

1_1. (Regular payments to reduce or eliminate debt) The statements below are a list of different financial priorities that you might currently have. Please select up to three that are the most important priorities to you right now. Put them in order of importance.

Proportions/Means: Columns Tested (5% risk level) - A/B/C - D/E/F Overlap formulae used.

	Total	AGE			INVESTMENT KNOWLEDGE		
		50-59	60-69	50-69	A/B	C	D/F
		A	B	C	D	E	F
Base: All respondents	1028	338	180	518	237	557	234
Weighted	1028	308	161	468	232	562	233
1ST MOST IMPORTANT	398 39%	110 36%	59 37%	169 36%	87 37%	217 39%	95 40%
2ND MOST IMPORTANT	197 19%	58 19%	22 14%	80 17%	42 18%	98 17%	57 24% E
3RD MOST IMPORTANT	95 9%	23 7%	19 12%	42 9%	19 8%	53 9%	23 10%
Not Ranked	338 33%	117 38%	61 38%	178 38%	85 37% F	193 34% F	59 25%

1_2. (Retirement savings) The statements below are a list of different financial priorities that you might currently have. Please select up to three that are the most important priorities to you right now. Put them in order of importance.

Proportions/Means: Columns Tested (5% risk level) - A/B/C - D/E/F Overlap formulae used.

	Total	AGE			INVESTMENT KNOWLEDGE		
		50-59	60-69	50-69	A/B	C	D/F
		A	B	C	D	E	F
Base: All respondents	1028	338	180	518	237	557	234
Weighted	1028	308	161	468	232	562	233
1ST MOST IMPORTANT	155 15%	85 28%	31 20%	116 25%	42 18% F	92 16% F	21 9%
2ND MOST IMPORTANT	211 20%	76 25%	40 25%	116 25%	51 22% F	126 22% F	33 14%
3RD MOST IMPORTANT	130 13%	39 13%	14 9%	54 11%	30 13%	77 14%	23 10%
Not Ranked	532 52%	108 35%	75 47% AC	183 39% A	110 47%	266 47%	156 67% DE

1_3. (General savings for a rainy day) The statements below are a list of different financial priorities that you might currently have. Please select up to three that are the most important priorities to you right now. Put them in order of importance.

Proportions/Mean: Columns Tested (5% risk level) - A/B/C - D/E/F Overlap formulae used.

	Total	AGE			INVESTMENT KNOWLEDGE		
		50-59	60-69	50-69	A/B	C	D/F
		A	B	C	D	E	F
Base: All respondents	1028	338	180	518	237	557	234
Weighted	1028	308	161	468	232	562	233
1ST MOST IMPORTANT	62 6%	13 4%	14 9%	27 6% A	15 6%	41 7% F	6 2%
2ND MOST IMPORTANT	188 18%	53 17%	29 18%	83 18%	44 19%	102 18%	42 18%
3RD MOST IMPORTANT	261 25%	71 23%	45 28%	116 25%	70 30% E	128 23%	64 27%
Not Ranked	517 50%	170 55% BC	73 45%	242 52% B	103 45%	292 52%	122 52%

1_4. (Just trying to keep your head above water) The statements below are a list of different financial priorities that you might currently have. Please select up to three that are the most important priorities to you right now. Put them in order of importance.

Proportions/Means: Columns Tested (5% risk level) - A/B/C - D/E/F Overlap formulae used.

	Total	AGE			INVESTMENT KNOWLEDGE		
		50-59	60-69	50-69	A/B	C	D/F
		A	B	C	D	E	F
Base: All respondents	1028	338	180	518	237	557	234
Weighted	1028	308	161	468	232	562	233
1ST MOST IMPORTANT	184 18%	47 15%	23 14%	70 15%	18 8%	93 17% D	73 31% DE
2ND MOST IMPORTANT	111 11%	31 10%	16 10%	47 10%	12 5%	60 11% D	39 17% DE
3RD MOST IMPORTANT	95 9%	28 9%	19 12%	47 10%	12 5%	60 11% D	23 10%
Not Ranked	639 62%	201 65%	102 64%	304 65%	190 82% EF	349 62% F	99 43%

1_6. (Savings for a large self rewarding purchase) The statements below are a list of different financial priorities that you might currently have. Please select up to three that are the most important priorities to you right now. Put them in order of importance.

Proportions/Means: Columns Tested (5% risk level) - A/B/C - D/E/F Overlap formulae used.

	Total	AGE			INVESTMENT KNOWLEDGE		
		50-59	60-69	50-69	A/B	C	D/F
		A	B	C	D	E	F
Base: All respondents	1028	338	180	518	237	557	234
Weighted	1028	308	161	468	232	562	233
1ST MOST IMPORTANT	27 3%	5 2%	4 3%	9 2%	8 4%	14 3%	4 2%
2ND MOST IMPORTANT	48 5%	13 4%	9 5%	22 5%	14 6%	23 4%	11 5%
3RD MOST IMPORTANT	113 11%	39 13%	15 9%	54 12%	32 14%	55 10%	26 11%
Not Ranked	840 82%	251 82%	133 83%	383 82%	178 77%	470 84% D	192 82%

1_7. (Saving for children or grandchildren's education) The statements below are a list of different financial priorities that you might currently have. Please select up to three that are the most important priorities to you right now. Put them in order of importance.

Proportions/Means: Columns Tested (5% risk level) - A/B/C - D/E/F Overlap formulae used.

	Total	AGE			INVESTMENT KNOWLEDGE		
		50-59	60-69	50-69	A/B	C	D/F
		A	B	C	D	E	F
Base: All respondents	1028	338	180	518	237	557	234
Weighted	1028	308	161	468	232	562	233
1ST MOST IMPORTANT	23 2%	4 1%	1 1%	5 1%	5 2%	16 3%	2 1%
2ND MOST IMPORTANT	37 4%	9 3%	3 2%	11 2%	11 5%	17 3%	9 4%
3RD MOST IMPORTANT	50 5%	8 3%	4 2%	12 3%	12 5%	26 5%	13 5%
Not Ranked	918 89%	287 93%	153 95%	440 94%	204 88%	504 90%	210 90%

1_8. (Home renovation) The statements below are a list of different financial priorities that you might currently have. Please select up to three that are the most important priorities to you right now. Put them in order of importance.

Proportions/Means: Columns Tested (5% risk level) - A/B/C - D/E/F Overlap formulae used.

	Total	AGE			INVESTMENT KNOWLEDGE		
		50-59	60-69	50-69	A/B	C	D/F
		A	B	C	D	E	F
Base: All respondents	1028	338	180	518	237	557	234
Weighted	1028	308	161	468	232	562	233
1ST MOST IMPORTANT	36 3%	11 4%	12 8%	24 5%	11 5%	15 3%	10 4%
2ND MOST IMPORTANT	81 8%	22 7%	21 13% AC	43 9% A	17 7%	52 9% F	11 5%
3RD MOST IMPORTANT	113 11%	45 15%	24 15%	68 15%	26 11%	62 11%	25 11%
Not Ranked	799 78%	229 75% BC	104 65%	333 71% B	178 77%	433 77%	188 80%

1_9. (Building an investment portfolio) The statements below are a list of different financial priorities that you might currently have. Please select up to three that are the most important priorities to you right now. Put them in order of importance.

Proportions/Means: Columns Tested (5% risk level) - A/B/C - D/E/F Overlap formulae used.

	Total	AGE			INVESTMENT KNOWLEDGE		
		50-59	60-69	50-69	A/B	C	D/F
		A	B	C	D	E	F
Base: All respondents	1028	338	180	518	237	557	234
Weighted	1028	308	161	468	232	562	233
1ST MOST IMPORTANT	29 3%	9 3%	8 5%	17 4%	18 8% EF	11 2% F	0 -
2ND MOST IMPORTANT	56 5%	22 7%	11 7%	33 7%	18 8% F	34 6% F	4 2%
3RD MOST IMPORTANT	77 7%	29 10%	10 6%	39 8%	21 9% F	46 8%	10 4%
Not Ranked	866 84%	247 80%	132 82%	379 81%	175 75%	471 84% D	220 94% DE

1_10. (Supporting aging parents) The statements below are a list of different financial priorities that you might currently have. Please select up to three that are the most important priorities to you right now. Put them in order of importance.

Proportions/Means: Columns Tested (5% risk level) - A/B/C - D/E/F Overlap formulae used.

	Total	AGE			INVESTMENT KNOWLEDGE		
		50-59	60-69	50-69	A/B	C	D/F
		A	B	C	D	E	F
Base: All respondents	1028	338	180	518	237	557	234
Weighted	1028	308	161	468	232	562	233
1ST MOST IMPORTANT	15 1%	6 2%	0 -	6 1%	4 2%	7 1%	3 1%
2ND MOST IMPORTANT	15 1%	5 2%	1 0%	6 1%	2 1%	8 1%	5 2%
3RD MOST IMPORTANT	28 3%	13 4% BC	1 0%	14 3% B	3 1%	15 3%	11 5% D
Not Ranked	970 94%	283 92%	159 99% AC	442 94% A	223 96%	532 95%	214 92%

1. (Rank 1 Summary) The statements below are a list of different financial priorities that you might currently have. Please select up to three that are the most important priorities to you right now. Put them in order of importance.

Proportions/Means: Columns Tested (5% risk level) - A/B/C - D/E/F Overlap formulae used.

	Total	AGE			INVESTMENT KNOWLEDGE		
		50-59	60-69	50-69	A/B	C	D/F
		A	B	C	D	E	F
Base: All respondents	1028	338	180	518	237	557	234
Weighted	1028	308	161	468	232	562	233
Regular payments to reduce or eliminate debt	398 39%	110 36%	59 37%	169 36%	87 37%	217 39%	95 40%
Just trying to keep your head above water	184 18%	47 15%	23 14%	70 15%	18 8%	93 17% D	73 31% DE
Retirement savings	155 15%	85 28%	31 20%	116 25%	42 18% F	92 16% F	21 9%
Home ownership	100 10%	17 5%	8 5%	25 5%	25 11%	56 10%	19 8%
General savings for a rainy day	62 6%	13 4%	14 9%	27 6% A	15 6%	41 7% F	6 2%
Home renovation	36 3%	11 4%	12 8%	24 5%	11 5%	15 3%	10 4%
Building an investment portfolio	29 3%	9 3%	8 5%	17 4%	18 8% EF	11 2% F	0 -
Savings for a large self rewarding purchase	27 3%	5 2%	4 3%	9 2%	8 4%	14 3%	4 2%
Saving for children or grandchildren's education	23 2%	4 1%	1 1%	5 1%	5 2%	16 3%	2 1%
Supporting aging parents	15 1%	6 2%	0 -	6 1%	4 2%	7 1%	3 1%

1. (Rank 2 Summary) The statements below are a list of different financial priorities that you might currently have. Please select up to three that are the most important priorities to you right now. Put them in order of importance.

Proportions/Means: Columns Tested (5% risk level) - A/B/C - D/E/F Overlap formulae used.

	Total	AGE			INVESTMENT KNOWLEDGE		
		50-59	60-69	50-69	A/B	C	D/F
		A	B	C	D	E	F
Base: All respondents	1028	338	180	518	237	557	234
Weighted	1028	308	161	468	232	562	233
Retirement savings	211 20%	76 25%	40 25%	116 25%	51 22% F	126 22% F	33 14%
Regular payments to reduce or eliminate debt	197 19%	58 19%	22 14%	80 17%	42 18%	98 17%	57 24% E
General savings for a rainy day	188 18%	53 17%	29 18%	83 18%	44 19%	102 18%	42 18%
Just trying to keep your head above water	111 11%	31 10%	16 10%	47 10%	12 5%	60 11% D	39 17% DE
Home ownership	84 8%	19 6%	9 6%	28 6%	21 9%	41 7%	23 10%
Home renovation	81 8%	22 7%	21 13% AC	43 9% A	17 7%	52 9% F	11 5%
Building an investment portfolio	56 5%	22 7%	11 7%	33 7%	18 8% F	34 6% F	4 2%
Savings for a large self rewarding purchase	48 5%	13 4%	9 5%	22 5%	14 6%	23 4%	11 5%
Saving for children or grandchildren's education	37 4%	9 3%	3 2%	11 2%	11 5%	17 3%	9 4%
Supporting aging parents	15 1%	5 2%	1 0%	6 1%	2 1%	8 1%	5 2%

1. (Rank 3 Summary) The statements below are a list of different financial priorities that you might currently have. Please select up to three that are the most important priorities to you right now. Put them in order of importance.

Proportions/Mean: Columns Tested (5% risk level) - A/B/C - D/E/F Overlap formulae used.

	Total	AGE			INVESTMENT KNOWLEDGE		
		50-59	60-69	50-69	A/B	C	D/F
		A	B	C	D	E	F
Base: All respondents	1028	338	180	518	237	557	234
Weighted	1028	308	161	468	232	562	233
General savings for a rainy day	261 25%	71 23%	45 28%	116 25%	70 30% E	128 23%	64 27%
Retirement savings	130 13%	39 13%	14 9%	54 11%	30 13%	77 14%	23 10%
Home renovation	113 11%	45 15%	24 15%	68 15%	26 11%	62 11%	25 11%
Savings for a large self rewarding purchase	113 11%	39 13%	15 9%	54 12%	32 14%	55 10%	26 11%
Regular payments to reduce or eliminate debt	95 9%	23 7%	19 12%	42 9%	19 8%	53 9%	23 10%
Just trying to keep your head above water	95 9%	28 9%	19 12%	47 10%	12 5%	60 11% D	23 10%
Building an investment portfolio	77 7%	29 10%	10 6%	39 8%	21 9% F	46 8%	10 4%
Home ownership	66 6%	12 4%	11 7%	22 5%	8 4%	41 7%	17 7%
Saving for children or grandchildren's education	50 5%	8 3%	4 2%	12 3%	12 5%	26 5%	13 5%
Supporting aging parents	28 3%	13 4% BC	1 0%	14 3% B	3 1%	15 3%	11 5% D

1. (Rank 1-3 Summary) The statements below are a list of different financial priorities that you might currently have. Please select up to three that are the most important priorities to you right now. Put them in order of importance.

Proportions/Mean: Columns Tested (5% risk level) - A/B/C - D/E/F Overlap formulae used.

	Total	AGE			INVESTMENT KNOWLEDGE		
		50-59	60-69	50-69	A/B	C	D/F
		A	B	C	D	E	F
Base: All respondents	1028	338	180	518	237	557	234
Weighted	1028	308	161	468	232	562	233
Regular payments to reduce or eliminate debt	690 67%	191 62%	100 62%	290 62%	147 63%	369 66%	175 75% DE
General savings for a rainy day	511 50%	138 45%	88 55% AC	226 48% A	129 55%	270 48%	112 48%
Retirement savings	496 48%	200 65% BC	86 53%	285 61% B	123 53% F	296 53% F	77 33%
Just trying to keep your head above water	389 38%	106 35%	58 36%	165 35%	42 18%	213 38% D	134 57% DE
Home ownership	250 24%	48 15%	28 17%	75 16%	54 23%	137 24%	59 25%
Home renovation	229 22%	78 25%	57 35% AC	135 29% A	54 23%	129 23%	46 20%
Savings for a large self rewarding purchase	188 18%	57 18%	28 17%	85 18%	54 23% E	92 16%	42 18%
Building an investment portfolio	162 16%	60 20%	28 18%	89 19%	57 25% EF	91 16% F	14 6%
Saving for children or grandchildren's education	110 11%	20 7%	8 5%	28 6%	28 12%	59 10%	24 10%
Supporting aging parents	58 6%	25 8% BC	1 1%	26 6% B	9 4%	30 5%	19 8%

8. It seems like everyone is talking about the current market environment and there is a lot of information out there. Which of the following reflects where you are likely to get financial information that you will use.

Proportions/Mean: Columns Tested (5% risk level) - A/B/C - D/E/F Overlap formulae used.

	Total	AGE			INVESTMENT KNOWLEDGE		
		50-59	60-69	50-69	A/B	C	D/F
		A	B	C	D	E	F
Base: All respondents	1028	338	180	518	237	557	234
Weighted	1028	308	161	468	232	562	233
Advice from one or more professional financial advisors	464 45%	142 46%	92 57% AC	235 50% A	123 53% F	269 48% F	72 31%
Newspaper, magazines or television	402 39%	115 37%	66 41%	181 39%	120 52% EF	217 39% F	65 28%
Family or friends	275 27%	64 21%	25 16%	89 19%	45 19%	148 26%	82 35% DE
Financial websites or blogs	212 21%	49 16%	23 14%	71 15%	88 38% EF	96 17%	28 12%
Information or newsletters sent to me from a financial institution	204 20%	74 24%	33 20%	106 23%	60 26% F	118 21% F	26 11%
Spouse / partner	185 18%	49 16%	29 18%	78 17%	47 20%	89 16%	49 21%
Information or newsletters sent to me from a financial advisor	153 15%	58 19%	29 18%	86 18%	49 21% F	95 17% F	9 4%
Financial seminars	55 5%	16 5%	8 5%	23 5%	20 9% F	31 5% F	4 2%
I've stopped seeking advice	107 10%	33 11%	18 11%	51 11%	16 7%	49 9%	41 18% DE
I'm open to advice, anywhere from anyone	257 25%	78 25%	31 20%	109 23%	53 23%	128 23%	77 33% DE

9. How, if at all, has your view of your personal retirement changed as a result of the current economy?

Proportions/Mean: Columns Tested (5% risk level) - A/B/C - D/E/F Overlap formulae used.

	Total	AGE			INVESTMENT KNOWLEDGE		
		50-59	60-69	50-69	A/B	C	D/F
		A	B	C	D	E	F
Base: All respondents	1028	338	180	518	237	557	234
Weighted	1028	308	161	468	232	562	233
My view of my retirement hasn't changed.	494 48%	132 43%	103 64% AC	235 50% A	155 67% EF	258 46% F	81 35%
I may have to work longer than I expected to.	204 20%	98 32% BC	24 15%	122 26% B	42 18%	115 20%	47 20%
I haven't really thought about my retirement.	197 19%	25 8% BC	3 2%	28 6% B	33 14%	92 16%	72 31% DE
I will need to put more planning into it than I thought I would.	150 15%	47 15%	17 11%	65 14%	30 13%	90 16%	30 13%
I may not be able to live the lifestyle I thought I would.	144 14%	55 18%	41 25%	96 20%	17 7%	88 16% D	39 17% D
Retirement won't be an option for me.	87 8%	32 11% BC	5 3%	38 8% B	10 4%	32 6%	44 19% DE