



Card # 1

---

1	2	3	4	5
Almost no shopping		Moderate shopping		A great deal of shopping

---

Card #2

Call Around

Newspapers/Magazines

Material in the Mail

Television/Radio

Internet/Online Service

Advertisements

Friend/Relative

Lawyer

Accountant

Banker

Broker

Financial Planner

Do Not Save or Invest

Other

Card #3

Education for Your Children

Education for Others

Health Care for Self/Spouse/Partner

Health Care for Others

Purchase of a New Home

Other Major Financial Obligations (SPECIFY)

Card #4

Next Few Months

Next Year

Next Few Years

Next 5 –10 Years

Longer than 10 Years

Card #5

Take substantial risks expecting to earn substantial returns

Take above average risks expecting to earn above average returns

Take average financial risks expecting to earn average returns

Not willing to take any financial risks

Card #6

Don't save – usually spend more than income

Don't save – usually spend about as much as income

Save whatever is left over at the end of the month –  
no regular plan

Save income of one family member, spend the other

Spend regular income, save other income

Save regularly by putting money aside each month

## **Retirement Assets**

### **Retirement assets associated with jobs**

#### Current Job Pensions

- 401(k) and other account plans
- Plans that provide monthly retirement income
- Hybrid plans

#### Past Job Pensions

- Currently receiving benefits /making withdrawals
- Will receive benefits in the future

#### Social Security

- Retirement, survivor's, or disability benefits

### **Other retirement assets**

#### IRAs, Keoghs

- Started directly, or rolled over from pension/account from a former job

#### Annuities

- Directly purchased annuities



Card #8

Working Now/Self Employed

Temporarily Laid Off

Unemployed and Looking for Work

On Sick Leave or Maternity Leave

Student

Homemaker

Disabled

Retired (full, partial, or temporary)

Volunteer Work

On Vacation/ Other Leave of Absence

On Strike

Other Not Working and Not Looking for Work

Card #9

Too expensive, can't afford health insurance

Can't get insurance because of poor health, age, or illness

Don't believe in health insurance

Not much sickness in the family, we haven't needed insurance

Dissatisfied with previous insurance

Job layoff or job loss

Some other reason (Specify)