

The Survey of Consumer Finances

DOLLAR RANGE CARD

A	\$ 1	to	\$ 100
B	\$ 101	to	\$ 500
C	\$ 501	to	\$1,000
D	\$1,001	to	\$2,500

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

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

N	\$ 500,001	to	\$ 1 million
O	\$ 1 million	to	\$ 5 million
P	\$ 5 million	to	\$10 million
Q	\$10 million	to	\$25 million

R	\$25 million	to	\$ 50 million
S	\$50 million	to	\$100 million
T	More than \$100 million		

The Survey of Consumer Finances

SHOWCARD #1

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

The Survey of Consumer Finances

SHOWCARD #2

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

The Survey of Consumer Finances

SHOWCARD #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

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

The Survey of Consumer Finances

SHOWCARD #6

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

The Survey of Consumer Finances

SHOWCARD #7

Next Few Months

Next Year

Next Few Years

Next 5 to 10 Years

Longer than 10 Years

The Survey of Consumer Finances

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

The Survey of Consumer Finances

SHOWCARD #9

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

The Survey of Consumer Finances

SHOWCARD #10

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

The Survey of Consumer Finances

SHOWCARD #11

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

The Survey of Consumer Finances

SHOWCARD #12

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

The Survey of Consumer Finances

SHOWCARD #14

White

Black/African American

Hispanic/Latino

Asian

American Indian/Alaska Native

Native Hawaiian/Other Pacific Islander

Other

The Survey of Consumer Finances

SHOWCARD #15

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