

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

Commercial bank

Savings & loan or savings bank

Credit Union

Mortgage Company

Finance or Loan Company

Brokerage

Other

Card #4

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

Card #5

Next Few Months

Next Year

Next Few Years

Next 5 –10 Years

Longer than 10 Years

Card #6

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 #7

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

Card #8

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

Card #9

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

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 #11

Working now/self employed

On vacation/ other leave of absence

Temporarily laid off

Unemployed and looking for work

On sick leave or maternity leave

Disabled

Retired (full, partial, or temporary)

Student

Homemaker

On strike

Volunteer Work

Other

Card #12

PLEASE LIST YOUR STRONGEST IDENTIFICATION FIRST

White

Black/African American

Hispanic/Latino

Asian

American Indian/Alaska Native

Native Hawaiian/Other Pacific Islander

Other

Card #13

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

Dollar Range Card

- A** ...\$1 - \$100
- B** ...\$101 - \$500
- C** ...\$501 - \$1,000
- D** ...\$1,001 - \$2,500

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- E** ...\$2,501 - \$5,000
- F** ...\$5,001 - \$7,500
- G** ...\$7,501 - \$10,000
- H** ...\$10,001 - \$25,000

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- I** ...\$25,001 - \$50,000
- J** ...\$50,001 - \$75,000
- K** ...\$75,001 - \$100,000
- L** ...\$100,001 - \$250,000
- M** ...\$250,001 - \$500,000

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- N** ...\$500,001 - \$1 million
- O** ...\$1 million - \$5 million
- P** ...\$5 million - \$10 million
- Q** ...\$10 million - \$25 million

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- R** ...\$25 million - \$50 million
- S** ...\$50 million - \$100 million
- T** ...More than \$100 million