

# Rising Stars: Investors

## Group F – Cluster 24

Number of Households: 1,436,578

% of U.S. Households: 1.2%



Affluence



Complexity



Urbanicity

### Cluster Description

With assets of over half a million dollars, households in this cluster seek diverse portfolio allocation including complex combinations of stocks, mutual funds and other investments. They likely invest with an advisor and are generally risk-tolerant. Owning a home just isn't enough; real estate investments may also be a focus. These families with kids are "Buyers of the Best", and they hold several insurance products to protect their valued homes, life, and belongings. From dining out and entertaining at home, to a variety of fitness-related activities, these households enjoy diverse hobbies. They are likely to be involved in public activities, such as fundraising or participating in a civic group.

### Demographic Summary

Affluence Tier: Mass Affluent

Median Age: 48

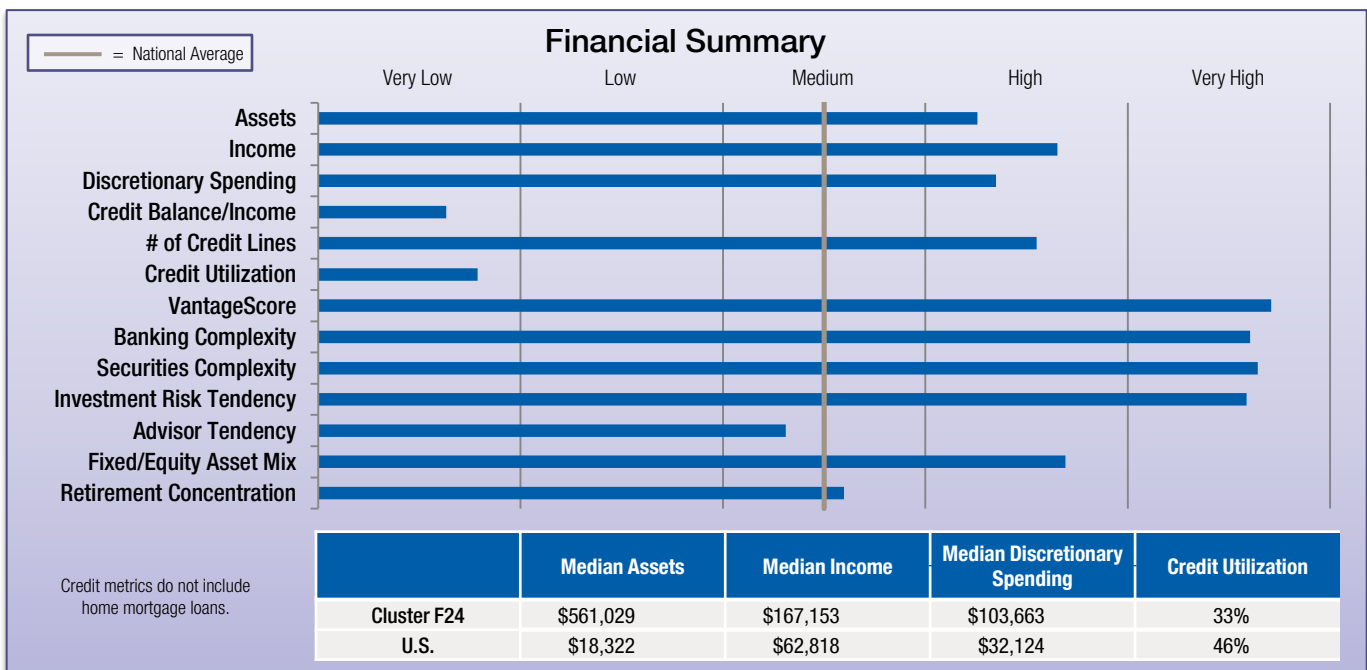
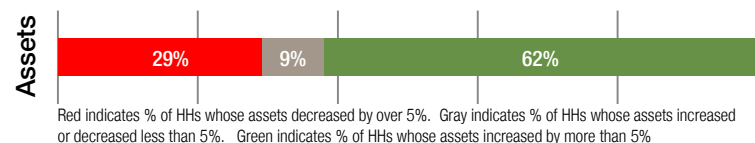
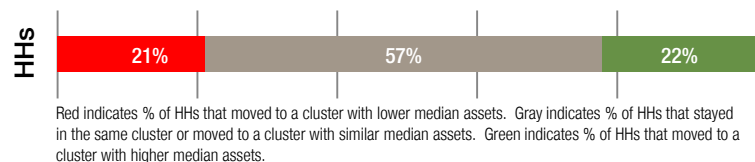
Age Tier: Working Years (35-54)

Urbanicity: Major Metropolitan

% Married: 86%

% with Children: 71%

### Migration Summary

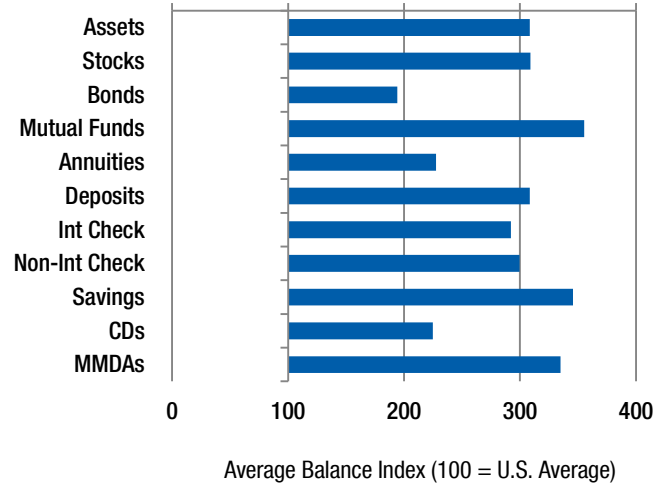


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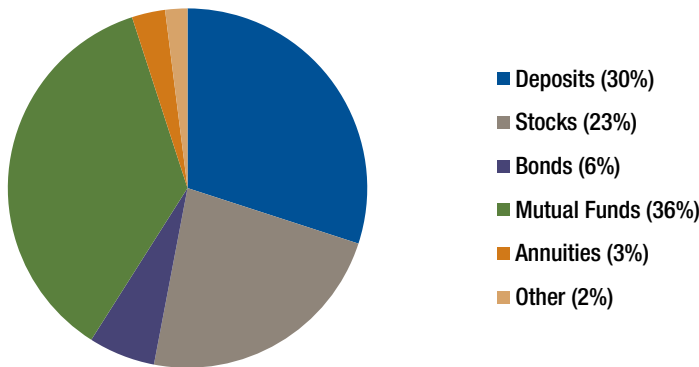
## Group F – Cluster 24

### Portfolio Profile vs. U.S. Averages

Product	Segment Avg Balance	U.S. Avg Balance
Assets	\$581,655	\$188,642
Stocks	\$131,515	\$42,569
Bonds	\$34,382	\$17,690
Mutual Funds	\$209,815	\$59,046
Annuities	\$18,912	\$8,314
Deposits	\$173,774	\$56,318
Int Check	\$21,554	\$7,375
Non-Int Check	\$18,099	\$6,040
Savings	\$32,801	\$9,492
CDs	\$27,838	\$12,382
MMDAs	\$55,389	\$16,541

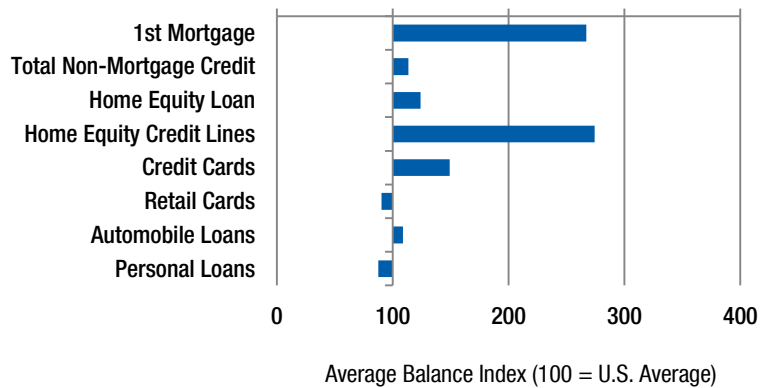


### Asset Allocation



### Credit Profile vs. U.S. Averages

Product	Segment Avg Balance	U.S. Avg Balance
1st Mortgage	\$192,469	\$72,061
Total Non-Mortgage Credit	\$24,652	\$21,711
Home Equity Loan	\$2,055	\$1,658
Home Equity Credit Lines	\$15,997	\$5,832
Credit Cards	\$8,718	\$5,849
Retail Cards	\$556	\$616
Automobile Loans	\$6,601	\$6,067
Personal Loans	\$659	\$753

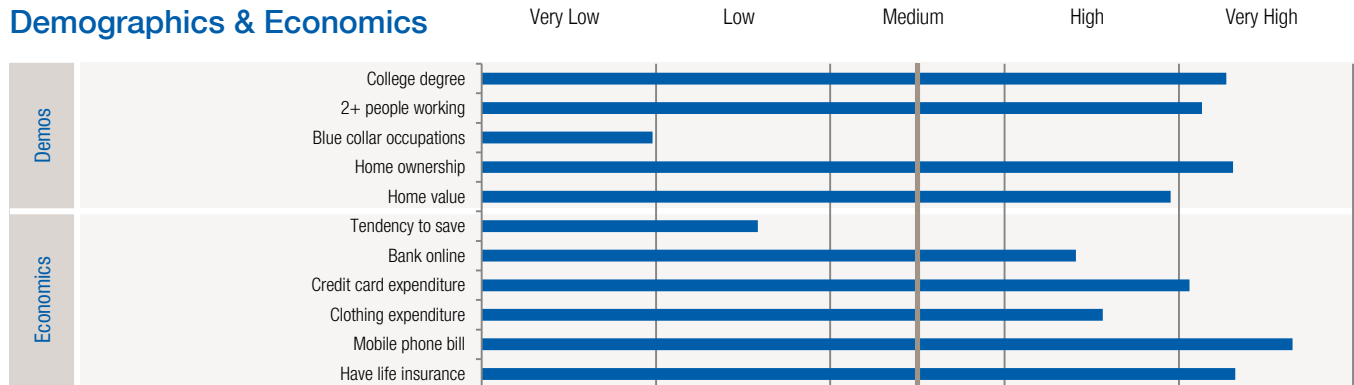


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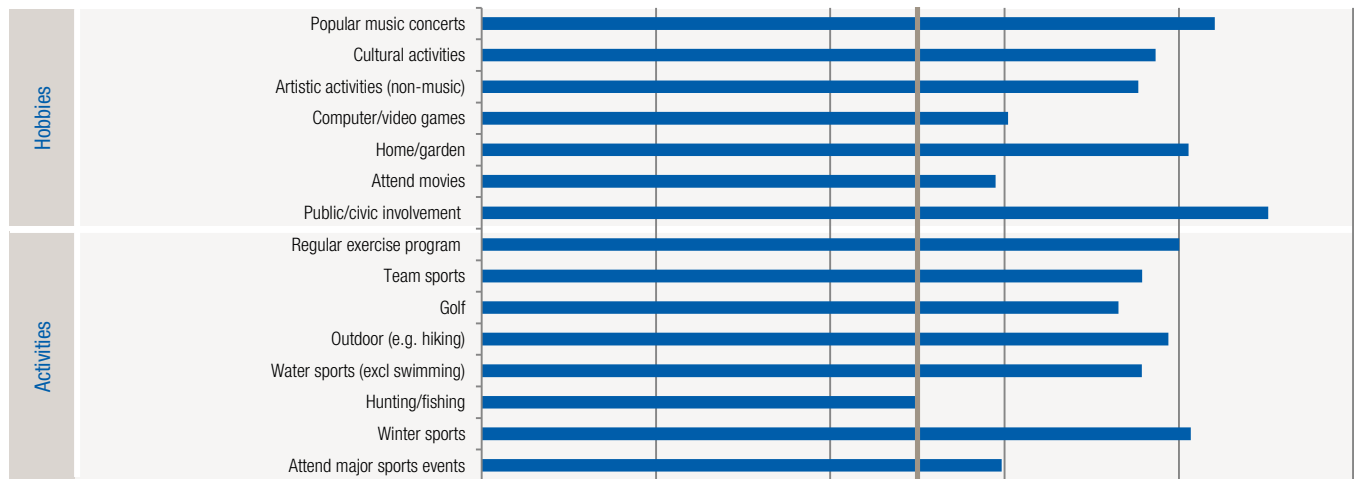
## Group F – Cluster 24

— = National Average

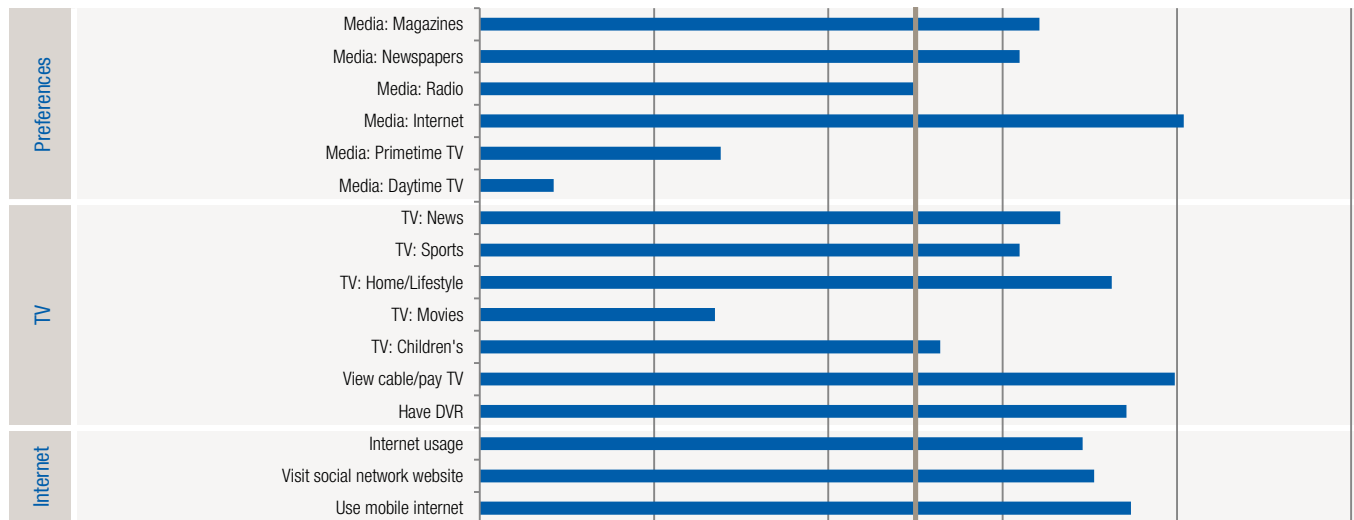
### Demographics & Economics



### Leisure and Interests



### Media



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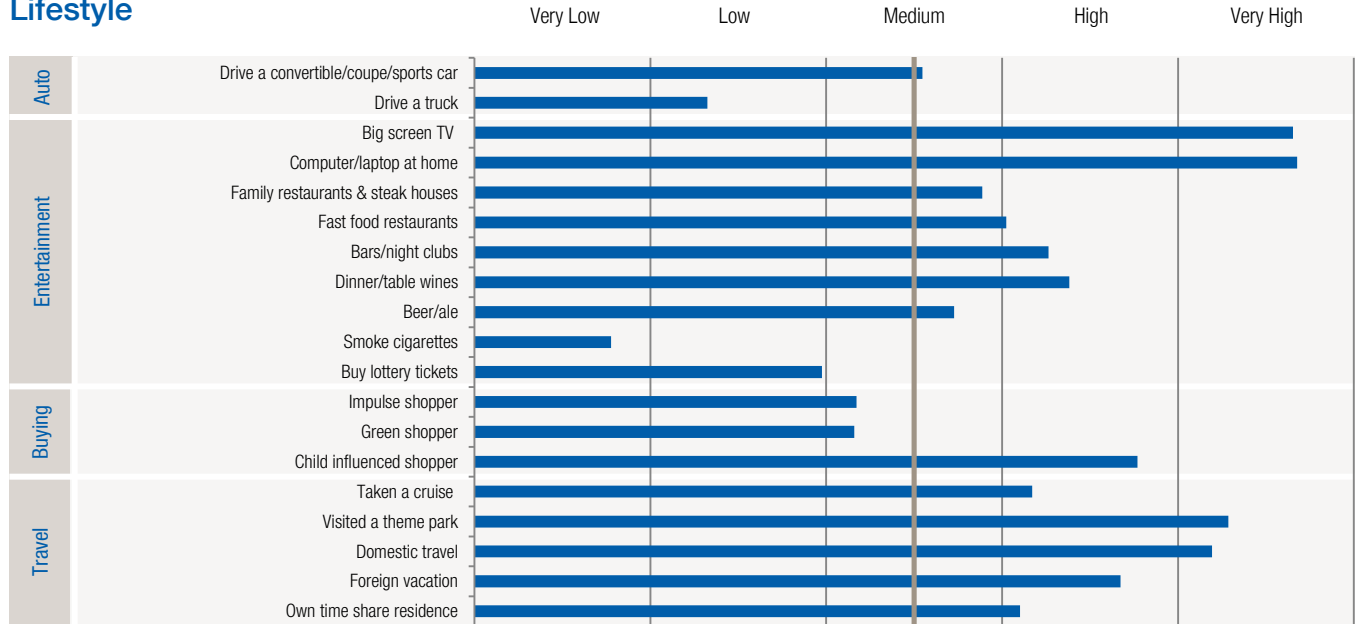
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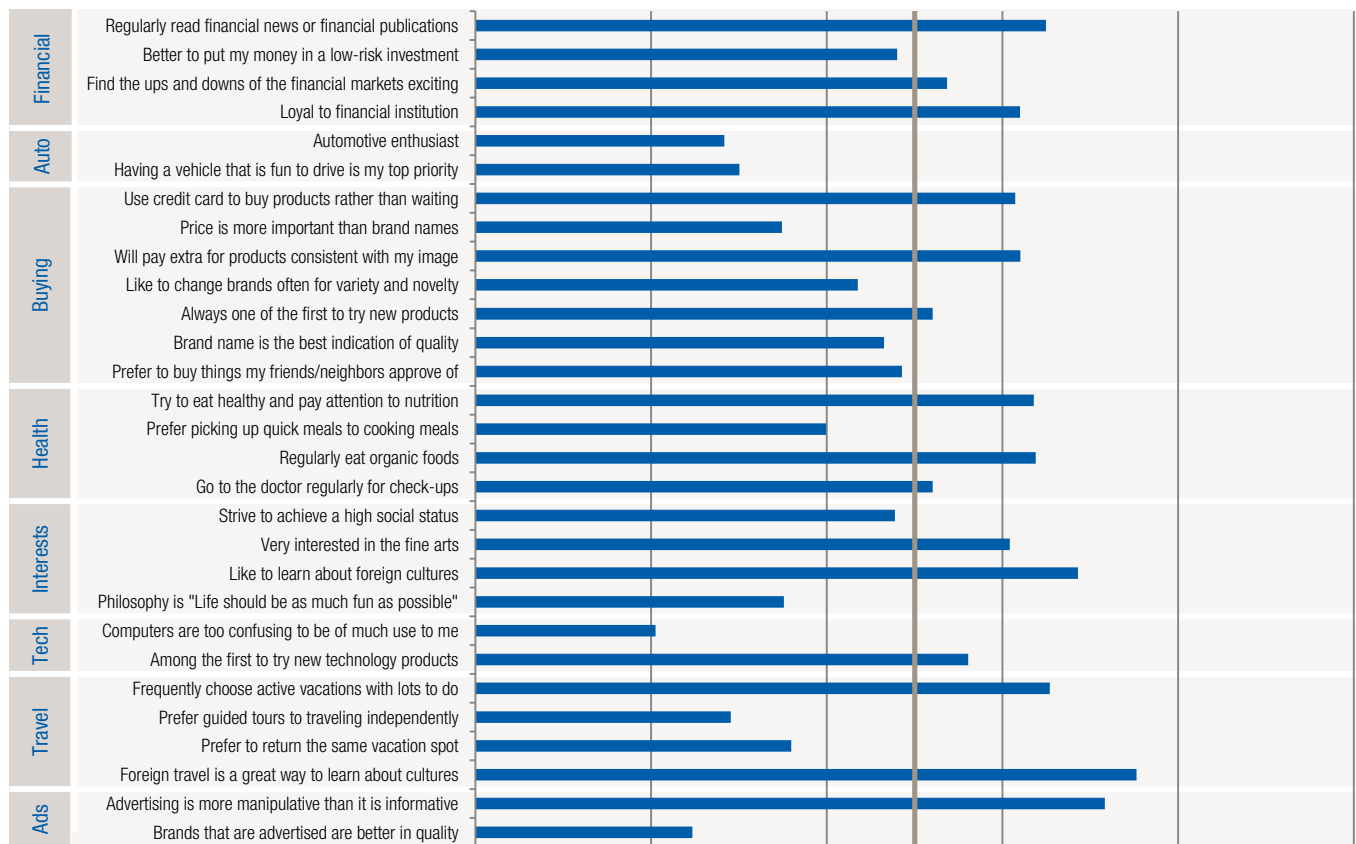
## Group F – Cluster 24

— = National Average

### Lifestyle



### Attitudes



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MASS AFFLUENT