<table>
<thead>
<tr>
<th>Letter</th>
<th>Min Value</th>
<th>Max Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>$1 to $100</td>
<td></td>
</tr>
<tr>
<td>B</td>
<td>$101 to $500</td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>$501 to $1,000</td>
<td></td>
</tr>
<tr>
<td>D</td>
<td>$1,001 to $2,500</td>
<td></td>
</tr>
<tr>
<td>E</td>
<td>$2,501 to $5,000</td>
<td></td>
</tr>
<tr>
<td>F</td>
<td>$5,001 to $7,500</td>
<td></td>
</tr>
<tr>
<td>G</td>
<td>$7,501 to $10,000</td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>$10,001 to $25,000</td>
<td></td>
</tr>
<tr>
<td>I</td>
<td>$25,001 to $50,000</td>
<td></td>
</tr>
<tr>
<td>J</td>
<td>$50,001 to $75,000</td>
<td></td>
</tr>
<tr>
<td>K</td>
<td>$75,001 to $100,000</td>
<td></td>
</tr>
<tr>
<td>L</td>
<td>$100,001 to $250,000</td>
<td></td>
</tr>
<tr>
<td>M</td>
<td>$250,001 to $500,000</td>
<td></td>
</tr>
<tr>
<td>N</td>
<td>$500,001 to $1 million</td>
<td></td>
</tr>
<tr>
<td>O</td>
<td>$1 million to $5 million</td>
<td></td>
</tr>
<tr>
<td>P</td>
<td>$5 million to $10 million</td>
<td></td>
</tr>
<tr>
<td>Q</td>
<td>$10 million to $25 million</td>
<td></td>
</tr>
<tr>
<td>R</td>
<td>$25 million to $50 million</td>
<td></td>
</tr>
<tr>
<td>S</td>
<td>$50 million to $100 million</td>
<td></td>
</tr>
<tr>
<td>T</td>
<td>More than $100 million</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>------------------------------</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Almost no shopping</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Moderate shopping</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>A great deal of shopping</td>
<td></td>
</tr>
</tbody>
</table>
Call Around
Newspapers/Magazines
Material in the Mail
Television/Radio
Internet/Online Service
Advertisements
Friend/Relative
Lawyer
Accountant
Banker
Broker
Financial Planner
Other
Never Borrow
Do Not Save or Invest
The Survey of Consumer Finances

SHOWCARD #3

Commercial Bank
Savings & Loan
or Savings Bank
Credit Union
Mortgage Company
Finance or Loan Company
Brokerage
Broad Financial Services Company
Other
Check Written on Institution
ATM/Cash Machine/Debit Card
In-Person
Mail
Phone – Talking
Phone – Using Touchtone Service
Automatic Deposit or Withdrawal
Computer/Internet/Online Services
Other Electronic Transfer
Other
Don’t Do Regular Business
The Survey of Consumer Finances

SHOWCARD #5

Personal Savings or Assets
Credit Card (Personal or Business)
Personal Loan from a Bank or Savings Institution
Personal Loan from a Credit Union
Personal Loan from Some Other Type of Institution or Investor
Business Loan from a Bank or Savings Institution
Business Loan from a Credit Union
Business Loan from Some Other Type of Institution or Investor
Other
Business Checking or Share Draft Accounts
Business Savings Accounts
Business Lines of Credit
Business Mortgages
Other Business Loans or Leases
Business Credit Cards
Credit or Debit Card
Payment Processing
Other
Next Few Months

Next Year

Next Few Years

Next 5 to 10 Years

Longer than 10 Years
Showcard #8

Take substantial financial risks to earn substantial returns

Take above average financial risks expecting to earn above average returns

Take average financial risks expecting to earn average returns

Not willing to take any financial risks
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
Location of their offices

Had the lowest fees/
minimum balance requirement

Able to obtain many
services at one place

Offered safety and absence of risk

Some other reason
Don’t write enough checks to make it worthwhile

Minimum balance is too high

Do not like dealing with banks

Service charges are too high

No bank has convenient hours or location

Some other reason
The Survey of Consumer Finances

SHOWCARD #13

Working Now/Self Employed
Temporarily Laid Off
On Vacation/Other Leave of Absence
Unemployed & Looking for Work
On Sick Leave or Maternity Leave
Disabled
Retired (Full, Partial, or Temporary)
Student
Homemaker
On Strike
Volunteer Work
Other
White
Black/African American
Hispanic/Latino
Asian
American Indian/Alaska Native
Native Hawaiian/Other Pacific Islander
Other
Too expensive, can’t afford health insurance

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

Don’t believe in health insurance

Not much sickness in the family – we haven’t needed health insurance

Dissatisfied with previous insurance

Job layoff or job loss

Some other reason