Q7. Which of the following statements best describes your financial lifestyle and goals?

	Total
Base: All respondents	(n=1082)
I am trying to meet my basic financial needs and savings goals.	60%
I am actively building my savings and investments for financial security and to improve my lifestyle.	21%
I have achieved my financial goals. My primary concerns are preserving my wealth and enjoying the freedom it gives me to pursue my personal goals.	15%
Although I am still managing my wealth, my primary concern is to enhance my wealth and begin to transfer it to the people and causes that are important to me.	4%

Q9. Please indicate which of the following financial products, services, and investments you currently own/participate in.

	Total
Base: All respondents	(n=1082)
Savings	71%
Life Insurance	50%
Stocks	31%
Mutual funds	25%
Money Market Accounts	24%
CDs	23%
Annuities	16%

Q11_11. (Annuities) Please indicate how knowledgeable you are about each of the following financial products, services, and investments.

	Total
Base: All respondents	(n=1082)
Annuities	
Extremely knowledgeable	3%
Very knowledgeable	10%
Somewhat knowledgeable	26%
Not very knowledgeable	29%
Not at all knowledgeable	31%
Summary	
Top 2 Box	14%
Low 2 Box	61%

Q16. Which statement best describes how much you think you would like or dislike this 401(k) annuity?

		Age
	Total	25-34
		(C)
Base: All respondents	(n=1082)	(n=198)
(6) Like extremely well	7%	8%
(5) Like very well	18%	20%
(4) Like quite well	22%	30%
(3) Like somewhat	26%	25%
(2) Like slightly	12%	12%
(1) Not like at all	14%	5%
Summary		
Top 3 Box	47%	58%
Top 2 Box	25%	28%
Mid 2 Box	49%	55%
Low 3 Box	53%	42%
Low 2 Box	26%	17%
Mean	3.4	3.7
Std Dev	1.5	1.3
Std Err	0	0.1

Q28_11. [Is good for retirement] Thinking about this 401(k) annuity, how strongly do you agree or disagree with each of the following statements? A 401(k) annuity...

	Total
Base: All respondents	(n=1082)
Is good for retirement	
Summary	
Top 2 Box	60%

Q30_14. (After retirement I will not have enough money to live at the same standard I'm accustomed to) Please indicate how much you agree or disagree with each statement below.

	Total
Base: Not currently retired	(n=703)
After retirement I will not have enough money to live at the same standard I'm accustomed to	
(5) Agree Strongly	17%
(4) Agree Somewhat	31%
(3) Neither Agree nor Disagree	34%
(2) Disagree Somewhat	12%
(1) Disagree Strongly	6%
Summary	
Top Box	17%
Top 2 Box	48%
Mid Box	34%
Low 2 Box	18%
Mean	3.4
Std Dev	1.1
Std Err	0

Q30_20. (Social security will not provide enough income to live in retirement) Please indicate how much you agree or disagree with each statement below.

	Total
Base: All respondents	(n=1082)
Social security will not provide enough income to live in retirement	
(5) Agree Strongly	53%
(4) Agree Somewhat	24%
(3) Neither Agree nor Disagree	16%
(2) Disagree Somewhat	4%
(1) Disagree Strongly	3%
Summary	
Top Box	53%
Top 2 Box	78%
Mid Box	16%
Low 2 Box	7%
Mean	4.2
Std Dev	1
Std Err	0

Q30_22. (I need investments that provide me a fixed monthly payout during my retirement) Please indicate how much you agree or disagree with each statement below.

	Total
Base: All respondents	(n=1082)
I need investments that provide me a fixed monthly payout during my retirement	
(5) Agree Strongly	22%
(4) Agree Somewhat	37%
(3) Neither Agree nor Disagree	33%
(2) Disagree Somewhat	5%
(1) Disagree Strongly	3%
Summary	
Top Box	22%
Top 2 Box	58%
Mid Box	33%
Low 2 Box	9%
Mean	3.7
Std Dev	1
Std Err	0

Q30_24. (I expect to outlive my retirement savings) Please indicate
how much you agree or disagree with each statement below.

	Total
Base: All respondents	(n=1082)
I expect to outlive my retirement savings	
(5) Agree Strongly	15%
(4) Agree Somewhat	23%
(3) Neither Agree nor Disagree	38%
(2) Disagree Somewhat	12%
(1) Disagree Strongly	12%
Summary	
Top Box	15%
Top 2 Box	38%
Mid Box	38%
Low 2 Box	24%
Mean	3.2
Std Dev	1.2
Std Err	0

Q31. At what age didyou retire/do you plan to retire?

	Total
Base: All respondents	(n=1082)
Summary	
25-59	18%
60-69	55%
70+	27%
Mean	64.3
Std Dev	8.8
Std Err	0.3

Q32. How many years do you expect to be in retirement?

	Total
Base: All respondents	(n=1082)
(1) Less than 5 years	5%
(7.5) 5 to 10 years	11%
(12.5) 11 to 14 years	12%
(17) 15 to 19 years	19%
(22) 20 to 24 years	22%
(30) 25 or more years	30%
Summary	
Mean	19.6
Std Dev	8.7
Std Err	0.3

Q33. What are your monthly expenses during retirement?

	Total
Base: All retired respondents	(n=379)
(250) Less than $500	3%
(500) $500 to less than $1,000	14%
(2250) $1,000 to less than $2,500	40%
(3750) $2,500 to less than $5,000	25%
(6250) $5,000 to less than $7,500	6%
(8750) $7,500 to less than $10,000	2%
(15000) $10,000 or more	1%
Not sure	9%
Summary	
Less than 2,500	58%
2,500 to 7,500	30%
7,500+	3%
Mean	2857.6
Std Dev	2227
Std Err	120.1

Q34. How likely is it that you will continue to have enough retirement income to cover your monthly expenses throughout your retirement?

	Total
Base: All retired respondents	(n=379)
(5) Extremely likely	18%
(4) Very likely	28%
(3) Somewhat likely	35%
(2) Not very likely	14%
(1) Not at all likely	5%
Summary	
Top Box	18%
Top 2 Box	46%
Top 3 Box	81%
Low 2 Box	19%
Low 3 Box	54%
Mean	3.4
Std Dev	1.1
Std Err	0.1

Q35. How much money do you believe you will need to cover your
monthly expenses during retirement?

	Total
Base: All respondents not retired	(n=703)
(250) Less than $500	0
(500) $500 to less than $1,000	7%
(2250) $1,000 to less than $2,500	25%
(3750) $2,500 to less than $5,000	39%
(6250) $5,000 to less than $7,500	11%
(8750) $7,500 to less than $10,000	3%
(15000) $10,000 or more	3%
Not sure	11%
Summary	
Less than 2,500	32%
2,500 to 7,500	50%
7,500+	7%
Mean	3987.3
Std Dev	2819.3
Std Err	112.5

Q36. When you retire, how likely is it that you will actually have enough retirement income to cover your monthly expenses throughout your retirement?

	Total
Base: All respondents not retired	(n=703)
(5) Extremely likely	9%
(4) Very likely	18%
(3) Somewhat likely	35%
(2) Not very likely	28%
(1) Not at all likely	10%
Summary	
Top Box	9%
Top 2 Box	27%
Top 3 Box	62%
Low 2 Box	38%
Low 3 Box	73%
Mean	2.9
Std Dev	1.1
Std Err	0