

Trade Area: 8044 Montgomery Rd - 1 mi.

	Product Count of Area	% of Area HHS	Product Count of Base	% of Base HHS	Index: %	Average \$ Balance per HH of Area	Average \$ Balance per HH of Base	Index: Average \$
Basics								
Population	11,776	100.00	337,643,652	100.00	100	--	--	--
Households	4,513	100.00	129,687,464	100.00	100	--	--	--
Average Household Income	--	169,348.12	--	113,181.00	150	--	--	--
Deposits								
Deposit (Checking Savings Money Market CD) Account	4,297	95.21	121,547,251	93.72	102	92,103.91	79,019.27	117
Checking Account(s)	4,138	91.69	116,928,225	90.16	102	16,346.33	14,348.04	114
Direct Deposit	3,372	74.72	91,297,875	70.40	106	--	--	--
Any Savings (Incl Money Market)	3,633	80.50	99,229,841	76.52	105	64,823.36	58,062.93	112
Traditional Savings Account(s)	3,452	76.49	94,674,805	73.00	105	40,399.97	36,509.02	111
Any Other Type of Savings or Money Market Account(s)	1,112	24.64	28,083,174	21.66	114	89,931.76	85,668.94	105
Non-Traditional Savings Account Type: Money Market	787	17.44	19,690,413	15.18	115	83,847.43	79,959.64	105
Certificate(s) of Deposit (CDs)	1,010	22.38	25,000,678	19.28	116	90,744.27	89,522.45	101
ATM/Debit Card								
Pre-Paid Debit Card(s)	951	21.07	32,416,691	25.00	84	--	--	--
ATM or Debit Card	3,817	84.58	113,004,183	87.14	97	--	--	--

Benchmark: USA

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Index Colors:	<80	80-110	110+
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Trade Area: 8044 Montgomery Rd - 1 mi.

	Product Count of Area	% of Area HHs	Product Count of Base	% of Base HHs	Index: %	Average \$ Balance per HH of Area	Average \$ Balance per HH of Base	Index: Average \$
Investment								
Any Investment (Mutual Fund 401(k) 403(b) 457 etc.) Account	2,451	54.31	59,870,139	46.16	118	486,183.43	419,666.31	116
Any Keoughs/HR10s or IRAs	1,837	40.70	42,495,918	32.77	124	396,591.22	365,334.79	109
Brokerage Account(s)	1,748	38.73	43,692,766	33.69	115	--	--	--
Corporate or Municipal Bonds	382	8.46	10,180,001	7.85	108	--	--	--
Times bought/sold thru broker in last 90 days - 1-4 times all accounts	652	14.45	17,366,903	13.39	108	--	--	--
Times bought/sold thru broker in last 90 days - 5-9 times all accounts	155	3.44	4,225,122	3.26	105	--	--	--
Mutual Funds and ETFs	1,305	28.92	29,995,635	23.13	125	529,024.43	475,325.45	111
Mutual Fund Invested in Stocks	439	9.73	10,607,596	8.18	119	446,486.42	371,645.89	120
Mutual Fund Invested in Bonds/Interest-Earning Assets	228	5.05	5,662,103	4.37	116	271,039.31	253,051.51	107
Mutual Fund Split Investments (Stocks/Bonds/Interest-Earning Assets)	555	12.30	12,343,751	9.52	129	515,598.93	524,213.58	98
Real Estate	861	19.08	23,242,444	17.92	106	--	--	--
Publicly-Traded Stocks	1,460	32.35	37,928,335	29.25	111	--	--	--
Publicly-Traded Stock of Current or Former Employer	485	10.75	12,810,752	9.88	109	--	--	--
Publicly-Traded Stocks of Other Company	917	20.32	23,261,381	17.94	113	--	--	--
Tax-Deferred Savings Plan (Coverdell/529/Education Plan)	508	11.26	10,692,280	8.24	137	55,593.13	54,902.49	101
Government Savings Bonds	710	15.73	18,021,673	13.90	113	--	--	--
Government Bonds or Treasury Bills	445	9.86	11,966,031	9.23	107	--	--	--
Any Pension Retirement (Incl 401(k)) or Tax-Deferred Savings Plan	2,651	58.74	64,508,385	49.74	118	323,807.42	299,892.21	108
Non-Traditional Savings Account Type: Coverdell/Education IRA	143	3.17	3,702,449	2.85	111	69,614.12	66,175.49	105
Non-Traditional Savings Account Type: 529/State Sponsored Education Account	396	8.78	7,636,001	5.89	149	50,826.52	47,398.79	107
Retirement Investment								
401(k)	1,533	33.97	38,034,481	29.33	116	268,791.29	235,037.83	114
401(k) Invested in Stocks	344	7.62	8,318,950	6.42	119	288,144.11	227,928.34	126
401(k) Invested in Bonds/Interest-Earning Assets	217	4.81	5,813,126	4.48	107	150,953.48	141,423.93	107
401(k) Split Investments (Stocks/Bonds/Interest-Earning Assets)	680	15.07	16,126,101	12.44	121	320,073.78	310,294.69	103
Roth 401(k)	271	6.00	6,400,415	4.93	122	176,494.07	156,057.62	113
403(b)	238	5.27	5,236,683	4.04	131	250,201.11	259,048.03	97
Regular or other IRA	1,210	26.81	27,821,739	21.45	125	424,900.78	407,935.04	104
Regular IRA Invested in Stocks	262	5.81	6,443,135	4.97	117	--	--	--
Regular IRA Other Investments	248	5.50	5,632,212	4.34	127	--	--	--
Roth IRA	852	18.88	18,503,330	14.27	132	209,513.04	186,580.65	112
Roth IRA Invested in Stocks	216	4.79	5,133,871	3.96	121	--	--	--
Roth IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	411	9.11	8,279,371	6.38	143	--	--	--
Roth IRA Other Investments	154	3.41	3,118,111	2.40	142	--	--	--
Rollover IRA	646	14.31	14,680,406	11.32	126	369,301.77	363,929.52	101
Rollover IRA Invested in Stocks	153	3.39	3,521,854	2.72	125	--	--	--
Rollover IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	322	7.13	7,051,532	5.44	131	--	--	--
Rollover IRA Other Investments	104	2.31	2,324,045	1.79	129	--	--	--
Traditional Pension Plan	1,057	23.42	23,460,550	18.09	129	313,101.12	328,914.67	95

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Trade Area: 8044 Montgomery Rd - 1 mi.

	Product Count of Area	% of Area HHs	Product Count of Base	% of Base HHs	Index: %	Average \$ Balance per HH of Area	Average \$ Balance per HH of Base	Index: Average \$
Basics								
Population	11,776	100.00	337,643,652	100.00	100	--	--	--
Households	4,513	100.00	129,687,464	100.00	100	--	--	--
Average Household Income	--	169,348.12	--	113,181.00	150	--	--	--
Credit Card								
Visa	2,994	66.34	85,621,377	66.02	100	1,976.11	1,887.76	105
MasterCard	2,005	44.43	54,056,439	41.68	107	1,730.37	1,587.20	109
Discover	766	16.97	17,160,515	13.23	128	1,048.07	1,117.63	94
American Express Blue/Credit Card	609	13.49	16,313,005	12.58	107	1,673.29	1,439.94	116
Other	223	4.94	5,921,750	4.57	108	941.62	809.83	116
Credit								
Auto Loan(s)	1,498	33.19	41,933,058	32.33	103	18,460.25	17,149.41	108
Auto Loan Applied On Own	683	15.13	18,893,305	14.57	104	16,357.37	14,901.49	110
Auto Loan Handled By Dealer	847	18.77	23,528,643	18.14	103	19,134.61	18,227.29	105
Mortgage	1,840	40.77	44,221,225	34.10	120	179,571.47	203,568.22	88
Second Mortgage	138	3.06	3,323,717	2.56	119	310,646.20	257,414.34	121
Fixed Rate Mortgage	1,478	32.75	34,792,216	26.83	122	194,302.20	245,971.57	79
Adjustable Rate Mortgage	187	4.14	4,138,664	3.19	130	194,476.94	197,948.60	98
Student Loan(s)	790	17.50	24,357,505	18.78	93	34,760.04	31,204.79	111
Any Line of Credit (HELOC)	757	16.77	22,392,939	17.27	97	16,050.34	13,096.42	123
Home Equity Line of Credit (HELOC)	459	10.17	10,197,623	7.86	129	29,320.12	30,790.19	95
Non-HELOC Line of Credit	292	6.47	11,876,508	9.16	71	6,204.02	4,300.79	144
Home Equity Loan(s)	382	8.46	8,501,557	6.55	129	201,256.47	192,314.96	105
Any Credit (Loan Mortgage Line of Credit Credit Card) Account	4,230	93.73	118,705,784	91.53	102	129,538.38	116,845.30	111

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	Product Count of Area	% of Area HHS	Product Count of Base	% of Base HHS	Index: %	Average \$ Balance per HH of Area	Average \$ Balance per HH of Base	Index: Average \$
Basics								
Population	11,758	100.00	345,735,705	100.00	100	--	--	--
Households	4,487	100.00	133,186,678	100.00	100	--	--	--
Average Household Income	--	183,191.30	--	122,965.00	149	--	--	--
Deposits								
Deposit (Checking Savings Money Market CD) Account	4,284	95.48	125,251,156	94.04	102	96,741.95	84,510.89	114
Checking Account(s)	4,130	92.04	120,583,662	90.54	102	16,967.05	15,195.46	112
Direct Deposit	3,384	75.42	94,962,481	71.30	106	--	--	--
Any Savings (Incl Money Market)	3,638	81.08	102,812,539	77.19	105	67,923.35	61,834.10	110
Traditional Savings Account(s)	3,452	76.93	97,927,004	73.53	105	42,144.54	38,738.22	109
Any Other Type of Savings or Money Market Account(s)	1,140	25.41	29,939,830	22.48	113	93,207.49	89,460.40	104
Non-Traditional Savings Account Type: Money Market Account	806	17.96	21,036,460	15.79	114	86,993.58	83,363.64	104
Certificate(s) of Deposit (CDs)	1,028	22.91	26,550,553	19.93	115	93,860.58	93,390.84	101
ATM/Debit Card								
Pre-Paid Debit Card(s)	912	20.32	32,155,198	24.14	84	--	--	--
ATM or Debit Card	3,788	84.42	115,843,194	86.98	97	--	--	--

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Trade Area: 8044 Montgomery Rd - 1 mi.

	Product Count of Area	% of Area HHs	Product Count of Base	% of Base HHs	Index: %	Average \$ Balance per HH of Area	Average \$ Balance per HH of Base	Index: Average \$
Investment								
Any Investment (Mutual Fund 401(k) 403(b) 457 etc.) Account	2,481	55.29	62,857,710	47.20	117	512,205.76	445,485.22	115
Any Keoughs/HR10s or IRAs	1,879	41.88	45,360,569	34.06	123	418,129.66	387,657.88	108
Brokerage Account(s)	1,796	40.03	46,745,163	35.10	114	--	--	--
Corporate or Municipal Bonds	386	8.60	10,793,532	8.10	106	--	--	--
Times bought/sold thru broker in last 90 days - 1-4 times all accounts	662	14.75	18,342,476	13.77	107	--	--	--
Times bought/sold thru broker in last 90 days - 5-9 times all accounts	160	3.57	4,508,249	3.38	105	--	--	--
Mutual Funds and ETFs	1,345	29.98	32,221,495	24.19	124	555,240.16	502,606.48	110
Mutual Fund Invested in Stocks	450	10.03	11,374,731	8.54	117	472,126.70	391,085.20	121
Mutual Fund Invested in Bonds/Interest-Earning Assets	232	5.17	6,047,024	4.54	114	282,059.33	265,469.12	106
Mutual Fund Split Investments (Stocks/Bonds/Interest-Earning Assets)	573	12.77	13,333,681	10.01	128	540,757.87	552,138.90	98
Real Estate	875	19.50	24,603,726	18.47	106	--	--	--
Publicly-Traded Stocks	1,492	33.25	40,325,524	30.28	110	--	--	--
Publicly-Traded Stock of Current or Former Employer	487	10.85	13,465,409	10.11	107	--	--	--
Publicly-Traded Stocks of Other Company	945	21.06	24,929,691	18.72	113	--	--	--
Tax-Deferred Savings Plan (Coverdell/529/Education Plan)	520	11.59	11,337,823	8.51	136	56,858.99	56,798.10	100
Government Savings Bonds	716	15.96	18,808,845	14.12	113	--	--	--
Government Bonds or Treasury Bills	446	9.94	12,451,227	9.35	106	--	--	--
Any Pension Retirement (Incl 401(k)) or Tax-Deferred Savings Plan	2,685	59.84	67,738,226	50.86	118	341,003.43	317,944.15	107
Non-Traditional Savings Account: Coverdell/Education IRA	140	3.12	3,842,638	2.88	108	72,473.45	68,407.36	106
Non-Traditional Savings Account: 529/State Sponsored Education Account	406	9.05	8,168,274	6.13	148	52,699.53	49,322.71	107
Retirement Investment								
401(k)	1,529	34.08	39,271,289	29.49	116	280,741.10	246,338.99	114
401(k) Invested in Stocks	341	7.60	8,609,997	6.46	118	300,503.49	237,343.59	127
401(k) Invested in Bonds/Interest-Earning Assets	214	4.77	5,934,796	4.46	107	156,111.20	148,614.47	105
401(k) Split Investments (Stocks/Bonds/Interest-Earning Assets)	685	15.27	16,844,048	12.65	121	332,602.65	321,932.25	103
Roth 401(k)	265	5.91	6,560,334	4.93	120	182,927.75	162,767.38	112
403(b)	242	5.39	5,510,971	4.14	130	263,099.66	271,698.15	97
Regular or other IRA	1,247	27.79	30,003,174	22.53	123	447,559.16	431,247.51	104
Regular IRA Invested in Stocks	270	6.02	6,910,165	5.19	116	--	--	--
Regular IRA Other Investments	253	5.64	6,064,026	4.55	124	--	--	--
Roth IRA	867	19.32	19,578,245	14.70	131	217,710.35	194,922.31	112
Roth IRA Invested in Stocks	220	4.90	5,422,156	4.07	120	--	--	--
Roth IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	419	9.34	8,816,423	6.62	141	--	--	--
Roth IRA Other Investments	154	3.43	3,272,945	2.46	140	--	--	--
Rollover IRA	659	14.69	15,665,417	11.76	125	388,816.22	383,865.41	101
Rollover IRA Invested in Stocks	152	3.39	3,721,280	2.79	121	--	--	--
Rollover IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	333	7.42	7,649,735	5.74	129	--	--	--
Rollover IRA Other Investments	107	2.38	2,471,043	1.85	129	--	--	--
Traditional Pension Plan	1,088	24.25	25,333,244	19.02	127	332,895.42	350,318.11	95

Benchmark: USA

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Index Colors:	<80	80-110	110+
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Trade Area: 8044 Montgomery Rd - 1 mi.

	Product Count of Area	% of Area HHs	Product Count of Base	% of Base HHs	Index: %	Average \$ Balance per HH of Area	Average \$ Balance per HH of Base	Index: Average \$
Basics								
Population	11,758	100.00	345,735,705	100.00	100	--	--	--
Households	4,487	100.00	133,186,678	100.00	100	--	--	--
Average Household Income	--	183,191.30	--	122,965.00	149	--	--	--
Credit Card								
Visa	3,013	67.15	89,133,171	66.92	100	1,954.62	1,890.69	103
MasterCard	2,020	45.02	56,409,871	42.35	106	1,707.08	1,583.56	108
Discover	776	17.29	18,038,553	13.54	128	1,024.90	1,093.27	94
American Express Blue/Credit Card	624	13.91	17,575,653	13.20	105	1,628.54	1,432.31	114
Other	225	5.01	6,241,646	4.69	107	931.54	797.55	117
Credit								
Auto Loan(s)	1,486	33.12	42,968,373	32.26	103	18,720.09	17,497.37	107
Auto Loan Applied On Own	672	14.98	19,246,098	14.45	104	16,591.02	15,264.51	109
Auto Loan Handled By Dealer	845	18.83	24,256,340	18.21	103	19,359.61	18,516.36	105
Mortgage	1,824	40.65	45,241,660	33.97	120	182,108.77	209,416.88	87
Second Mortgage	134	2.99	3,392,812	2.55	117	316,076.47	265,233.89	119
Fixed Rate Mortgage	1,466	32.67	35,617,473	26.74	122	197,187.93	251,962.60	78
Adjustable Rate Mortgage	182	4.06	4,209,477	3.16	128	201,595.89	205,065.52	98
Student Loan(s)	769	17.14	24,317,714	18.26	94	34,962.75	31,858.12	110
Any Line of Credit	755	16.83	23,071,983	17.32	97	16,198.08	13,426.95	121
Home Equity Line of Credit (HELOC)	458	10.21	10,608,456	7.96	128	29,602.09	31,353.19	94
Non-HELOC Line of Credit	290	6.46	12,110,205	9.09	71	6,286.87	4,454.75	141
Home Equity Loan(s)	378	8.42	8,771,354	6.59	128	202,670.29	195,682.36	104
Any Credit (Loan Mortgage Line of Credit Credit Card) Account	4,226	94.18	122,544,140	92.01	102	129,687.78	118,810.88	109

Benchmark: USA

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Trade Area: 8044 Montgomery Rd - 3 mi.

	Product Count of Area	% of Area HHs	Product Count of Base	% of Base HHs	Index: %	Average \$ Balance per HH of Area	Average \$ Balance per HH of Base	Index: Average \$
Basics								
Population	61,760	100.00	337,643,652	100.00	100	--	--	--
Households	25,906	100.00	129,687,464	100.00	100	--	--	--
Average Household Income	--	140,053.84	--	113,181.00	124	--	--	--
Deposits								
Deposit (Checking Savings Money Market CD) Account	24,502	94.58	121,547,251	93.72	101	81,745.26	79,019.27	103
Checking Account(s)	23,599	91.09	116,928,225	90.16	101	14,484.18	14,348.04	101
Direct Deposit	18,998	73.33	91,297,875	70.40	104	--	--	--
Any Savings (Incl Money Market)	20,367	78.62	99,229,841	76.52	103	58,262.48	58,062.93	100
Traditional Savings Account(s)	19,371	74.77	94,674,805	73.00	102	36,329.48	36,509.02	100
Any Other Type of Savings or Money Market Account(s)	5,919	22.85	28,083,174	21.66	106	83,838.57	85,668.94	98
Non-Traditional Savings Account Type: Money Market	4,158	16.05	19,690,413	15.18	106	78,630.72	79,959.64	98
Certificate(s) of Deposit (CDs)	5,311	20.50	25,000,678	19.28	106	85,509.30	89,522.45	96
ATM/Debit Card								
Pre-Paid Debit Card(s)	5,756	22.22	32,416,691	25.00	89	--	--	--
ATM or Debit Card	21,926	84.64	113,004,183	87.14	97	--	--	--

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	Product Count of Area	% of Area HHs	Product Count of Base	% of Base HHs	Index: %	Average \$ Balance per HH of Area	Average \$ Balance per HH of Base	Index: Average \$
Investment								
Any Investment (Mutual Fund 401(k) 403(b) 457 etc.) Account	13,203	50.97	59,870,139	46.16	110	441,811.69	419,666.31	105
Any Keoughs/HR10s or IRAs	9,716	37.51	42,495,918	32.77	114	370,894.53	365,334.79	102
Brokerage Account(s)	9,225	35.61	43,692,766	33.69	106	--	--	--
Corporate or Municipal Bonds	1,985	7.66	10,180,001	7.85	98	--	--	--
Times bought/sold thru broker in last 90 days - 1-4 times all accounts	3,461	13.36	17,366,903	13.39	100	--	--	--
Times bought/sold thru broker in last 90 days - 5-9 times all accounts	802	3.10	4,225,122	3.26	95	--	--	--
Mutual Funds and ETFs	6,799	26.25	29,995,635	23.13	113	492,758.31	475,325.45	104
Mutual Fund Invested in Stocks	2,263	8.73	10,607,596	8.18	107	404,648.06	371,645.89	109
Mutual Fund Invested in Bonds/Interest-Earning Assets	1,181	4.56	5,662,103	4.37	104	256,221.13	253,051.51	101
Mutual Fund Split Investments (Stocks/Bonds/Interest-Earning Assets)	2,889	11.15	12,343,751	9.52	117	491,424.25	524,213.58	94
Real Estate	4,527	17.48	23,242,444	17.92	98	--	--	--
Publicly-Traded Stocks	7,778	30.02	37,928,335	29.25	103	--	--	--
Publicly-Traded Stock of Current or Former Employer	2,542	9.81	12,810,752	9.88	99	--	--	--
Publicly-Traded Stocks of Other Company	4,872	18.81	23,261,381	17.94	105	--	--	--
Tax-Deferred Savings Plan (Coverdell/529/Education Plan)	2,500	9.65	10,692,280	8.24	117	52,397.43	54,902.49	95
Government Savings Bonds	3,801	14.67	18,021,673	13.90	106	--	--	--
Government Bonds or Treasury Bills	2,358	9.10	11,966,031	9.23	99	--	--	--
Any Pension Retirement (Incl 401(k)) or Tax-Deferred Savings Plan	14,301	55.20	64,508,385	49.74	111	295,542.64	299,892.21	99
Non-Traditional Savings Account Type: Coverdell/Education IRA	736	2.84	3,702,449	2.85	100	65,072.82	66,175.49	98
Non-Traditional Savings Account Type: 529/State Sponsored Education Account	1,913	7.38	7,636,001	5.89	125	47,718.52	47,398.79	101
Retirement Investment								
401(k)	8,371	32.31	38,034,481	29.33	110	244,951.94	235,037.83	104
401(k) Invested in Stocks	1,815	7.01	8,318,950	6.42	109	270,150.95	227,928.34	119
401(k) Invested in Bonds/Interest-Earning Assets	1,177	4.54	5,813,126	4.48	101	139,293.13	141,423.93	98
401(k) Split Investments (Stocks/Bonds/Interest-Earning Assets)	3,642	14.06	16,126,101	12.44	113	294,716.75	310,294.69	95
Roth 401(k)	1,461	5.64	6,400,415	4.93	114	163,710.85	156,057.62	105
403(b)	1,271	4.91	5,236,683	4.04	122	233,872.62	259,048.03	90
Regular or other IRA	6,326	24.42	27,821,739	21.45	114	402,310.82	407,935.04	99
Regular IRA Invested in Stocks	1,351	5.21	6,443,135	4.97	105	--	--	--
Regular IRA Other Investments	1,322	5.10	5,632,212	4.34	118	--	--	--
Roth IRA	4,558	17.59	18,503,330	14.27	123	194,176.93	186,580.65	104
Roth IRA Invested in Stocks	1,140	4.40	5,133,871	3.96	111	--	--	--
Roth IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	2,173	8.39	8,279,371	6.38	131	--	--	--
Roth IRA Other Investments	845	3.26	3,118,111	2.40	136	--	--	--
Rollover IRA	3,391	13.09	14,680,406	11.32	116	352,671.08	363,929.52	97
Rollover IRA Invested in Stocks	782	3.02	3,521,854	2.72	111	--	--	--
Rollover IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	1,682	6.49	7,051,532	5.44	119	--	--	--
Rollover IRA Other Investments	563	2.17	2,324,045	1.79	121	--	--	--
Traditional Pension Plan	5,553	21.43	23,460,550	18.09	118	294,432.27	328,914.67	90

Benchmark: USA

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Index Colors:	<-80	80 -110	110+
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Financial CLOUT® 2025 | Debt Products & Services



Trade Area: 8044 Montgomery Rd - 3 mi.

	Product Count of Area	% of Area HHs	Product Count of Base	% of Base HHs	Index: %	Average \$ Balance per HH of Area	Average \$ Balance per HH of Base	Index: Average \$
Basics								
Population	61,760	100.00	337,643,652	100.00	100	--	--	--
Households	25,906	100.00	129,687,464	100.00	100	--	--	--
Average Household Income	--	140,053.84	--	113,181.00	124	--	--	--
Credit Card								
Visa	16,537	63.84	85,621,377	66.02	97	1,822.03	1,887.76	97
MasterCard	11,054	42.67	54,056,439	41.68	102	1,575.38	1,587.20	99
Discover	4,181	16.14	17,160,515	13.23	122	1,064.70	1,117.63	95
American Express Blue/Credit Card	3,163	12.21	16,313,005	12.58	97	1,533.72	1,439.94	107
Other	1,226	4.73	5,921,750	4.57	104	895.78	809.83	111
Credit								
Auto Loan(s)	8,349	32.23	41,933,058	32.33	100	17,292.71	17,149.41	101
Auto Loan Applied On Own	3,738	14.43	18,893,305	14.57	99	15,121.57	14,901.49	101
Auto Loan Handled By Dealer	4,749	18.33	23,528,643	18.14	101	18,145.72	18,227.29	100
Mortgage	9,561	36.91	44,221,225	34.10	108	168,115.86	203,568.22	83
Second Mortgage	663	2.56	3,323,717	2.56	100	287,297.43	257,414.34	112
Fixed Rate Mortgage	7,611	29.38	34,792,216	26.83	110	184,371.60	245,971.57	75
Adjustable Rate Mortgage	926	3.58	4,138,664	3.19	112	182,590.92	197,948.60	92
Student Loan(s)	4,835	18.66	24,357,505	18.78	99	33,481.40	31,204.79	107
Any Line of Credit (HELOC)	4,256	16.43	22,392,939	17.27	95	14,149.91	13,096.42	108
Home Equity Line of Credit (HELOC)	2,287	8.83	10,197,623	7.86	112	27,988.11	30,790.19	91
Non-HELOC Line of Credit	1,917	7.40	11,876,508	9.16	81	5,439.04	4,300.79	126
Home Equity Loan(s)	1,894	7.31	8,501,557	6.55	112	189,121.84	192,314.96	98
Any Credit (Loan Mortgage Line of Credit Credit Card) Account	23,866	92.13	118,705,784	91.53	101	112,283.10	116,845.30	96

Benchmark: USA

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Index Colors:	<80	80-110	110+
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Trade Area: 8044 Montgomery Rd - 3 mi.

	Product Count of Area	% of Area HHS	Product Count of Base	% of Base HHS	Index: %	Average \$ Balance per HH of Area	Average \$ Balance per HH of Base	Index: Average \$
Basics								
Population	62,326	100.00	345,735,705	100.00	100	--	--	--
Households	26,210	100.00	133,186,678	100.00	100	--	--	--
Average Household Income	--	152,572.24	--	122,965.00	124	--	--	--
Deposits								
Deposit (Checking Savings Money Market CD) Account	24,872	94.89	125,251,156	94.04	101	86,564.53	84,510.89	102
Checking Account(s)	23,974	91.47	120,583,662	90.54	101	15,195.28	15,195.46	100
Direct Deposit	19,419	74.09	94,962,481	71.30	104	--	--	--
Any Savings (Incl Money Market)	20,773	79.26	102,812,539	77.19	103	61,524.92	61,834.10	99
Traditional Savings Account(s)	19,732	75.28	97,927,004	73.53	102	38,267.34	38,738.22	99
Any Other Type of Savings or Money Market Account(s)	6,188	23.61	29,939,830	22.48	105	87,093.18	89,460.40	97
Non-Traditional Savings Account Type: Money Market Account	4,355	16.62	21,036,460	15.79	105	81,604.06	83,363.64	98
Certificate(s) of Deposit (CDs)	5,532	21.11	26,550,553	19.93	106	88,885.65	93,390.84	95
ATM/Debit Card								
Pre-Paid Debit Card(s)	5,626	21.46	32,155,198	24.14	89	--	--	--
ATM or Debit Card	22,139	84.47	115,843,194	86.98	97	--	--	--

Benchmark: USA

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Index Colors:	<80	80 -110	110+
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Trade Area: 8044 Montgomery Rd - 3 mi.

	Product Count of Area	% of Area HHs	Product Count of Base	% of Base HHs	Index: %	Average \$ Balance per HH of Area	Average \$ Balance per HH of Base	Index: Average \$
Investment								
Any Investment (Mutual Fund 401(k) 403(b) 457 etc.) Account	13,634	52.02	62,857,710	47.20	110	467,070.63	445,485.22	105
Any Keoughs/HR10s or IRAs	10,154	38.74	45,360,569	34.06	114	390,993.73	387,657.88	101
Brokerage Account(s)	9,680	36.93	46,745,163	35.10	105	--	--	--
Corporate or Municipal Bonds	2,064	7.88	10,793,532	8.10	97	--	--	--
Times bought/sold thru broker in last 90 days - 1-4 times all accounts	3,595	13.72	18,342,476	13.77	100	--	--	--
Times bought/sold thru broker in last 90 days - 5-9 times all accounts	844	3.22	4,508,249	3.38	95	--	--	--
Mutual Funds and ETFs	7,166	27.34	32,221,495	24.19	113	518,053.91	502,606.48	103
Mutual Fund Invested in Stocks	2,377	9.07	11,374,731	8.54	106	424,846.09	391,085.20	109
Mutual Fund Invested in Bonds/Interest-Earning Assets	1,238	4.72	6,047,024	4.54	104	270,608.16	265,469.12	102
Mutual Fund Split Investments (Stocks/Bonds/Interest-Earning Assets)	3,055	11.66	13,333,681	10.01	116	515,660.55	552,138.90	93
Real Estate	4,706	17.95	24,603,726	18.47	97	--	--	--
Publicly-Traded Stocks	8,126	31.00	40,325,524	30.28	102	--	--	--
Publicly-Traded Stock of Current or Former Employer	2,620	10.00	13,465,409	10.11	99	--	--	--
Publicly-Traded Stocks of Other Company	5,128	19.57	24,929,691	18.72	105	--	--	--
Tax-Deferred Savings Plan (Coverdell/529/Education Plan)	2,604	9.94	11,337,823	8.51	117	54,222.21	56,798.10	95
Government Savings Bonds	3,906	14.90	18,808,845	14.12	106	--	--	--
Government Bonds or Treasury Bills	2,413	9.21	12,451,227	9.35	98	--	--	--
Any Pension Retirement (Incl 401(k)) or Tax-Deferred Savings Plan	14,760	56.31	67,738,226	50.86	111	311,969.67	317,944.15	98
Non-Traditional Savings Account: Coverdell/Education IRA	744	2.84	3,842,638	2.88	98	68,026.43	68,407.36	99
Non-Traditional Savings Account: 529/State Sponsored Education Account	2,004	7.65	8,168,274	6.13	125	49,763.56	49,322.71	101
Retirement Investment								
401(k)	8,536	32.57	39,271,289	29.49	110	256,246.49	246,338.99	104
401(k) Invested in Stocks	1,851	7.06	8,609,997	6.46	109	281,813.98	237,343.59	119
401(k) Invested in Bonds/Interest-Earning Assets	1,189	4.54	5,934,796	4.46	102	145,419.02	148,614.47	98
401(k) Split Investments (Stocks/Bonds/Interest-Earning Assets)	3,748	14.30	16,844,048	12.65	113	306,034.96	321,932.25	95
Roth 401(k)	1,478	5.64	6,560,334	4.93	114	169,933.45	162,767.38	104
403(b)	1,311	5.00	5,510,971	4.14	121	246,704.77	271,698.15	91
Regular or other IRA	6,666	25.43	30,003,174	22.53	113	422,721.88	431,247.51	98
Regular IRA Invested in Stocks	1,422	5.42	6,910,165	5.19	105	--	--	--
Regular IRA Other Investments	1,382	5.27	6,064,026	4.55	116	--	--	--
Roth IRA	4,737	18.07	19,578,245	14.70	123	202,083.73	194,922.31	104
Roth IRA Invested in Stocks	1,186	4.53	5,422,156	4.07	111	--	--	--
Roth IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	2,272	8.67	8,816,423	6.62	131	--	--	--
Roth IRA Other Investments	865	3.30	3,272,945	2.46	134	--	--	--
Rollover IRA	3,536	13.49	15,665,417	11.76	115	370,183.79	383,865.41	96
Rollover IRA Invested in Stocks	807	3.08	3,721,280	2.79	110	--	--	--
Rollover IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	1,780	6.79	7,649,735	5.74	118	--	--	--
Rollover IRA Other Investments	592	2.26	2,471,043	1.85	122	--	--	--
Traditional Pension Plan	5,843	22.29	25,333,244	19.02	117	311,748.38	350,318.11	89

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Index Colors:	<80	80-110	110+
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Trade Area: 8044 Montgomery Rd - 3 mi.

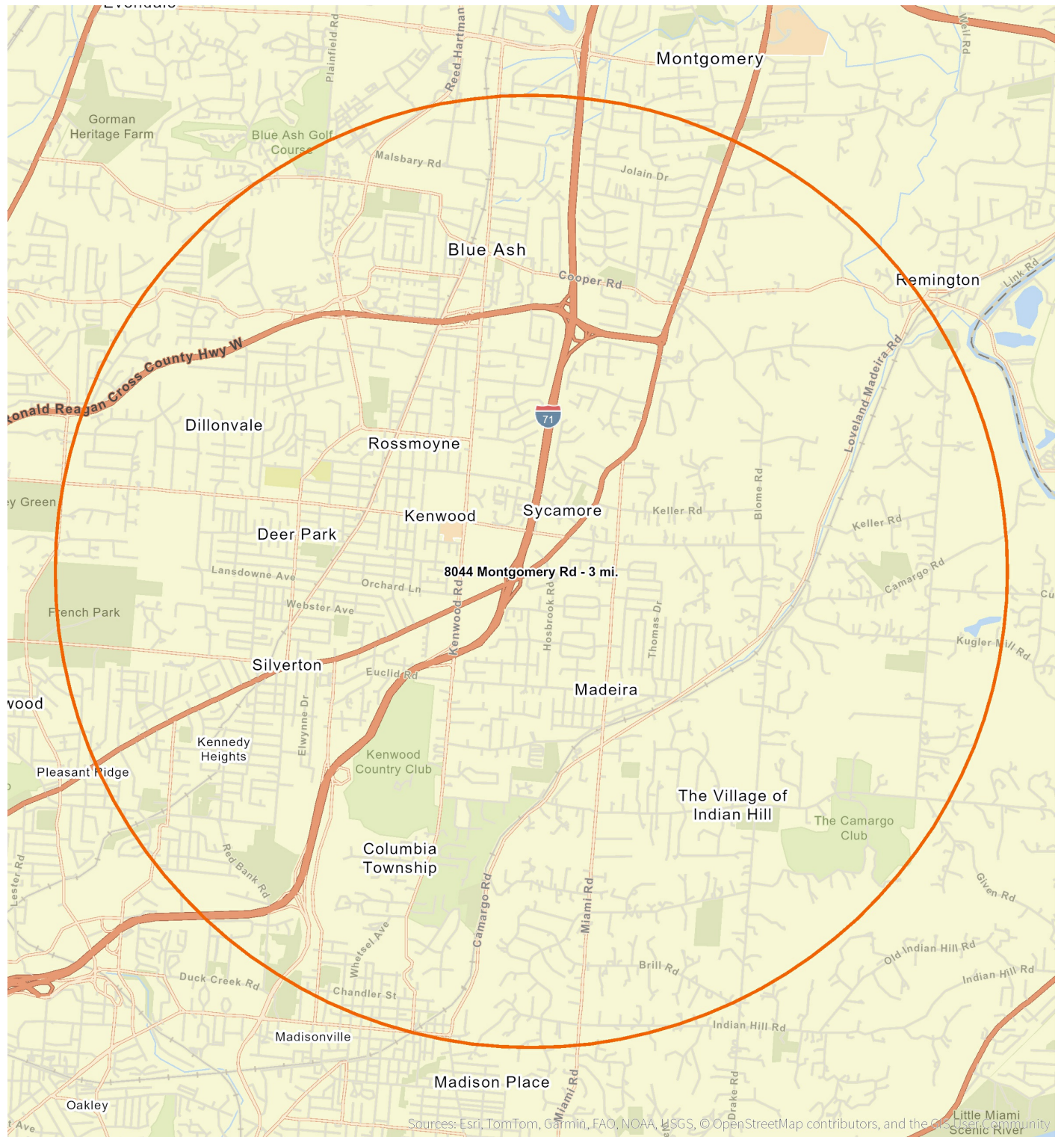
	Product Count of Area	% of Area HHs	Product Count of Base	% of Base HHs	Index: %	Average \$ Balance per HH of Area	Average \$ Balance per HH of Base	Index: Average \$
Basics								
Population	62,326	100.00	345,735,705	100.00	100	--	--	--
Households	26,210	100.00	133,186,678	100.00	100	--	--	--
Average Household Income	--	152,572.24	--	122,965.00	124	--	--	--
Credit Card								
Visa	16,970	64.75	89,133,171	66.92	97	1,816.64	1,890.69	96
MasterCard	11,352	43.31	56,409,871	42.35	102	1,564.99	1,583.56	99
Discover	4,315	16.46	18,038,553	13.54	122	1,041.42	1,093.27	95
American Express Blue/Credit Card	3,342	12.75	17,575,653	13.20	97	1,515.93	1,432.31	106
Other	1,262	4.82	6,241,646	4.69	103	886.02	797.55	111
Credit								
Auto Loan(s)	8,427	32.15	42,968,373	32.26	100	17,595.27	17,497.37	101
Auto Loan Applied On Own	3,754	14.32	19,246,098	14.45	99	15,462.34	15,264.51	101
Auto Loan Handled By Dealer	4,815	18.37	24,256,340	18.21	101	18,390.10	18,516.36	99
Mortgage	9,639	36.78	45,241,660	33.97	108	172,340.62	209,416.88	82
Second Mortgage	669	2.55	3,392,812	2.55	100	294,390.17	265,233.89	111
Fixed Rate Mortgage	7,671	29.27	35,617,473	26.74	109	188,822.97	251,962.60	75
Adjustable Rate Mortgage	920	3.51	4,209,477	3.16	111	190,785.03	205,065.52	93
Student Loan(s)	4,772	18.21	24,317,714	18.26	100	34,021.31	31,858.12	107
Any Line of Credit	4,326	16.50	23,071,983	17.32	95	14,422.94	13,426.95	107
Home Equity Line of Credit (HELOC)	2,329	8.89	10,608,456	7.96	112	28,558.29	31,353.19	91
Non-HELOC Line of Credit	1,934	7.38	12,110,205	9.09	81	5,578.62	4,454.75	125
Home Equity Loan(s)	1,912	7.29	8,771,354	6.59	111	192,464.45	195,682.36	98
Any Credit (Loan Mortgage Line of Credit Credit Card) Account	24,284	92.65	122,544,140	92.01	101	113,541.69	118,810.88	96

Benchmark: USA

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Index Colors:	<80	80 -110	110+
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Trade Area: 8044 Montgomery Rd - 3 mi.



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Trade Area: 8044 Montgomery Rd - 5 mi.

	Product Count of Area	% of Area HHs	Product Count of Base	% of Base HHs	Index: %	Average \$ Balance per HH of Area	Average \$ Balance per HH of Base	Index: Average \$
Basics								
Population	160,106	100.00	337,643,652	100.00	100	--	--	--
Households	70,540	100.00	129,687,464	100.00	100	--	--	--
Average Household Income	--	126,780.33	--	113,181.00	112	--	--	--
Deposits								
Deposit (Checking Savings Money Market CD) Account	66,269	93.94	121,547,251	93.72	100	71,546.63	79,019.27	91
Checking Account(s)	63,736	90.35	116,928,225	90.16	100	12,845.74	14,348.04	90
Direct Deposit	50,649	71.80	91,297,875	70.40	102	--	--	--
Any Savings (Incl Money Market)	54,271	76.94	99,229,841	76.52	101	51,340.04	58,062.93	88
Traditional Savings Account(s)	51,695	73.28	94,674,805	73.00	100	32,167.42	36,509.02	88
Any Other Type of Savings or Money Market Account(s)	14,819	21.01	28,083,174	21.66	97	76,366.66	85,668.94	89
Non-Traditional Savings Account Type: Money Market	10,323	14.63	19,690,413	15.18	96	71,801.22	79,959.64	90
Certificate(s) of Deposit (CDs)	13,258	18.80	25,000,678	19.28	97	78,628.39	89,522.45	88
ATM/Debit Card								
Pre-Paid Debit Card(s)	16,775	23.78	32,416,691	25.00	95	--	--	--
ATM or Debit Card	59,925	84.95	113,004,183	87.14	97	--	--	--

Benchmark: USA

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Index Colors:	<80	80 - 110	110+
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Trade Area: 8044 Montgomery Rd - 5 mi.

	Product Count of Area	% of Area HHs	Product Count of Base	% of Base HHs	Index: %	Average \$ Balance per HH of Area	Average \$ Balance per HH of Base	Index: Average \$
Investment								
Any Investment (Mutual Fund 401(k) 403(b) 457 etc.) Account	33,957	48.14	59,870,139	46.16	104	390,286.21	419,666.31	93
Any Keoughs/HR10s or IRAs	24,262	34.40	42,495,918	32.77	105	333,375.30	365,334.79	91
Brokerage Account(s)	23,139	32.80	43,692,766	33.69	97	--	--	--
Corporate or Municipal Bonds	5,039	7.14	10,180,001	7.85	91	--	--	--
Times bought/sold thru broker in last 90 days - 1-4 times all accounts	8,857	12.56	17,366,903	13.39	94	--	--	--
Times bought/sold thru broker in last 90 days - 5-9 times all accounts	2,020	2.86	4,225,122	3.26	88	--	--	--
Mutual Funds and ETFs	16,845	23.88	29,995,635	23.13	103	444,952.90	475,325.45	94
Mutual Fund Invested in Stocks	5,580	7.91	10,607,596	8.18	97	364,468.08	371,645.89	98
Mutual Fund Invested in Bonds/Interest-Earning Assets	2,947	4.18	5,662,103	4.37	96	240,975.31	253,051.51	95
Mutual Fund Split Investments (Stocks/Bonds/Interest-Earning Assets)	7,093	10.05	12,343,751	9.52	106	446,751.27	524,213.58	85
Real Estate	11,377	16.13	23,242,444	17.92	90	--	--	--
Publicly-Traded Stocks	19,810	28.08	37,928,335	29.25	96	--	--	--
Publicly-Traded Stock of Current or Former Employer	6,444	9.13	12,810,752	9.88	92	--	--	--
Publicly-Traded Stocks of Other Company	12,330	17.48	23,261,381	17.94	97	--	--	--
Tax-Deferred Savings Plan (Coverdell/529/Education Plan)	6,084	8.63	10,692,280	8.24	105	47,730.04	54,902.49	87
Government Savings Bonds	9,768	13.85	18,021,673	13.90	100	--	--	--
Government Bonds or Treasury Bills	6,091	8.63	11,966,031	9.23	94	--	--	--
Any Pension Retirement (Incl 401(k)) or Tax-Deferred Savings Plan	36,757	52.11	64,508,385	49.74	105	260,837.40	299,892.21	87
Non-Traditional Savings Account Type: Coverdell/Education IRA	1,859	2.63	3,702,449	2.85	92	58,642.55	66,175.49	89
Non-Traditional Savings Account Type: 529/State Sponsored Education Account	4,566	6.47	7,636,001	5.89	110	43,653.83	47,398.79	92
Retirement Investment								
401(k)	21,907	31.06	38,034,481	29.33	106	214,964.56	235,037.83	91
401(k) Invested in Stocks	4,656	6.60	8,318,950	6.42	103	240,234.56	227,928.34	105
401(k) Invested in Bonds/Interest-Earning Assets	3,143	4.46	5,813,126	4.48	99	122,717.03	141,423.93	87
401(k) Split Investments (Stocks/Bonds/Interest-Earning Assets)	9,247	13.11	16,126,101	12.44	105	261,829.05	310,294.69	84
Roth 401(k)	3,884	5.51	6,400,415	4.93	112	144,390.31	156,057.62	93
403(b)	3,204	4.54	5,236,683	4.04	112	209,515.48	259,048.03	81
Regular or other IRA	15,547	22.04	27,821,739	21.45	103	365,695.60	407,935.04	90
Regular IRA Invested in Stocks	3,346	4.74	6,443,135	4.97	95	--	--	--
Regular IRA Other Investments	3,260	4.62	5,632,212	4.34	106	--	--	--
Roth IRA	11,468	16.26	18,503,330	14.27	114	174,396.87	186,580.65	93
Roth IRA Invested in Stocks	2,865	4.06	5,133,871	3.96	103	--	--	--
Roth IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	5,392	7.64	8,279,371	6.38	120	--	--	--
Roth IRA Other Investments	2,150	3.05	3,118,111	2.40	127	--	--	--
Rollover IRA	8,401	11.91	14,680,406	11.32	105	319,884.80	363,929.52	88
Rollover IRA Invested in Stocks	1,957	2.77	3,521,854	2.72	102	--	--	--
Rollover IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	4,068	5.77	7,051,532	5.44	106	--	--	--
Rollover IRA Other Investments	1,412	2.00	2,324,045	1.79	112	--	--	--
Traditional Pension Plan	13,728	19.46	23,460,550	18.09	108	265,722.41	328,914.67	81

Benchmark: USA

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Index Colors:	<-80	80 -110	110+
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Financial CLOUT® 2025 | Debt Products & Services



Trade Area: 8044 Montgomery Rd - 5 mi.

	Product Count of Area	% of Area HHs	Product Count of Base	% of Base HHs	Index: %	Average \$ Balance per HH of Area	Average \$ Balance per HH of Base	Index: Average \$
Basics								
Population	160,106	100.00	337,643,652	100.00	100	--	--	--
Households	70,540	100.00	129,687,464	100.00	100	--	--	--
Average Household Income	--	126,780.33	--	113,181.00	112	--	--	--
Credit Card								
Visa	43,581	61.78	85,621,377	66.02	94	1,745.07	1,887.76	92
MasterCard	29,035	41.16	54,056,439	41.68	99	1,496.18	1,587.20	94
Discover	10,749	15.24	17,160,515	13.23	115	1,097.29	1,117.63	98
American Express Blue/Credit Card	7,864	11.15	16,313,005	12.58	89	1,450.10	1,439.94	101
Other	3,204	4.54	5,921,750	4.57	99	866.98	809.83	107
Credit								
Auto Loan(s)	22,472	31.86	41,933,058	32.33	99	16,320.37	17,149.41	95
Auto Loan Applied On Own	9,975	14.14	18,893,305	14.57	97	14,013.94	14,901.49	94
Auto Loan Handled By Dealer	12,792	18.13	23,528,643	18.14	100	17,361.15	18,227.29	95
Mortgage	23,214	32.91	44,221,225	34.10	97	160,137.08	203,568.22	79
Second Mortgage	1,570	2.23	3,323,717	2.56	87	270,292.25	257,414.34	105
Fixed Rate Mortgage	18,177	25.77	34,792,216	26.83	96	178,486.62	245,971.57	73
Adjustable Rate Mortgage	2,203	3.12	4,138,664	3.19	98	172,253.68	197,948.60	87
Student Loan(s)	14,227	20.17	24,357,505	18.78	107	32,183.31	31,204.79	103
Any Line of Credit (HELOC)	11,704	16.59	22,392,939	17.27	96	12,441.48	13,096.42	95
Home Equity Line of Credit (HELOC)	5,401	7.66	10,197,623	7.86	97	26,552.46	30,790.19	86
Non-HELOC Line of Credit	6,148	8.72	11,876,508	9.16	95	4,896.28	4,300.79	114
Home Equity Loan(s)	4,471	6.34	8,501,557	6.55	97	181,871.90	192,314.96	95
Any Credit (Loan Mortgage Line of Credit Credit Card) Account	64,060	90.81	118,705,784	91.53	99	99,224.42	116,845.30	85

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Index Colors:	<80	80 -110	110+
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Trade Area: 8044 Montgomery Rd - 5 mi.

	Product Count of Area	% of Area HHs	Product Count of Base	% of Base HHs	Index: %	Average \$ Balance per HH of Area	Average \$ Balance per HH of Base	Index: Average \$
Basics								
Population	161,982	100.00	345,735,705	100.00	100	--	--	--
Households	71,619	100.00	133,186,678	100.00	100	--	--	--
Average Household Income	--	138,212.31	--	122,965.00	112	--	--	--
Deposits								
Deposit (Checking Savings Money Market CD) Account	67,502	94.25	125,251,156	94.04	100	76,178.60	84,510.89	90
Checking Account(s)	64,977	90.73	120,583,662	90.54	100	13,549.38	15,195.46	89
Direct Deposit	52,012	72.62	94,962,481	71.30	102	--	--	--
Any Savings (Incl Money Market)	55,555	77.57	102,812,539	77.19	100	54,531.02	61,834.10	88
Traditional Savings Account(s)	52,837	73.78	97,927,004	73.53	100	34,088.78	38,738.22	88
Any Other Type of Savings or Money Market Account(s)	15,586	21.76	29,939,830	22.48	97	79,604.40	89,460.40	89
Non-Traditional Savings Account Type: Money Market Account	10,869	15.18	21,036,460	15.79	96	74,800.56	83,363.64	90
Certificate(s) of Deposit (CDs)	13,871	19.37	26,550,553	19.93	97	81,980.51	93,390.84	88
ATM/Debit Card								
Pre-Paid Debit Card(s)	16,465	22.99	32,155,198	24.14	95	--	--	--
ATM or Debit Card	60,738	84.81	115,843,194	86.98	98	--	--	--

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Index Colors:	<80	80 -110	110+
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Trade Area: 8044 Montgomery Rd - 5 mi.

	Product Count of Area	% of Area HHs	Product Count of Base	% of Base HHs	Index: %	Average \$ Balance per HH of Area	Average \$ Balance per HH of Base	Index: Average \$
Investment								
Any Investment (Mutual Fund 401(k) 403(b) 457 etc.) Account	35,238	49.20	62,857,710	47.20	104	414,810.41	445,485.22	93
Any Keoughs/HR10s or IRAs	25,489	35.59	45,360,569	34.06	104	352,646.57	387,657.88	91
Brokerage Account(s)	24,417	34.09	46,745,163	35.10	97	--	--	--
Corporate or Municipal Bonds	5,256	7.34	10,793,532	8.10	91	--	--	--
Times bought/sold thru broker in last 90 days - 1-4 times all accounts	9,223	12.88	18,342,476	13.77	94	--	--	--
Times bought/sold thru broker in last 90 days - 5-9 times all accounts	2,119	2.96	4,508,249	3.38	87	--	--	--
Mutual Funds and ETFs	17,830	24.90	32,221,495	24.19	103	470,440.26	502,606.48	94
Mutual Fund Invested in Stocks	5,895	8.23	11,374,731	8.54	96	383,239.25	391,085.20	98
Mutual Fund Invested in Bonds/Interest-Earning Assets	3,100	4.33	6,047,024	4.54	95	257,946.01	265,469.12	97
Mutual Fund Split Investments (Stocks/Bonds/Interest-Earning Assets)	7,541	10.53	13,333,681	10.01	105	470,840.94	552,138.90	85
Real Estate	11,847	16.54	24,603,726	18.47	90	--	--	--
Publicly-Traded Stocks	20,777	29.01	40,325,524	30.28	96	--	--	--
Publicly-Traded Stock of Current or Former Employer	6,670	9.31	13,465,409	10.11	92	--	--	--
Publicly-Traded Stocks of Other Company	13,039	18.21	24,929,691	18.72	97	--	--	--
Tax-Deferred Savings Plan (Coverdell/529/Education Plan)	6,358	8.88	11,337,823	8.51	104	49,752.08	56,798.10	88
Government Savings Bonds	10,053	14.04	18,808,845	14.12	99	--	--	--
Government Bonds or Treasury Bills	6,247	8.72	12,451,227	9.35	93	--	--	--
Any Pension Retirement (Incl 401(k)) or Tax-Deferred Savings Plan	38,127	53.24	67,738,226	50.86	105	276,685.17	317,944.15	87
Non-Traditional Savings Account: Coverdell/Education IRA	1,901	2.65	3,842,638	2.88	92	61,113.45	68,407.36	89
Non-Traditional Savings Account: 529/State Sponsored Education Account	4,817	6.73	8,168,274	6.13	110	45,689.42	49,322.71	93
Retirement Investment								
401(k)	22,446	31.34	39,271,289	29.49	106	226,541.85	246,338.99	92
401(k) Invested in Stocks	4,769	6.66	8,609,997	6.46	103	252,589.07	237,343.59	106
401(k) Invested in Bonds/Interest-Earning Assets	3,173	4.43	5,934,796	4.46	99	129,285.79	148,614.47	87
401(k) Split Investments (Stocks/Bonds/Interest-Earning Assets)	9,595	13.40	16,844,048	12.65	106	273,373.69	321,932.25	85
Roth 401(k)	3,941	5.50	6,560,334	4.93	112	151,116.78	162,767.38	93
403(b)	3,332	4.65	5,510,971	4.14	112	221,160.40	271,698.15	81
Regular or other IRA	16,477	23.01	30,003,174	22.53	102	385,109.97	431,247.51	89
Regular IRA Invested in Stocks	3,529	4.93	6,910,165	5.19	95	--	--	--
Regular IRA Other Investments	3,438	4.80	6,064,026	4.55	105	--	--	--
Roth IRA	11,977	16.72	19,578,245	14.70	114	182,309.26	194,922.31	94
Roth IRA Invested in Stocks	2,998	4.19	5,422,156	4.07	103	--	--	--
Roth IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	5,669	7.92	8,816,423	6.62	120	--	--	--
Roth IRA Other Investments	2,225	3.11	3,272,945	2.46	126	--	--	--
Rollover IRA	8,799	12.29	15,665,417	11.76	104	336,604.14	383,865.41	88
Rollover IRA Invested in Stocks	2,025	2.83	3,721,280	2.79	101	--	--	--
Rollover IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	4,335	6.05	7,649,735	5.74	105	--	--	--
Rollover IRA Other Investments	1,483	2.07	2,471,043	1.85	112	--	--	--
Traditional Pension Plan	14,533	20.29	25,333,244	19.02	107	281,685.42	350,318.11	80

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Financial CLOUT® 2030 | Debt Products & Services



Trade Area: 8044 Montgomery Rd - 5 mi.

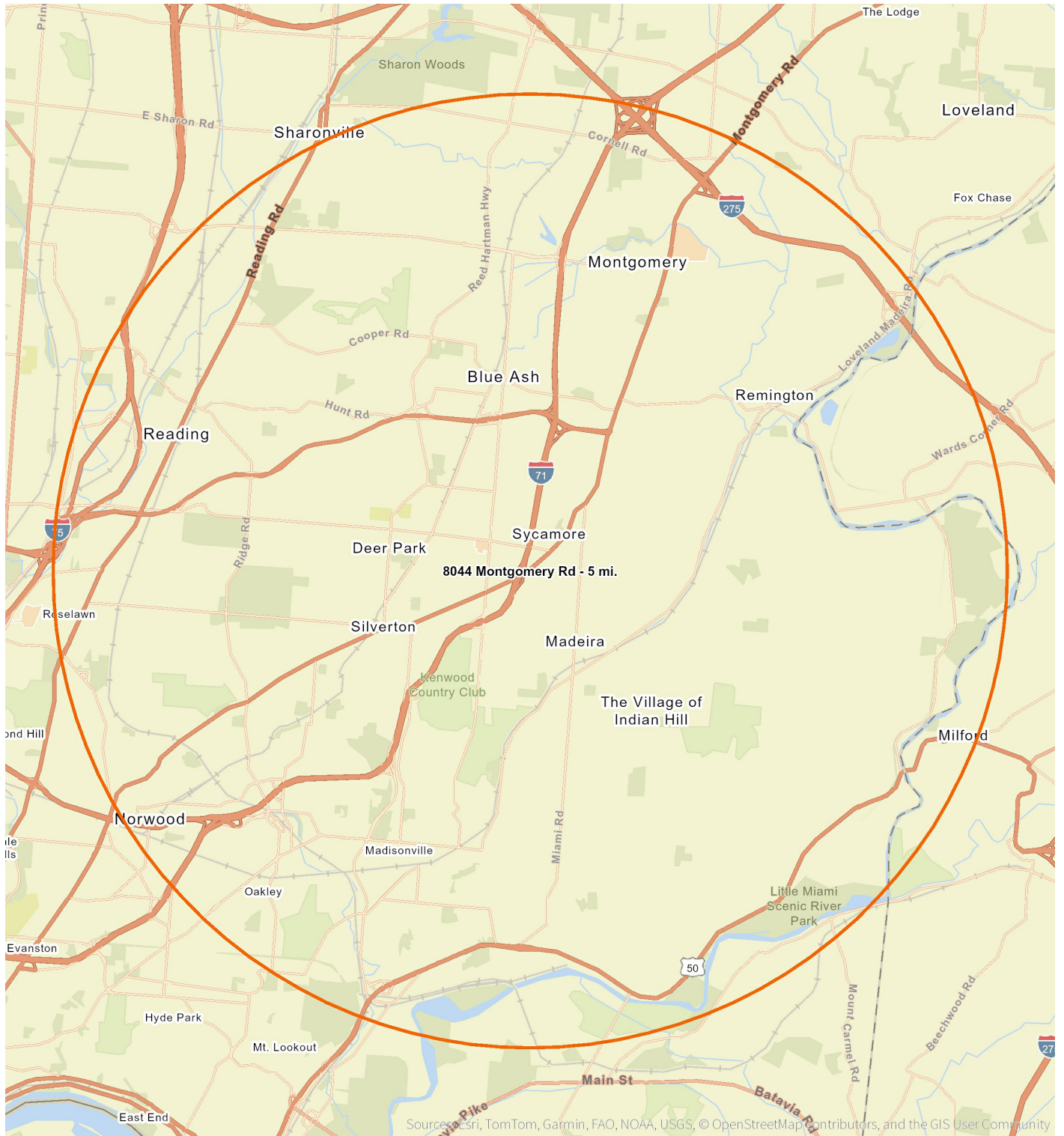
	Product Count of Area	% of Area HHs	Product Count of Base	% of Base HHs	Index: %	Average \$ Balance per HH of Area	Average \$ Balance per HH of Base	Index: Average \$
Basics								
Population	161,982	100.00	345,735,705	100.00	100	--	--	--
Households	71,619	100.00	133,186,678	100.00	100	--	--	--
Average Household Income	--	138,212.31	--	122,965.00	112	--	--	--
Credit Card								
Visa	44,900	62.69	89,133,171	66.92	94	1,747.38	1,890.69	92
MasterCard	29,960	41.83	56,409,871	42.35	99	1,490.27	1,583.56	94
Discover	11,129	15.54	18,038,553	13.54	115	1,077.29	1,093.27	99
American Express Blue/Credit Card	8,368	11.68	17,575,653	13.20	89	1,443.53	1,432.31	101
Other	3,325	4.64	6,241,646	4.69	99	859.52	797.55	108
Credit								
Auto Loan(s)	22,738	31.75	42,968,373	32.26	98	16,668.17	17,497.37	95
Auto Loan Applied On Own	10,030	14.01	19,246,098	14.45	97	14,414.35	15,264.51	94
Auto Loan Handled By Dealer	13,019	18.18	24,256,340	18.21	100	17,637.17	18,516.36	95
Mortgage	23,443	32.73	45,241,660	33.97	96	164,676.33	209,416.88	79
Second Mortgage	1,569	2.19	3,392,812	2.55	86	282,460.27	265,233.89	106
Fixed Rate Mortgage	18,358	25.63	35,617,473	26.74	96	182,607.35	251,962.60	72
Adjustable Rate Mortgage	2,200	3.07	4,209,477	3.16	97	180,627.62	205,065.52	88
Student Loan(s)	14,058	19.63	24,317,714	18.26	108	32,825.86	31,858.12	103
Any Line of Credit	11,900	16.62	23,071,983	17.32	96	12,761.03	13,426.95	95
Home Equity Line of Credit (HELOC)	5,510	7.69	10,608,456	7.96	97	27,432.50	31,353.19	87
Non-HELOC Line of Credit	6,210	8.67	12,110,205	9.09	95	5,031.09	4,454.75	113
Home Equity Loan(s)	4,528	6.32	8,771,354	6.59	96	185,950.56	195,682.36	95
Any Credit (Loan Mortgage Line of Credit Credit Card) Account	65,404	91.32	122,544,140	92.01	99	100,711.30	118,810.88	85

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Index Colors:	<80	80 -110	110+
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Trade Area: 8044 Montgomery Rd - 5 mi.



Report Details

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Trade Area

Name	Level	Geographies
8044 Montgomery Rd - 1 mi.		N/A
8044 Montgomery Rd - 3 mi.		N/A
8044 Montgomery Rd - 5 mi.		N/A

Benchmark

Name	Level	Geographies
USA	Entire US	United States

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