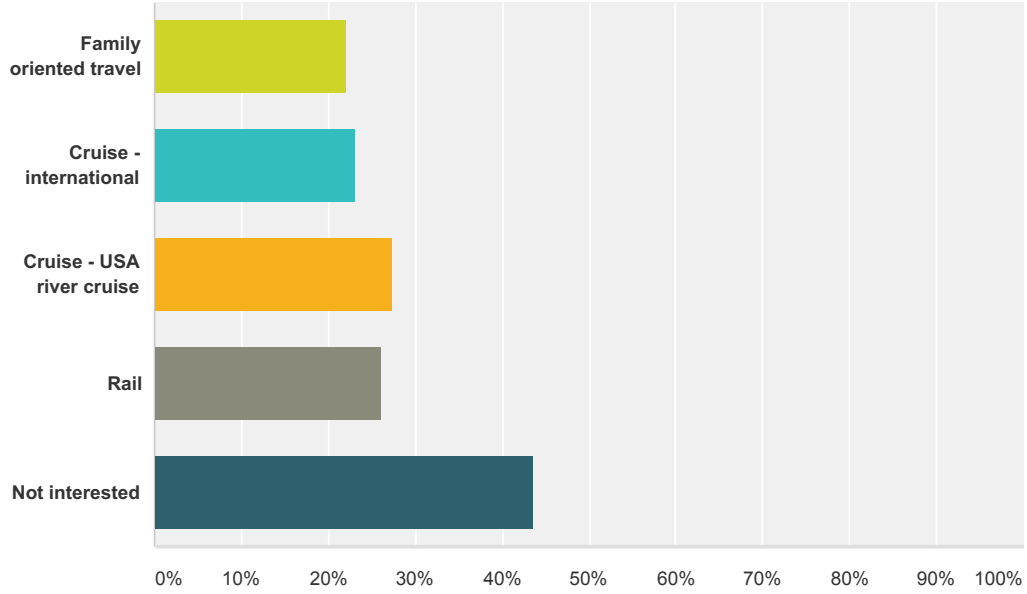
	Not interested	Somewhat interested	Very interested	Total	Weighted Average
(no label)	59.26% 96	32.72% 53	8.02% 13	162	1.49

#	Comments	Date
1	Hard for me to do international cruises	10/28/2015 5:07 PM
2	Would need to depart from the U.S. per IRS deductability rules.	10/28/2015 10:23 AM
3	primary reason it conflicts with other events, plus 3 children at home under 15	10/28/2015 9:18 AM
4	i dont like cruises	10/28/2015 6:17 AM
5	Best Venue on the planet	10/28/2015 6:10 AM
6	Only way to go!!!	10/22/2015 1:21 PM
7	Just a matter of taking that much time off and price. Would like to see sample itinerary (daily schedule)	10/22/2015 2:57 AM
8	not at this time	10/21/2015 10:41 AM
9	Cruises are expensive and timing is usually a problem	10/15/2015 5:01 PM
10	international airfare is very costly, prefer leaving from USA	10/15/2015 3:41 PM
11	Don't like cruises	10/15/2015 11:43 AM
12	Add places like the Dominican Republic and now consider CUBA	10/15/2015 9:30 AM
13	Waste of time & money. For the IARFC "click".	10/15/2015 9:22 AM
14	Dont like Cruises	10/15/2015 8:32 AM
15	for those who can't- on line link?	10/15/2015 7:25 AM

SURVEY FOR IARFC CE EVENTS

Q6 What type of travel alternatives would interest you? (multiple responses accepted)

Answered: 172 Skipped: 5

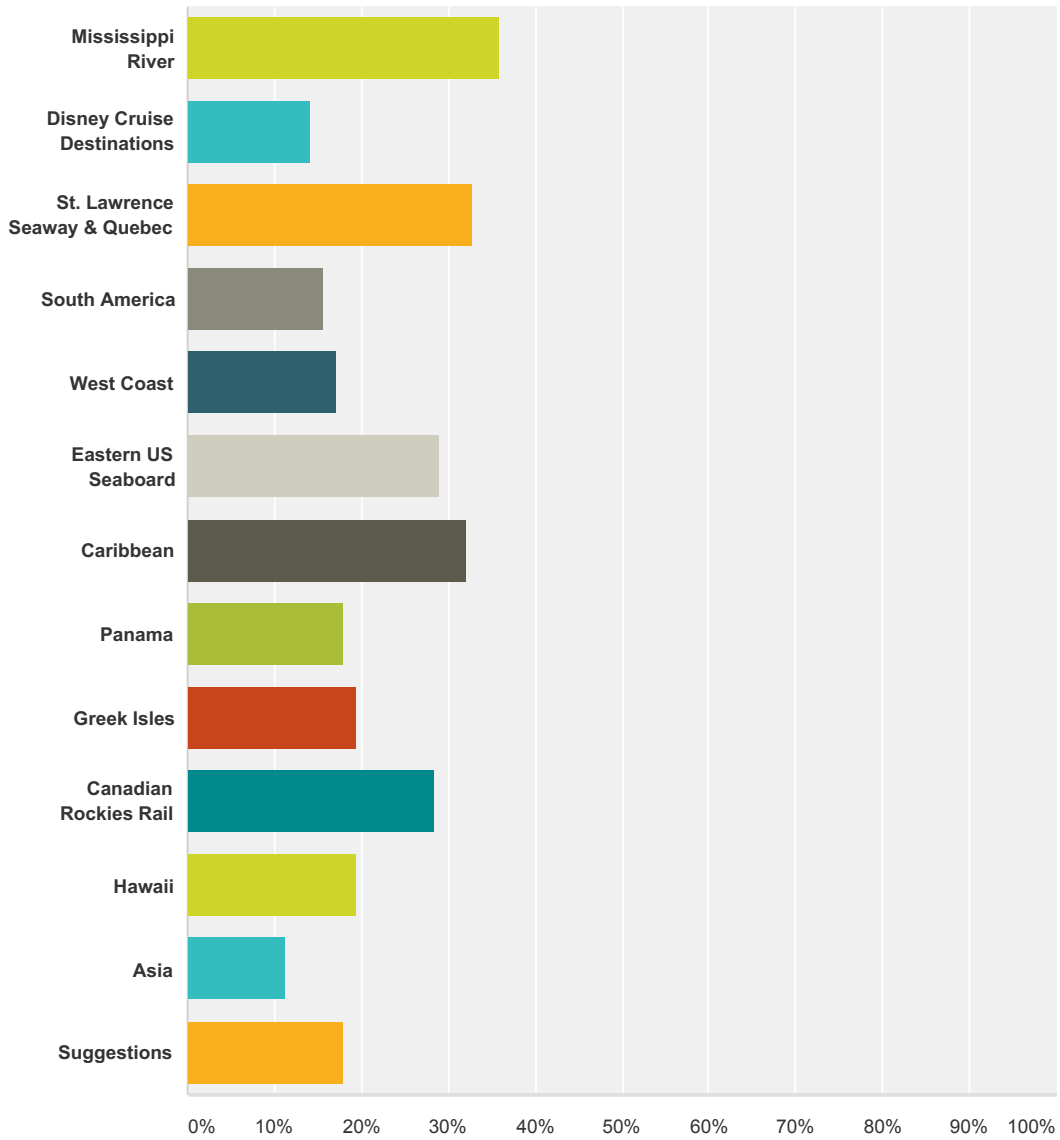


Answer Choices	Responses	Count
Family oriented travel	22.09%	38
Cruise - international	23.26%	40
Cruise - USA river cruise	27.33%	47
Rail	26.16%	45
Not interested	43.60%	75
Total Respondents: 172		

SURVEY FOR IARFC CE EVENTS

**Q7 What destinations would interest you?
(multiple responses accepted)**

Answered: 134 Skipped: 43



Answer Choices	Responses	Count
Mississippi River	35.82%	48
Disney Cruise Destinations	14.18%	19
St. Lawrence Seaway & Quebec	32.84%	44
South America	15.67%	21
West Coast	17.16%	23
Eastern US Seaboard	29.10%	39
Caribbean	32.09%	43

SURVEY FOR IARFC CE EVENTS

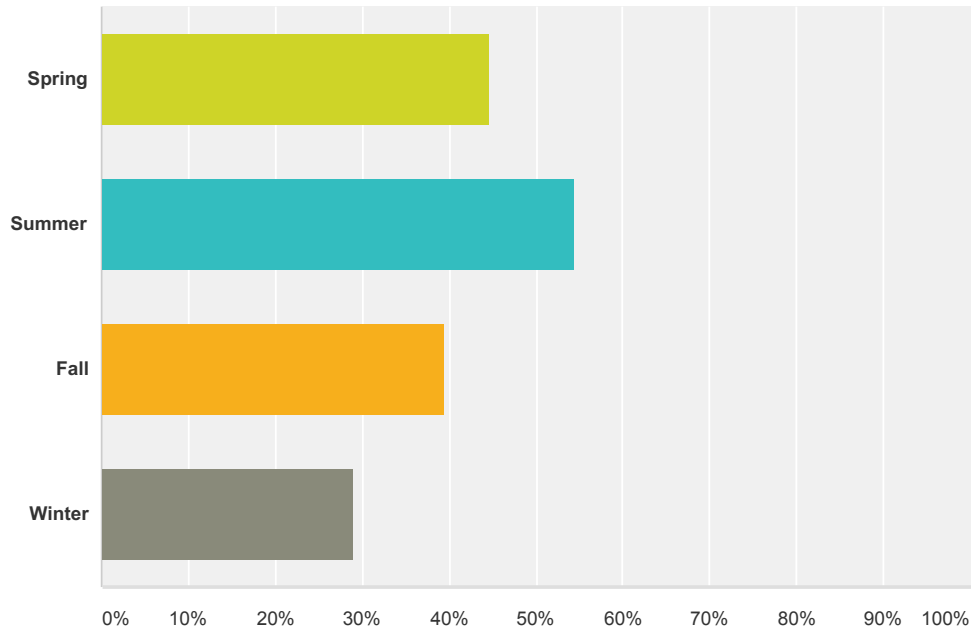
Panama	17.91%	24
Greek Isles	19.40%	26
Canadian Rockies Rail	28.36%	38
Hawaii	19.40%	26
Asia	11.19%	15
Suggestions	17.91%	24
Total Respondents: 134		

#	Suggestions	Date
1	does not interest me	10/30/2015 11:24 AM
2	Not Interested	10/30/2015 11:20 AM
3	na	10/28/2015 3:43 PM
4	I do NOT want to travel to get CE!	10/28/2015 11:45 AM
5	not sure	10/28/2015 9:18 AM
6	Not interested	10/28/2015 9:08 AM
7	I do not like to cruise	10/28/2015 9:01 AM
8	none	10/28/2015 6:17 AM
9	Scandinavia	10/22/2015 1:21 PM
10	none	10/21/2015 4:30 PM
11	Las Vegas	10/21/2015 10:34 AM
12	Alaska, Australia, New Zealand	10/21/2015 9:34 AM
13	none	10/21/2015 9:28 AM
14	Europe Rivers	10/15/2015 6:53 PM
15	none	10/15/2015 3:15 PM
16	none	10/15/2015 2:03 PM
17	Additional US rivers and Intl cruises	10/15/2015 1:34 PM
18	Not interested	10/15/2015 10:28 AM
19	None	10/15/2015 9:46 AM
20	all of the above	10/15/2015 9:43 AM
21	Do CE a different times in different locations	10/15/2015 8:32 AM
22	for those who opt out of travel CE's- on line access?	10/15/2015 7:25 AM
23	Not interested	10/15/2015 7:17 AM
24	Alaska	10/15/2015 6:27 AM

SURVEY FOR IARFC CE EVENTS

Q8 What time of year would you like to travel? (multiple responses accepted)

Answered: 134 Skipped: 43

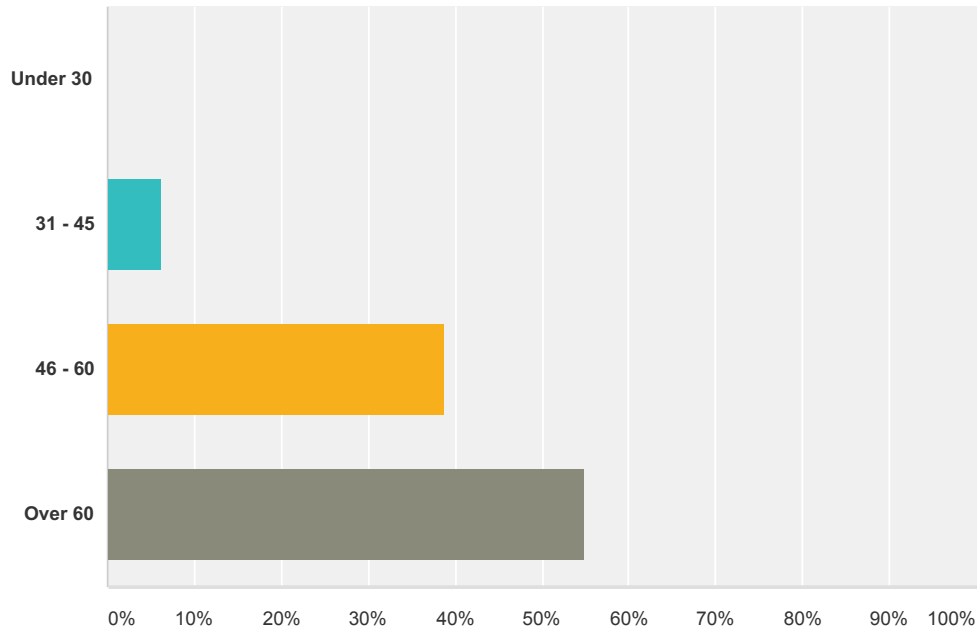


Answer Choices	Responses	
Spring	44.78%	60
Summer	54.48%	73
Fall	39.55%	53
Winter	29.10%	39
Total Respondents: 134		

SURVEY FOR IARFC CE EVENTS

Q9 Please provide your age.

Answered: 173 Skipped: 4

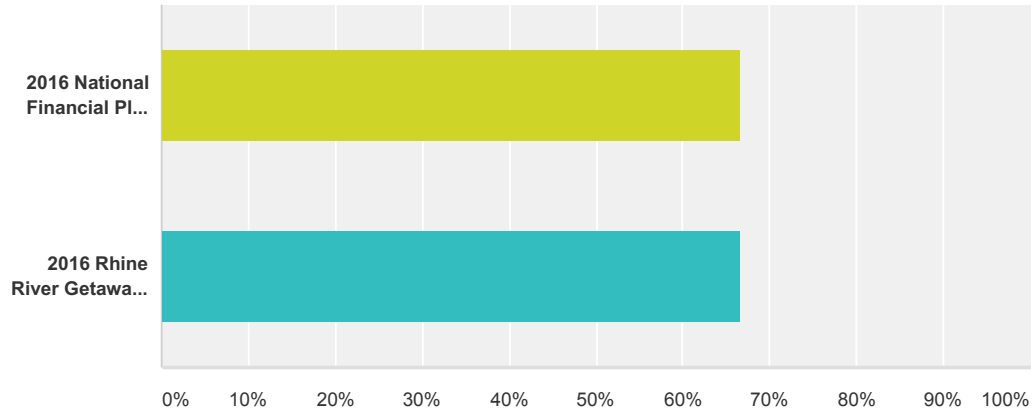


Answer Choices	Responses
Under 30	0.00% 0
31 - 45	6.36% 11
46 - 60	38.73% 67
Over 60	54.91% 95
Total	173

SURVEY FOR IARFC CE EVENTS

Q10 Send me information on the following...

Answered: 51 Skipped: 126



Answer Choices	Responses
2016 National Financial Plan Competition held in Charlotte, NC in April 20 & 21	66.67% 34
2016 Rhine River Getaway - July 16 - 23	66.67% 34
Total Respondents: 51	