

Classification into Retirement Segments

Questions

I dream about doing something different in life than I am doing right now

I am worried that I will not have enough money saved for all of my retirement years

When thinking about your retirement, how desirable is it that you relax and do nothing?

Do you have an overall investment strategy for your retirement years, that is, a set blueprint or plan that guides decisions on how to invest your money and the relative role of things like savings, equities, insurance and debt?

Which of the following steps have you taken to prepare financially for your retirement years? Have you. . .

Bought long-term care insurance

Contributed to a 401K plan or similar plan

Contributed to an IRA

Invested in mutual funds

Invested in individual stocks

Invested in bonds

Values

Strongly Agree-4
Somewhat Agree-3
Somewhat Disagree-2
Strongly Disagree-1

Strongly Agree-4
Somewhat Agree-3
Somewhat Disagree-2
Strongly Disagree-1

Absolutely Essential-5
Very Desirable-4
Somewhat Desirable-3
Just Slightly Desirable-2
Not At All Desirable-1

Yes - 1 No - 0

Yes - 1 No - 0

Yes - 1 No - 0

Yes - 1 No - 0

Yes - 1 No - 0

Yes - 1 No - 0

Yes - 1 No - 0

Clear Responses

Response

Invested in real estate

Yes - 1 No - 0



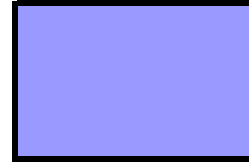
Purchased an annuity

Yes - 1 No - 0



How would you characterize your health in general? Would you say it is...

Excellent-5
Very Good-4
Good-3
Fair-2
Poor-1



Segment: Unclassified