

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	11,900	100.00	342,965,686	100.00	100	--	--	--
Households	4,573	100.00	131,761,051	100.00	100	--	--	--
Average Household Income	--	185,867.27	--	124,101.00	150	--	--	--
Deposits								
Deposit (Checking Savings Money Market CD) Account	4,385	95.89	124,143,249	94.22	102	96,789.06	85,353.58	113
Checking Account(s)	4,236	92.63	119,387,564	90.61	102	15,893.82	14,602.47	109
Direct Deposit	3,461	75.68	93,601,319	71.04	107	--	--	--
Any Savings (Incl Money Market)	3,764	82.31	102,505,024	77.80	106	65,732.47	60,377.67	109
Traditional Savings Account(s)	3,571	78.09	97,816,571	74.24	105	40,707.84	38,015.07	107
Any Other Type of Savings or Money Market Account(s)	1,175	25.69	29,477,054	22.37	115	89,243.08	86,705.48	103
Non-Traditional Savings Account Type: Money Market	845	18.48	20,892,026	15.86	117	81,413.87	79,579.63	102
Certificate(s) of Deposit (CDs)	1,159	25.34	28,792,272	21.85	116	95,525.03	96,141.40	99
ATM/Debit Card								
Pre-Paid Debit Card(s)	891	19.48	31,438,053	23.86	82	--	--	--
ATM or Debit Card	3,877	84.78	115,166,767	87.41	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	2,535	55.43	62,529,570	47.46	117	464,846.00	426,821.36	109
Any Keoughs/HR10s or IRAs	1,879	41.09	44,167,539	33.52	123	390,301.03	379,922.63	103
Brokerage Account(s)	1,777	38.86	45,458,493	34.50	113	--	--	--
Corporate or Municipal Bonds	350	7.65	9,650,792	7.33	104	--	--	--
Times bought/sold thru broker in last 90 days - 1-4 times all accounts	646	14.13	17,840,161	13.54	104	--	--	--
Times bought/sold thru broker in last 90 days - 5-9 times all accounts	159	3.48	4,509,934	3.42	102	--	--	--
Mutual Funds and ETFs	1,282	28.03	30,349,678	23.03	122	478,889.03	478,023.95	100
Mutual Fund Invested in Stocks	413	9.03	10,435,727	7.92	114	406,561.25	360,161.59	113
Mutual Fund Invested in Bonds/Interest-Earning Assets	213	4.66	5,541,208	4.21	111	245,355.65	247,843.76	99
Mutual Fund Split Investments (Stocks/Bonds/Interest-Earning Assets)	566	12.38	12,882,572	9.78	127	525,899.22	543,093.07	97
Real Estate	820	17.93	22,761,779	17.27	104	--	--	--
Publicly-Traded Stocks	1,430	31.27	38,167,790	28.97	108	--	--	--
Publicly-Traded Stock of Current or Former Employer	452	9.88	12,687,101	9.63	103	--	--	--
Publicly-Traded Stocks of Other Company	903	19.75	23,664,995	17.96	110	--	--	--
Tax-Deferred Savings Plan (Coverdell/529/Education Plan)	514	11.24	11,060,218	8.39	134	55,419.08	58,118.77	95
Government Savings Bonds	692	15.13	17,925,304	13.60	111	--	--	--
Government Bonds or Treasury Bills	441	9.64	12,324,275	9.35	103	--	--	--
Any Pension Retirement (Incl 401(k)) or Tax-Deferred Savings Plan	2,770	60.57	67,724,436	51.40	118	327,845.46	313,912.59	104
Non-Traditional Savings Account Type: Coverdell/Education IRA	122	2.67	3,543,755	2.69	99	74,869.77	68,230.58	110
Non-Traditional Savings Account Type: 529/State Sponsored Education Account	416	9.10	8,139,566	6.18	147	48,163.55	48,664.14	99
Retirement Investment								
401(k)	1,637	35.80	40,658,749	30.86	116	277,502.67	241,900.56	115
401(k) Invested in Stocks	347	7.59	8,577,895	6.51	117	289,871.48	234,084.07	124
401(k) Invested in Bonds/Interest-Earning Assets	238	5.21	6,342,962	4.81	108	144,311.45	139,996.50	103
401(k) Split Investments (Stocks/Bonds/Interest-Earning Assets)	738	16.14	17,245,653	13.09	123	332,415.82	322,761.92	103
Roth 401(k)	289	6.32	6,966,761	5.29	120	184,718.31	159,683.73	116
403(b)	245	5.36	5,567,877	4.23	127	244,082.83	268,957.63	91
Regular or other IRA	1,215	26.57	28,642,598	21.74	122	424,384.78	429,522.39	99
Regular IRA Invested in Stocks	250	5.47	6,457,011	4.90	112	--	--	--
Regular IRA Other Investments	249	5.45	5,743,025	4.36	125	--	--	--
Roth IRA	897	19.61	19,801,449	15.03	131	212,604.78	194,381.20	109
Roth IRA Invested in Stocks	213	4.66	5,272,832	4.00	116	--	--	--
Roth IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	435	9.51	8,964,924	6.80	140	--	--	--
Roth IRA Other Investments	167	3.65	3,479,112	2.64	138	--	--	--
Rollover IRA	642	14.04	15,016,186	11.40	123	372,613.23	379,670.60	98
Rollover IRA Invested in Stocks	138	3.02	3,446,539	2.62	115	--	--	--
Rollover IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	329	7.19	7,345,748	5.58	129	--	--	--
Rollover IRA Other Investments	106	2.32	2,374,932	1.80	129	--	--	--
Traditional Pension Plan	1,075	23.51	24,326,773	18.46	127	318,007.26	352,726.38	90

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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	11,900	100.00	342,965,686	100.00	100	--	--	--
Households	4,573	100.00	131,761,051	100.00	100	--	--	--
Average Household Income	--	185,867.27	--	124,101.00	150	--	--	--
Credit Card								
Visa	3,042	66.52	87,230,987	66.20	100	1,780.53	1,798.02	99
MasterCard	2,097	45.86	57,465,835	43.61	105	1,665.15	1,573.80	106
Discover	789	17.25	17,616,773	13.37	129	1,135.83	1,169.27	97
American Express Blue/Credit Card	608	13.29	16,999,812	12.90	103	1,545.29	1,330.42	116
Other	235	5.14	6,308,372	4.79	107	836.04	760.51	110
Credit								
Auto Loan(s)	1,521	33.26	41,820,952	31.74	105	18,808.67	17,611.07	107
Auto Loan Applied On Own	685	14.98	18,719,198	14.21	105	15,696.46	14,881.71	105
Auto Loan Handled By Dealer	878	19.20	23,625,156	17.93	107	19,947.82	18,963.45	105
Mortgage	1,861	40.70	44,909,748	34.08	119	170,321.54	204,336.01	83
Second Mortgage	117	2.56	3,045,615	2.31	111	210,685.03	246,557.02	85
Fixed Rate Mortgage	1,514	33.11	35,612,462	27.03	122	197,126.17	255,822.27	77
Adjustable Rate Mortgage	173	3.78	3,971,715	3.01	126	190,223.71	206,319.48	92
Student Loan(s)	807	17.65	24,057,106	18.26	97	34,548.88	30,980.75	112
Any Line of Credit (HELOC)	735	16.07	22,176,987	16.83	95	15,352.50	12,454.54	123
Home Equity Line of Credit (HELOC)	428	9.36	9,822,455	7.46	126	29,473.16	30,100.75	98
Non-HELOC Line of Credit	296	6.47	12,051,545	9.15	71	4,879.99	4,022.77	121
Home Equity Loan(s)	363	7.94	8,228,555	6.25	127	159,039.66	175,175.22	91
Any Credit (Loan Mortgage Line of Credit Credit Card) Account	4,311	94.27	121,296,972	92.06	102	116,556.53	113,800.37	102

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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	11,905	100.00	351,802,157	100.00	100	--	--	--
Households	4,560	100.00	135,556,487	100.00	100	--	--	--
Average Household Income	--	205,579.83	--	138,445.00	148	--	--	--
Deposits								
Deposit (Checking Savings Money Market CD) Account	4,382	96.10	128,237,519	94.60	102	103,566.51	92,395.54	112
Checking Account(s)	4,238	92.94	123,430,000	91.05	102	16,725.16	15,614.86	107
Direct Deposit	3,479	76.29	97,574,250	71.98	106	--	--	--
Any Savings (Incl Money Market)	3,784	82.98	106,683,754	78.70	105	69,971.72	64,879.36	108
Traditional Savings Account(s)	3,591	78.75	101,627,153	74.97	105	43,067.30	40,711.35	106
Any Other Type of Savings or Money Market Account(s)	1,216	26.67	31,733,604	23.41	114	93,549.87	90,911.06	103
Non-Traditional Savings Account Type: Money Market Account	880	19.30	22,557,650	16.64	116	84,951.47	83,283.43	102
Certificate(s) of Deposit (CDs)	1,200	26.32	30,912,466	22.80	115	100,027.94	101,034.08	99
ATM/Debit Card								
Pre-Paid Debit Card(s)	857	18.79	30,993,139	22.86	82	--	--	--
ATM or Debit Card	3,860	84.65	118,317,233	87.28	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	2,590	56.80	66,237,701	48.86	116	496,360.02	455,677.07	109
Any Keoughs/HR10s or IRAs	1,946	42.67	47,588,376	35.11	122	418,203.45	406,033.34	103
Brokerage Account(s)	1,851	40.59	49,139,341	36.25	112	--	--	--
Corporate or Municipal Bonds	359	7.87	10,301,164	7.60	104	--	--	--
Times bought/sold thru broker in last 90 days - 1-4 times all accounts	662	14.52	19,046,227	14.05	103	--	--	--
Times bought/sold thru broker in last 90 days - 5-9 times all accounts	166	3.64	4,871,124	3.59	101	--	--	--
Mutual Funds and ETFs	1,335	29.28	32,954,839	24.31	120	510,304.75	507,479.04	101
Mutual Fund Invested in Stocks	431	9.45	11,321,031	8.35	113	431,110.81	381,975.58	113
Mutual Fund Invested in Bonds/Interest-Earning Assets	220	4.83	5,969,180	4.40	110	252,527.66	257,996.43	98
Mutual Fund Split Investments (Stocks/Bonds/Interest-Earning Assets)	596	13.07	14,080,097	10.39	126	556,140.32	573,426.22	97
Real Estate	840	18.42	24,309,112	17.93	103	--	--	--
Publicly-Traded Stocks	1,478	32.41	40,985,797	30.23	107	--	--	--
Publicly-Traded Stock of Current or Former Employer	460	10.09	13,439,163	9.91	102	--	--	--
Publicly-Traded Stocks of Other Company	946	20.75	25,667,942	18.93	110	--	--	--
Tax-Deferred Savings Plan (Coverdell/529/Education Plan)	528	11.58	11,843,909	8.74	133	57,492.22	60,257.28	95
Government Savings Bonds	704	15.44	18,826,139	13.89	111	--	--	--
Government Bonds or Treasury Bills	447	9.80	12,938,806	9.54	103	--	--	--
Any Pension Retirement (Incl 401(k)) or Tax-Deferred Savings Plan	2,825	61.95	71,722,700	52.91	117	351,792.95	336,055.67	105
Non-Traditional Savings Account: Coverdell/Education IRA	126	2.76	3,692,138	2.72	101	75,217.22	71,035.78	106
Non-Traditional Savings Account: 529/State Sponsored Education Account	434	9.52	8,803,323	6.49	147	50,134.30	50,666.35	99
Retirement Investment								
401(k)	1,649	36.16	42,358,054	31.25	116	292,280.88	254,713.06	115
401(k) Invested in Stocks	347	7.61	8,931,352	6.59	115	304,506.96	244,123.70	125
401(k) Invested in Bonds/Interest-Earning Assets	234	5.13	6,505,096	4.80	107	152,317.76	148,282.83	103
401(k) Split Investments (Stocks/Bonds/Interest-Earning Assets)	754	16.54	18,224,673	13.44	123	345,681.43	335,516.66	103
Roth 401(k)	286	6.27	7,190,064	5.30	118	191,911.76	167,239.36	115
403(b)	255	5.59	5,938,560	4.38	128	258,495.58	286,054.57	90
Regular or other IRA	1,268	27.81	31,194,729	23.01	121	454,629.56	456,922.10	99
Regular IRA Invested in Stocks	261	5.72	6,987,090	5.15	111	--	--	--
Regular IRA Other Investments	260	5.70	6,221,003	4.59	124	--	--	--
Roth IRA	925	20.29	21,183,891	15.63	130	223,918.26	204,654.76	109
Roth IRA Invested in Stocks	221	4.85	5,636,185	4.16	117	--	--	--
Roth IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	454	9.96	9,648,973	7.12	140	--	--	--
Roth IRA Other Investments	173	3.79	3,687,620	2.72	139	--	--	--
Rollover IRA	663	14.54	16,162,759	11.92	122	397,593.72	402,781.31	99
Rollover IRA Invested in Stocks	143	3.14	3,669,583	2.71	116	--	--	--
Rollover IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	346	7.59	8,052,035	5.94	128	--	--	--
Rollover IRA Other Investments	112	2.46	2,539,557	1.87	131	--	--	--
Traditional Pension Plan	1,121	24.58	26,494,024	19.55	126	344,997.59	380,371.65	91

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Trade Area: 8044 Montgomery Rd - 1 mi.

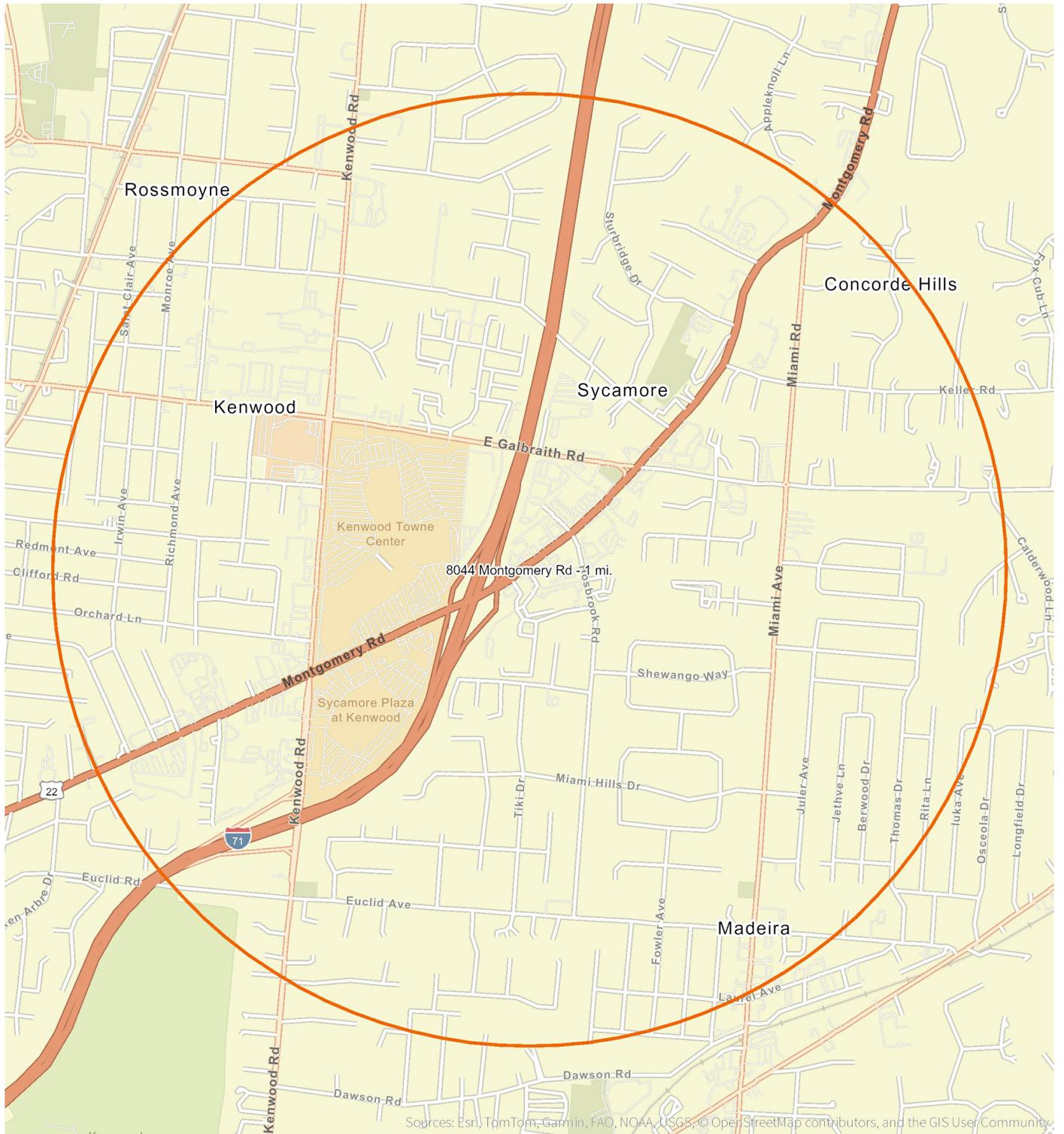
	Product Count of Area	% of Area HHs	Product Count of Base	% of Base HHs	Index: %	Average \$ Balance per HH of Area	Average \$ Balance per HH of Base	Index: Average \$
Basics								
Population	11,905	100.00	351,802,157	100.00	100	--	--	--
Households	4,560	100.00	135,556,487	100.00	100	--	--	--
Average Household Income	--	205,579.83	--	138,445.00	148	--	--	--
Credit Card								
Visa	3,075	67.43	91,237,242	67.31	100	1,762.57	1,798.68	98
MasterCard	2,118	46.45	60,179,688	44.40	105	1,635.93	1,567.83	104
Discover	808	17.72	18,579,297	13.71	129	1,106.78	1,139.07	97
American Express Blue/Credit Card	632	13.86	18,478,955	13.63	102	1,505.25	1,314.14	115
Other	241	5.29	6,662,684	4.92	108	810.31	741.28	109
Credit								
Auto Loan(s)	1,515	33.22	43,025,162	31.74	105	19,162.35	18,021.57	106
Auto Loan Applied On Own	676	14.82	19,105,237	14.09	105	16,003.27	15,282.58	105
Auto Loan Handled By Dealer	879	19.28	24,495,695	18.07	107	20,299.45	19,322.06	105
Mortgage	1,854	40.66	46,126,305	34.03	119	174,555.15	210,690.95	83
Second Mortgage	114	2.50	3,100,850	2.29	109	213,348.52	253,944.46	84
Fixed Rate Mortgage	1,512	33.16	36,620,779	27.02	123	201,116.57	262,545.50	77
Adjustable Rate Mortgage	169	3.71	4,024,631	2.97	125	214,594.49	213,849.35	100
Student Loan(s)	787	17.26	24,102,171	17.78	97	34,992.90	31,711.69	110
Any Line of Credit	739	16.21	22,943,457	16.93	96	15,450.48	12,776.18	121
Home Equity Line of Credit (HELOC)	430	9.43	10,239,040	7.55	125	29,484.76	30,733.42	96
Non-HELOC Line of Credit	295	6.47	12,348,744	9.11	71	4,990.37	4,169.52	120
Home Equity Loan(s)	359	7.87	8,502,324	6.27	126	161,038.74	178,165.98	90
Any Credit (Loan Mortgage Line of Credit Credit Card) Account	4,320	94.74	125,587,651	92.65	102	117,245.84	115,965.84	101

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Trade Area: 8044 Montgomery Rd - 1 mi.



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	62,354	100.00	342,965,686	100.00	100	--	--	--
Households	26,098	100.00	131,761,051	100.00	100	--	--	--
Average Household Income	--	154,453.48	--	124,101.00	124	--	--	--
Deposits								
Deposit (Checking Savings Money Market CD) Account	24,875	95.31	124,143,249	94.22	101	88,058.81	85,353.58	103
Checking Account(s)	24,029	92.07	119,387,564	90.61	102	14,435.81	14,602.47	99
Direct Deposit	19,411	74.38	93,601,319	71.04	105	--	--	--
Any Savings (Incl Money Market)	21,015	80.52	102,505,024	77.80	104	60,353.70	60,377.67	100
Traditional Savings Account(s)	19,980	76.56	97,816,571	74.24	103	37,237.09	38,015.07	98
Any Other Type of Savings or Money Market Account(s)	6,277	24.05	29,477,054	22.37	108	85,005.16	86,705.48	98
Non-Traditional Savings Account Type: Money Market	4,499	17.24	20,892,026	15.86	109	77,588.36	79,579.63	97
Certificate(s) of Deposit (CDs)	6,127	23.48	28,792,272	21.85	107	91,761.58	96,141.40	95
ATM/Debit Card								
Pre-Paid Debit Card(s)	5,395	20.67	31,438,053	23.86	87	--	--	--
ATM or Debit Card	22,138	84.83	115,166,767	87.41	97	--	--	--

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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	13,701	52.50	62,529,570	47.46	111	431,813.30	426,821.36	101
Any Keoughs/HR10s or IRAs	9,981	38.24	44,167,539	33.52	114	370,040.15	379,922.63	97
Brokerage Account(s)	9,416	36.08	45,458,493	34.50	105	--	--	--
Corporate or Municipal Bonds	1,848	7.08	9,650,792	7.33	97	--	--	--
Times bought/sold thru broker in last 90 days - 1-4 times all accounts	3,432	13.15	17,840,161	13.54	97	--	--	--
Times bought/sold thru broker in last 90 days - 5-9 times all accounts	831	3.18	4,509,934	3.42	93	--	--	--
Mutual Funds and ETFs	6,712	25.72	30,349,678	23.03	112	454,782.84	478,023.95	95
Mutual Fund Invested in Stocks	2,165	8.30	10,435,727	7.92	105	377,282.94	360,161.59	105
Mutual Fund Invested in Bonds/Interest-Earning Assets	1,111	4.26	5,541,208	4.21	101	231,703.74	247,843.76	93
Mutual Fund Split Investments (Stocks/Bonds/Interest-Earning Assets)	2,957	11.33	12,882,572	9.78	116	507,424.09	543,093.07	93
Real Estate	4,336	16.61	22,761,779	17.27	96	--	--	--
Publicly-Traded Stocks	7,642	29.28	38,167,790	28.97	101	--	--	--
Publicly-Traded Stock of Current or Former Employer	2,401	9.20	12,687,101	9.63	96	--	--	--
Publicly-Traded Stocks of Other Company	4,825	18.49	23,664,995	17.96	103	--	--	--
Tax-Deferred Savings Plan (Coverdell/529/Education Plan)	2,531	9.70	11,060,218	8.39	116	52,980.31	58,118.77	91
Government Savings Bonds	3,720	14.25	17,925,304	13.60	105	--	--	--
Government Bonds or Treasury Bills	2,363	9.05	12,324,275	9.35	97	--	--	--
Any Pension Retirement (Incl 401(k)) or Tax-Deferred Savings Plan	14,961	57.33	67,724,436	51.40	112	305,439.84	313,912.59	97
Non-Traditional Savings Account Type: Coverdell/Education IRA	638	2.44	3,543,755	2.69	91	70,721.47	68,230.58	104
Non-Traditional Savings Account Type: 529/State Sponsored Education Account	2,012	7.71	8,139,566	6.18	125	45,711.74	48,664.14	94
Retirement Investment								
401(k)	8,970	34.37	40,658,749	30.86	111	258,731.11	241,900.56	107
401(k) Invested in Stocks	1,838	7.04	8,577,895	6.51	108	277,364.46	234,084.07	118
401(k) Invested in Bonds/Interest-Earning Assets	1,293	4.95	6,342,962	4.81	103	134,894.48	139,996.50	96
401(k) Split Investments (Stocks/Bonds/Interest-Earning Assets)	3,960	15.17	17,245,653	13.09	116	315,889.39	322,761.92	98
Roth 401(k)	1,572	6.02	6,966,761	5.29	114	171,535.97	159,683.73	107
403(b)	1,318	5.05	5,567,877	4.23	120	226,272.19	268,957.63	84
Regular or other IRA	6,381	24.45	28,642,598	21.74	112	405,552.09	429,522.39	94
Regular IRA Invested in Stocks	1,310	5.02	6,457,011	4.90	102	--	--	--
Regular IRA Other Investments	1,334	5.11	5,743,025	4.36	117	--	--	--
Roth IRA	4,810	18.43	19,801,449	15.03	123	201,407.47	194,381.20	104
Roth IRA Invested in Stocks	1,124	4.31	5,272,832	4.00	108	--	--	--
Roth IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	2,334	8.94	8,964,924	6.80	131	--	--	--
Roth IRA Other Investments	919	3.52	3,479,112	2.64	133	--	--	--
Rollover IRA	3,395	13.01	15,016,186	11.40	114	356,112.23	379,670.60	94
Rollover IRA Invested in Stocks	722	2.77	3,446,539	2.62	106	--	--	--
Rollover IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	1,738	6.66	7,345,748	5.58	119	--	--	--
Rollover IRA Other Investments	578	2.21	2,374,932	1.80	123	--	--	--
Traditional Pension Plan	5,678	21.76	24,326,773	18.46	118	301,218.14	352,726.38	85

Benchmark: USA

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Index Colors:	<80	80 -110	110+
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Financial CLOUT® 2026 | 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	62,354	100.00	342,965,686	100.00	100	--	--	--
Households	26,098	100.00	131,761,051	100.00	100	--	--	--
Average Household Income	--	154,453.48	--	124,101.00	124	--	--	--
Credit Card								
Visa	16,766	64.24	87,230,987	66.20	97	1,670.86	1,798.02	93
MasterCard	11,559	44.29	57,465,835	43.61	102	1,542.24	1,573.80	98
Discover	4,326	16.58	17,616,773	13.37	124	1,147.21	1,169.27	98
American Express Blue/Credit Card	3,208	12.29	16,999,812	12.90	95	1,421.65	1,330.42	107
Other	1,305	5.00	6,308,372	4.79	104	796.49	760.51	105
Credit								
Auto Loan(s)	8,412	32.23	41,820,952	31.74	102	17,821.96	17,611.07	101
Auto Loan Applied On Own	3,727	14.28	18,719,198	14.21	101	14,786.39	14,881.71	99
Auto Loan Handled By Dealer	4,859	18.62	23,625,156	17.93	104	19,080.70	18,963.45	101
Mortgage	9,625	36.88	44,909,748	34.08	108	162,932.04	204,336.01	80
Second Mortgage	570	2.18	3,045,615	2.31	94	200,877.60	246,557.02	81
Fixed Rate Mortgage	7,769	29.77	35,612,462	27.03	110	190,102.14	255,822.27	74
Adjustable Rate Mortgage	860	3.29	3,971,715	3.01	109	183,960.92	206,319.48	89
Student Loan(s)	4,850	18.58	24,057,106	18.26	102	33,681.49	30,980.75	109
Any Line of Credit (HELOC)	4,131	15.83	22,176,987	16.83	94	13,753.57	12,454.54	110
Home Equity Line of Credit (HELOC)	2,154	8.25	9,822,455	7.46	111	28,049.97	30,100.75	93
Non-HELOC Line of Credit	1,923	7.37	12,051,545	9.15	81	4,387.69	4,022.77	109
Home Equity Loan(s)	1,800	6.90	8,228,555	6.25	110	152,100.19	175,175.22	87
Any Credit (Loan Mortgage Line of Credit Credit Card) Account	24,249	92.92	121,296,972	92.06	101	103,002.94	113,800.37	91

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	62,833	100.00	351,802,157	100.00	100	--	--	--
Households	26,308	100.00	135,556,487	100.00	100	--	--	--
Average Household Income	--	172,423.14	--	138,445.00	125	--	--	--
Deposits								
Deposit (Checking Savings Money Market CD) Account	25,161	95.64	128,237,519	94.60	101	94,694.65	92,395.54	102
Checking Account(s)	24,318	92.44	123,430,000	91.05	102	15,335.42	15,614.86	98
Direct Deposit	19,764	75.13	97,574,250	71.98	104	--	--	--
Any Savings (Incl Money Market)	21,397	81.33	106,683,754	78.70	103	64,587.27	64,879.36	100
Traditional Savings Account(s)	20,326	77.26	101,627,153	74.97	103	39,718.18	40,711.35	98
Any Other Type of Savings or Money Market Account(s)	6,594	25.07	31,733,604	23.41	107	89,184.24	90,911.06	98
Non-Traditional Savings Account Type: Money Market Account	4,750	18.05	22,557,650	16.64	109	81,072.30	83,283.43	97
Certificate(s) of Deposit (CDs)	6,436	24.46	30,912,466	22.80	107	96,235.72	101,034.08	95
ATM/Debit Card								
Pre-Paid Debit Card(s)	5,226	19.86	30,993,139	22.86	87	--	--	--
ATM or Debit Card	22,281	84.69	118,317,233	87.28	97	--	--	--

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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	14,189	53.93	66,237,701	48.86	110	461,324.76	455,677.07	101
Any Keoughs/HR10s or IRAs	10,484	39.85	47,588,376	35.11	114	395,779.70	406,033.34	97
Brokerage Account(s)	9,956	37.84	49,139,341	36.25	104	--	--	--
Corporate or Municipal Bonds	1,929	7.33	10,301,164	7.60	96	--	--	--
Times bought/sold thru broker in last 90 days - 1-4 times all accounts	3,587	13.63	19,046,227	14.05	97	--	--	--
Times bought/sold thru broker in last 90 days - 5-9 times all accounts	877	3.33	4,871,124	3.59	93	--	--	--
Mutual Funds and ETFs	7,123	27.07	32,954,839	24.31	111	482,550.40	507,479.04	95
Mutual Fund Invested in Stocks	2,294	8.72	11,321,031	8.35	104	400,826.27	381,975.58	105
Mutual Fund Invested in Bonds/Interest-Earning Assets	1,173	4.46	5,969,180	4.40	101	239,146.18	257,996.43	93
Mutual Fund Split Investments (Stocks/Bonds/Interest-Earning Assets)	3,159	12.01	14,080,097	10.39	116	536,172.32	573,426.22	94
Real Estate	4,528	17.21	24,309,112	17.93	96	--	--	--
Publicly-Traded Stocks	8,028	30.52	40,985,797	30.23	101	--	--	--
Publicly-Traded Stock of Current or Former Employer	2,481	9.43	13,439,163	9.91	95	--	--	--
Publicly-Traded Stocks of Other Company	5,124	19.48	25,667,942	18.93	103	--	--	--
Tax-Deferred Savings Plan (Coverdell/529/Education Plan)	2,652	10.08	11,843,909	8.74	115	54,987.52	60,257.28	91
Government Savings Bonds	3,827	14.55	18,826,139	13.89	105	--	--	--
Government Bonds or Treasury Bills	2,429	9.23	12,938,806	9.54	97	--	--	--
Any Pension Retirement (Incl 401(k)) or Tax-Deferred Savings Plan	15,476	58.83	71,722,700	52.91	111	327,458.69	336,055.67	97
Non-Traditional Savings Account: Coverdell/Education IRA	653	2.48	3,692,138	2.72	91	73,056.53	71,035.78	103
Non-Traditional Savings Account: 529/State Sponsored Education Account	2,131	8.10	8,803,323	6.49	125	47,786.01	50,666.35	94
Retirement Investment								
401(k)	9,152	34.79	42,358,054	31.25	111	273,158.86	254,713.06	107
401(k) Invested in Stocks	1,874	7.12	8,931,352	6.59	108	290,828.71	244,123.70	119
401(k) Invested in Bonds/Interest-Earning Assets	1,298	4.93	6,505,096	4.80	103	142,606.82	148,282.83	96
401(k) Split Investments (Stocks/Bonds/Interest-Earning Assets)	4,102	15.59	18,224,673	13.44	116	329,140.16	335,516.66	98
Roth 401(k)	1,579	6.00	7,190,064	5.30	113	180,182.67	167,239.36	108
403(b)	1,378	5.24	5,938,560	4.38	120	241,079.89	286,054.57	84
Regular or other IRA	6,773	25.75	31,194,729	23.01	112	431,905.05	456,922.10	95
Regular IRA Invested in Stocks	1,385	5.26	6,987,090	5.15	102	--	--	--
Regular IRA Other Investments	1,408	5.35	6,221,003	4.59	117	--	--	--
Roth IRA	5,033	19.13	21,183,891	15.63	122	212,266.64	204,654.76	104
Roth IRA Invested in Stocks	1,183	4.50	5,636,185	4.16	108	--	--	--
Roth IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	2,455	9.33	9,648,973	7.12	131	--	--	--
Roth IRA Other Investments	958	3.64	3,687,620	2.72	134	--	--	--
Rollover IRA	3,562	13.54	16,162,759	11.92	114	377,787.99	402,781.31	94
Rollover IRA Invested in Stocks	755	2.87	3,669,583	2.71	106	--	--	--
Rollover IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	1,847	7.02	8,052,035	5.94	118	--	--	--
Rollover IRA Other Investments	603	2.29	2,539,557	1.87	122	--	--	--
Traditional Pension Plan	6,022	22.89	26,494,024	19.55	117	324,840.12	380,371.65	85

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Index Colors:	<80	80 - 110	110+
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Financial CLOUT[®] 2031 | Debt Products & Services



Trade Area: 8044 Montgomery Rd - 3 mi.

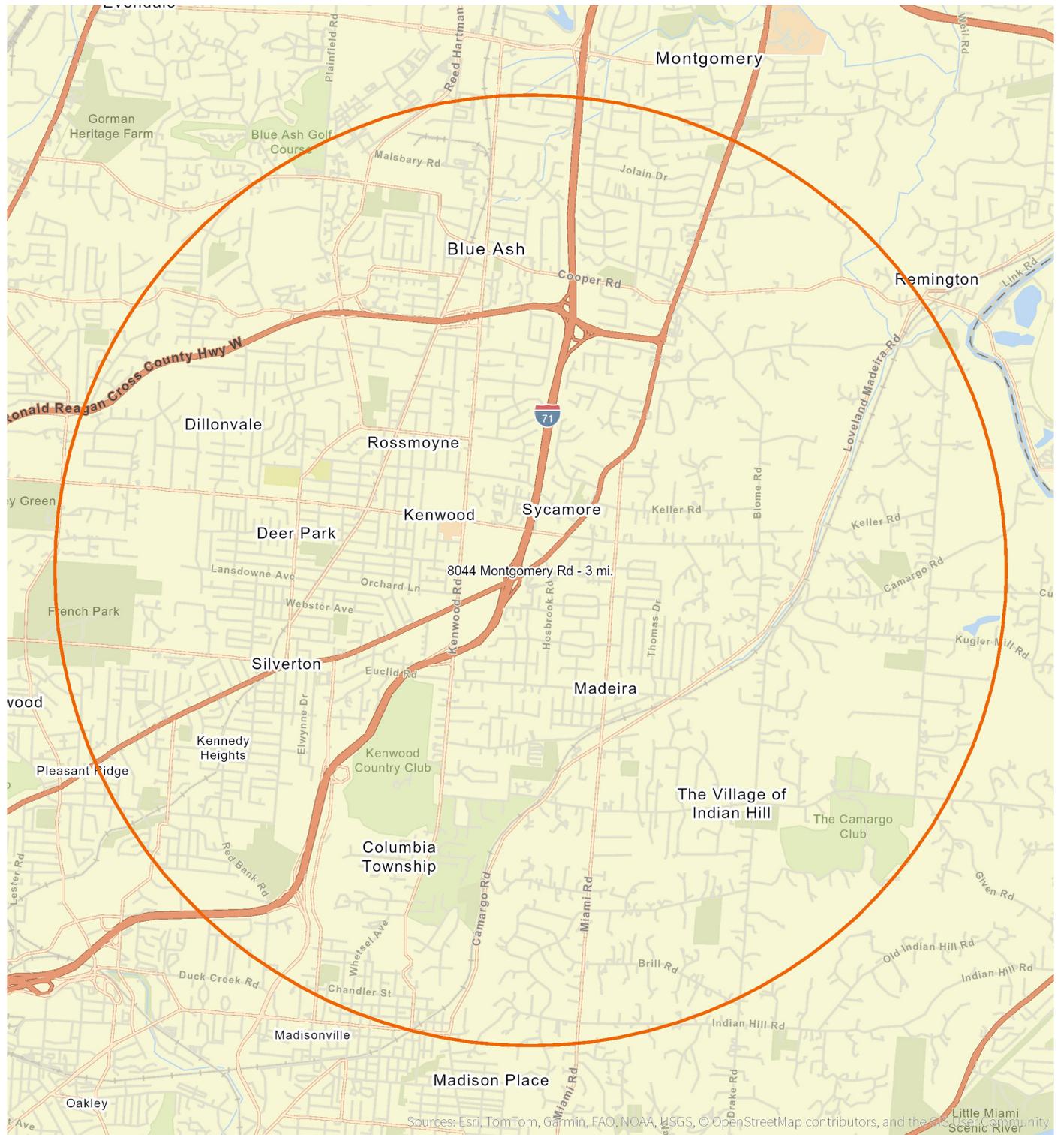
	Product Count of Area	% of Area HHs	Product Count of Base	% of Base HHs	Index: %	Average \$ Balance per HH of Area	Average \$ Balance per HH of Base	Index: Average \$
Basics								
Population	62,833	100.00	351,802,157	100.00	100	--	--	--
Households	26,308	100.00	135,556,487	100.00	100	--	--	--
Average Household Income	--	172,423.14	--	138,445.00	125	--	--	--
Credit Card								
Visa	17,186	65.33	91,237,242	67.31	97	1,661.29	1,798.68	92
MasterCard	11,852	45.05	60,179,688	44.40	101	1,524.41	1,567.83	97
Discover	4,462	16.96	18,579,297	13.71	124	1,115.14	1,139.07	98
American Express Blue/Credit Card	3,403	12.94	18,478,955	13.63	95	1,392.84	1,314.14	106
Other	1,341	5.10	6,662,684	4.92	104	775.55	741.28	105
Credit								
Auto Loan(s)	8,469	32.19	43,025,162	31.74	101	18,198.66	18,021.57	101
Auto Loan Applied On Own	3,732	14.19	19,105,237	14.09	101	15,144.38	15,282.58	99
Auto Loan Handled By Dealer	4,927	18.73	24,495,695	18.07	104	19,381.04	19,322.06	100
Mortgage	9,691	36.84	46,126,305	34.03	108	167,704.98	210,690.95	80
Second Mortgage	565	2.15	3,100,850	2.29	94	208,110.50	253,944.46	82
Fixed Rate Mortgage	7,835	29.78	36,620,779	27.02	110	195,094.51	262,545.50	74
Adjustable Rate Mortgage	848	3.22	4,024,631	2.97	109	194,288.73	213,849.35	91
Student Loan(s)	4,770	18.13	24,102,171	17.78	102	34,263.44	31,711.69	108
Any Line of Credit	4,197	15.95	22,943,457	16.93	94	14,003.42	12,776.18	110
Home Equity Line of Credit (HELOC)	2,189	8.32	10,239,040	7.55	110	28,720.27	30,733.42	93
Non-HELOC Line of Credit	1,936	7.36	12,348,744	9.11	81	4,484.19	4,169.52	108
Home Equity Loan(s)	1,814	6.89	8,502,324	6.27	110	154,182.31	178,165.98	87
Any Credit (Loan Mortgage Line of Credit Credit Card) Account	24,605	93.53	125,587,651	92.65	101	104,285.30	115,965.84	90

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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	161,624	100.00	342,965,686	100.00	100	--	--	--
Households	71,078	100.00	131,761,051	100.00	100	--	--	--
Average Household Income	--	139,216.36	--	124,101.00	112	--	--	--
Deposits								
Deposit (Checking Savings Money Market CD) Account	67,329	94.73	124,143,249	94.22	101	78,036.78	85,353.58	91
Checking Account(s)	64,950	91.38	119,387,564	90.61	101	12,945.02	14,602.47	89
Direct Deposit	51,789	72.86	93,601,319	71.04	103	--	--	--
Any Savings (Incl Money Market)	56,057	78.87	102,505,024	77.80	101	53,831.82	60,377.67	89
Traditional Savings Account(s)	53,374	75.09	97,816,571	74.24	101	33,320.15	38,015.07	88
Any Other Type of Savings or Money Market Account(s)	15,780	22.20	29,477,054	22.37	99	78,474.49	86,705.48	91
Non-Traditional Savings Account Type: Money Market	11,230	15.80	20,892,026	15.86	100	71,896.46	79,579.63	90
Certificate(s) of Deposit (CDs)	15,356	21.60	28,792,272	21.85	99	85,449.48	96,141.40	89
ATM/Debit Card								
Pre-Paid Debit Card(s)	15,818	22.25	31,438,053	23.86	93	--	--	--
ATM or Debit Card	60,490	85.10	115,166,767	87.41	97	--	--	--

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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	35,457	49.88	62,529,570	47.46	105	384,438.38	426,821.36	90
Any Keoughs/HR10s or IRAs	25,076	35.28	44,167,539	33.52	105	336,442.28	379,922.63	89
Brokerage Account(s)	23,701	33.34	45,458,493	34.50	97	--	--	--
Corporate or Municipal Bonds	4,758	6.69	9,650,792	7.33	91	--	--	--
Times bought/sold thru broker in last 90 days - 1-4 times all accounts	8,806	12.39	17,840,161	13.54	92	--	--	--
Times bought/sold thru broker in last 90 days - 5-9 times all accounts	2,091	2.94	4,509,934	3.42	86	--	--	--
Mutual Funds and ETFs	16,724	23.53	30,349,678	23.03	102	415,518.25	478,023.95	87
Mutual Fund Invested in Stocks	5,393	7.59	10,435,727	7.92	96	345,703.64	360,161.59	96
Mutual Fund Invested in Bonds/Interest-Earning Assets	2,821	3.97	5,541,208	4.21	94	211,473.83	247,843.76	85
Mutual Fund Split Investments (Stocks/Bonds/Interest-Earning Assets)	7,279	10.24	12,882,572	9.78	105	468,033.38	543,093.07	86
Real Estate	10,971	15.44	22,761,779	17.27	89	--	--	--
Publicly-Traded Stocks	19,538	27.49	38,167,790	28.97	95	--	--	--
Publicly-Traded Stock of Current or Former Employer	6,147	8.65	12,687,101	9.63	90	--	--	--
Publicly-Traded Stocks of Other Company	12,219	17.19	23,664,995	17.96	96	--	--	--
Tax-Deferred Savings Plan (Coverdell/529/Education Plan)	6,158	8.66	11,060,218	8.39	103	48,357.90	58,118.77	83
Government Savings Bonds	9,656	13.59	17,925,304	13.60	100	--	--	--
Government Bonds or Treasury Bills	6,158	8.66	12,324,275	9.35	93	--	--	--
Any Pension Retirement (Incl 401(k)) or Tax-Deferred Savings Plan	38,652	54.38	67,724,436	51.40	106	272,327.25	313,912.59	87
Non-Traditional Savings Account Type: Coverdell/Education IRA	1,648	2.32	3,543,755	2.69	86	63,299.89	68,230.58	93
Non-Traditional Savings Account Type: 529/State Sponsored Education Account	4,787	6.74	8,139,566	6.18	109	42,104.38	48,664.14	87
Retirement Investment								
401(k)	23,593	33.19	40,658,749	30.86	108	228,424.64	241,900.56	94
401(k) Invested in Stocks	4,747	6.68	8,577,895	6.51	103	246,848.52	234,084.07	105
401(k) Invested in Bonds/Interest-Earning Assets	3,494	4.92	6,342,962	4.81	102	119,290.39	139,996.50	85
401(k) Split Investments (Stocks/Bonds/Interest-Earning Assets)	10,083	14.19	17,245,653	13.09	108	282,356.76	322,761.92	87
Roth 401(k)	4,190	5.89	6,966,761	5.29	111	152,573.66	159,683.73	96
403(b)	3,342	4.70	5,567,877	4.23	111	204,284.58	268,957.63	76
Regular or other IRA	15,791	22.22	28,642,598	21.74	102	372,233.29	429,522.39	87
Regular IRA Invested in Stocks	3,282	4.62	6,457,011	4.90	94	--	--	--
Regular IRA Other Investments	3,299	4.64	5,743,025	4.36	106	--	--	--
Roth IRA	12,189	17.15	19,801,449	15.03	114	182,867.89	194,381.20	94
Roth IRA Invested in Stocks	2,855	4.02	5,272,832	4.00	100	--	--	--
Roth IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	5,823	8.19	8,964,924	6.80	120	--	--	--
Roth IRA Other Investments	2,360	3.32	3,479,112	2.64	126	--	--	--
Rollover IRA	8,493	11.95	15,016,186	11.40	105	324,742.16	379,670.60	86
Rollover IRA Invested in Stocks	1,823	2.56	3,446,539	2.62	98	--	--	--
Rollover IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	4,254	5.99	7,345,748	5.58	107	--	--	--
Rollover IRA Other Investments	1,450	2.04	2,374,932	1.80	113	--	--	--
Traditional Pension Plan	14,118	19.86	24,326,773	18.46	108	275,259.26	352,726.38	78

Benchmark: USA

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Index Colors:	<80	80 -110	110+
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Financial CLOUT® 2026 | 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	161,624	100.00	342,965,686	100.00	100	--	--	--
Households	71,078	100.00	131,761,051	100.00	100	--	--	--
Average Household Income	--	139,216.36	--	124,101.00	112	--	--	--
Credit Card								
Visa	44,271	62.28	87,230,987	66.20	94	1,608.21	1,798.02	89
MasterCard	30,498	42.91	57,465,835	43.61	98	1,471.94	1,573.80	94
Discover	11,199	15.76	17,616,773	13.37	118	1,174.96	1,169.27	100
American Express Blue/Credit Card	8,065	11.35	16,999,812	12.90	88	1,341.86	1,330.42	101
Other	3,450	4.85	6,308,372	4.79	101	786.98	760.51	103
Credit								
Auto Loan(s)	22,698	31.93	41,820,952	31.74	101	16,901.91	17,611.07	96
Auto Loan Applied On Own	9,981	14.04	18,719,198	14.21	99	13,793.89	14,881.71	93
Auto Loan Handled By Dealer	13,102	18.43	23,625,156	17.93	103	18,318.60	18,963.45	97
Mortgage	23,397	32.92	44,909,748	34.08	97	155,918.29	204,336.01	76
Second Mortgage	1,352	1.90	3,045,615	2.31	82	192,626.54	246,557.02	78
Fixed Rate Mortgage	18,561	26.11	35,612,462	27.03	97	183,913.42	255,822.27	72
Adjustable Rate Mortgage	2,073	2.92	3,971,715	3.01	97	173,272.46	206,319.48	84
Student Loan(s)	14,225	20.01	24,057,106	18.26	110	32,458.92	30,980.75	105
Any Line of Credit (HELOC)	11,464	16.13	22,176,987	16.83	96	12,121.10	12,454.54	97
Home Equity Line of Credit (HELOC)	5,100	7.17	9,822,455	7.46	96	26,917.52	30,100.75	89
Non-HELOC Line of Credit	6,202	8.73	12,051,545	9.15	95	3,987.16	4,022.77	99
Home Equity Loan(s)	4,273	6.01	8,228,555	6.25	96	146,606.16	175,175.22	84
Any Credit (Loan Mortgage Line of Credit Credit Card) Account	65,160	91.67	121,296,972	92.06	100	91,478.36	113,800.37	80

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 \$
Basics								
Population	163,162	100.00	351,802,157	100.00	100	--	--	--
Households	71,884	100.00	135,556,487	100.00	100	--	--	--
Average Household Income	--	154,983.00	--	138,445.00	112	--	--	--
Deposits								
Deposit (Checking Savings Money Market CD) Account	68,348	95.08	128,237,519	94.60	101	84,211.73	92,395.54	91
Checking Account(s)	65,976	91.78	123,430,000	91.05	101	13,812.55	15,614.86	88
Direct Deposit	52,971	73.69	97,574,250	71.98	102	--	--	--
Any Savings (Incl Money Market)	57,305	79.72	106,683,754	78.70	101	57,829.72	64,879.36	89
Traditional Savings Account(s)	54,491	75.80	101,627,153	74.97	101	35,688.82	40,711.35	88
Any Other Type of Savings or Money Market Account(s)	16,675	23.20	31,733,604	23.41	99	82,504.75	90,911.06	91
Non-Traditional Savings Account Type: Money Market Account	11,909	16.57	22,557,650	16.64	100	75,414.30	83,283.43	91
Certificate(s) of Deposit (CDs)	16,194	22.53	30,912,466	22.80	99	89,648.77	101,034.08	89
ATM/Debit Card								
Pre-Paid Debit Card(s)	15,359	21.37	30,993,139	22.86	93	--	--	--
ATM or Debit Card	61,088	84.98	118,317,233	87.28	97	--	--	--

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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	36,918	51.36	66,237,701	48.86	105	411,923.68	455,677.07	90
Any Keoughs/HR10s or IRAs	26,481	36.84	47,588,376	35.11	105	359,612.24	406,033.34	89
Brokerage Account(s)	25,181	35.03	49,139,341	36.25	97	--	--	--
Corporate or Municipal Bonds	4,980	6.93	10,301,164	7.60	91	--	--	--
Times bought/sold thru broker in last 90 days - 1-4 times all accounts	9,225	12.83	19,046,227	14.05	91	--	--	--
Times bought/sold thru broker in last 90 days - 5-9 times all accounts	2,213	3.08	4,871,124	3.59	86	--	--	--
Mutual Funds and ETFs	17,818	24.79	32,954,839	24.31	102	441,518.68	507,479.04	87
Mutual Fund Invested in Stocks	5,737	7.98	11,321,031	8.35	96	368,381.96	381,975.58	96
Mutual Fund Invested in Bonds/Interest-Earning Assets	2,983	4.15	5,969,180	4.40	94	219,282.30	257,996.43	85
Mutual Fund Split Investments (Stocks/Bonds/Interest-Earning Assets)	7,816	10.87	14,080,097	10.39	105	494,466.39	573,426.22	86
Real Estate	11,498	15.99	24,309,112	17.93	89	--	--	--
Publicly-Traded Stocks	20,609	28.67	40,985,797	30.23	95	--	--	--
Publicly-Traded Stock of Current or Former Employer	6,381	8.88	13,439,163	9.91	90	--	--	--
Publicly-Traded Stocks of Other Company	13,028	18.12	25,667,942	18.93	96	--	--	--
Tax-Deferred Savings Plan (Coverdell/529/Education Plan)	6,490	9.03	11,843,909	8.74	103	50,403.59	60,257.28	84
Government Savings Bonds	9,942	13.83	18,826,139	13.89	100	--	--	--
Government Bonds or Treasury Bills	6,341	8.82	12,938,806	9.54	92	--	--	--
Any Pension Retirement (Incl 401(k)) or Tax-Deferred Savings Plan	40,213	55.94	71,722,700	52.91	106	292,615.82	336,055.67	87
Non-Traditional Savings Account: Coverdell/Education IRA	1,685	2.34	3,692,138	2.72	86	66,155.56	71,035.78	93
Non-Traditional Savings Account: 529/State Sponsored Education Account	5,102	7.10	8,803,323	6.49	109	44,161.53	50,666.35	87
Retirement Investment								
401(k)	24,223	33.70	42,358,054	31.25	108	242,578.91	254,713.06	95
401(k) Invested in Stocks	4,875	6.78	8,931,352	6.59	103	259,968.46	244,123.70	106
401(k) Invested in Bonds/Interest-Earning Assets	3,531	4.91	6,505,096	4.80	102	126,458.01	148,282.83	85
401(k) Split Investments (Stocks/Bonds/Interest-Earning Assets)	10,520	14.63	18,224,673	13.44	109	296,075.28	335,516.66	88
Roth 401(k)	4,244	5.90	7,190,064	5.30	111	160,941.69	167,239.36	96
403(b)	3,508	4.88	5,938,560	4.38	111	218,649.82	286,054.57	76
Regular or other IRA	16,841	23.43	31,194,729	23.01	102	396,020.96	456,922.10	87
Regular IRA Invested in Stocks	3,474	4.83	6,987,090	5.15	94	--	--	--
Regular IRA Other Investments	3,507	4.88	6,221,003	4.59	106	--	--	--
Roth IRA	12,810	17.82	21,183,891	15.63	114	193,269.16	204,654.76	94
Roth IRA Invested in Stocks	3,003	4.18	5,636,185	4.16	100	--	--	--
Roth IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	6,153	8.56	9,648,973	7.12	120	--	--	--
Roth IRA Other Investments	2,458	3.42	3,687,620	2.72	126	--	--	--
Rollover IRA	8,939	12.44	16,162,759	11.92	104	344,806.94	402,781.31	86
Rollover IRA Invested in Stocks	1,906	2.65	3,669,583	2.71	98	--	--	--
Rollover IRA Split Investments (Stocks/Bonds/Interest-Earning Assets)	4,546	6.32	8,052,035	5.94	106	--	--	--
Rollover IRA Other Investments	1,520	2.12	2,539,557	1.87	113	--	--	--
Traditional Pension Plan	15,049	20.93	26,494,024	19.55	107	296,219.97	380,371.65	78

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Index Colors:	<80	80 - 110	110+
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Financial CLOUT[®] 2031 | 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	163,162	100.00	351,802,157	100.00	100	--	--	--
Households	71,884	100.00	135,556,487	100.00	100	--	--	--
Average Household Income	--	154,983.00	--	138,445.00	112	--	--	--
Credit Card								
Visa	45,569	63.39	91,237,242	67.31	94	1,606.65	1,798.68	89
MasterCard	31,407	43.69	60,179,688	44.40	98	1,462.34	1,567.83	93
Discover	11,583	16.11	18,579,297	13.71	118	1,146.98	1,139.07	101
American Express Blue/Credit Card	8,605	11.97	18,478,955	13.63	88	1,323.91	1,314.14	101
Other	3,565	4.96	6,662,684	4.92	101	767.47	741.28	104
Credit								
Auto Loan(s)	22,934	31.90	43,025,162	31.74	101	17,320.74	18,021.57	96
Auto Loan Applied On Own	10,022	13.94	19,105,237	14.09	99	14,200.98	15,282.58	93
Auto Loan Handled By Dealer	13,343	18.56	24,495,695	18.07	103	18,655.17	19,322.06	97
Mortgage	23,600	32.83	46,126,305	34.03	96	160,997.98	210,690.95	76
Second Mortgage	1,341	1.87	3,100,850	2.29	82	199,721.39	253,944.46	79
Fixed Rate Mortgage	18,762	26.10	36,620,779	27.02	97	189,458.50	262,545.50	72
Adjustable Rate Mortgage	2,038	2.83	4,024,631	2.97	95	183,752.33	213,849.35	86
Student Loan(s)	14,020	19.50	24,102,171	17.78	110	33,158.01	31,711.69	105
Any Line of Credit	11,648	16.20	22,943,457	16.93	96	12,416.69	12,776.18	97
Home Equity Line of Credit (HELOC)	5,204	7.24	10,239,040	7.55	96	27,678.34	30,733.42	90
Non-HELOC Line of Credit	6,252	8.70	12,348,744	9.11	95	4,086.93	4,169.52	98
Home Equity Loan(s)	4,317	6.00	8,502,324	6.27	96	148,982.00	178,165.98	84
Any Credit (Loan Mortgage Line of Credit Credit Card) Account	66,352	92.30	125,587,651	92.65	100	92,987.93	115,965.84	80

Benchmark: USA

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Index Colors:	<80	80 -110	110+
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Report Details

Name: Financial CLOUT® 2026
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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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