

1. At what age do you expect to retire (or at what age did you retire, if already retired)?

		GENDER		AGE			EDUCATION				RETIRED	
	Total	Male	Female	45-49	50-54	55-60	<HS	HS	Post Sec	Univ Grad	Yes	No
		A	B	C	D	E	F	G	H	I		
Base: All respondents	1054	518	536	217	519	318	69	316	493	176	144	910
Weighted	1054	519	535	373	335	346	93*	426	344	191	141	913
45 - 49	79	43	36	61	10	8	7	50	18	4	24	55
	7%	8%	7%	16%	3%	2%	8%	12%	5%	2%	17%	6%
				DE				HI				
50 - 54	111	45	66	9	63	39	13	53	32	13	55	56
	11%	9%	12%	2%	19%	11%	14%	12%	9%	7%	39%	6%
					CE	C						
55 - 59	217	112	105	58	49	109	14	81	64	58	62	155
	21%	22%	20%	16%	15%	32%	15%	19%	19%	30%	44%	17%
						CD				FGH		
60 - 64	187	86	101	57	64	67	12	64	76	36	0	187
	18%	17%	19%	15%	19%	19%	13%	15%	22%	19%	-	21%
									G			
65 - 69	317	157	160	127	106	84	36	118	108	55	0	317
	30%	30%	30%	34%	32%	24%	38%	28%	31%	29%	-	35%
				E	E							
70 - 74	98	54	44	38	30	30	2	48	30	18	0	98
	9%	10%	8%	10%	9%	9%	3%	11%	9%	9%	-	11%
								F				
75 - 79	24	8	16	10	7	7	3	8	9	5	0	24
	2%	2%	3%	3%	2%	2%	4%	2%	2%	2%	-	3%
80 - 84	8	5	3	2	2	3	1	1	5	1	0	8
	1%	1%	1%	1%	1%	1%	1%	0	1%	0	-	1%
85 - 99	13	8	5	9	4	0	3	4	3	3	0	13
	1%	2%	1%	2%	1%	-	4%	1%	1%	1%	-	1%
				E	E							
Summary												
Mean	60.8	61.1	60.6	61.3	61	60.3	61.7	59.9	61.4	61.5	52.6	62.1
									G			
Std. Dev.	7.9	8.14	7.66	9.3	7.61	6.39	9.46	8.26	7.25	7.22	3.64	7.61
Std. Err.	0.24	0.36	0.33	0.63	0.33	0.36	1.14	0.46	0.33	0.54	0.3	0.25
Median	60	60	60	65	60	60	60	60	60	60	53	65

Proportions/Mean: Columns Tested (5% risk level) - A/B - C/D/E - F/G/H/I Overlap formulae used. \* small base

2. Do you feel that you're on the right financial track for a satisfactory retirement?

		GENDER		AGE			EDUCATION				RETIRED	
	Total	Male	Female	45-49	50-54	55-60	<HS	HS	Post Sec	Univ Grad	Yes	No
		A	B	C	D	E	F	G	H	I		
Base: All respondents	1054	518	536	217	519	318	69	316	493	176	144	910
Weighted	1054	519	535	373	335	346	93*	426	344	191	141	913
Yes	546	261	285	165	172	209	37	211	174	124	111	435
	52%	50%	53%	44%	51%	60%	39%	50%	51%	65%	79%	48%
						CD				FGH		
No	508	258	250	207	164	137	57	215	170	67	30	478
	48%	50%	47%	56%	49%	40%	61%	50%	49%	35%	21%	52%
				E	E		I	I	I			

Proportions/Mean: Columns Tested (5% risk level) - A/B - C/D/E - F/G/H/I Overlap formulae used. \* small base

3. Do you intend on remaining in your current home during retirement?

		GENDER		AGE			EDUCATION				RETIRED	
	Total	Male	Female	45-49	50-54	55-60	<HS	HS	Post Sec	Univ Grad	Yes	No
		A	B	C	D	E	F	G	H	I		
Base: All respondents	1054	518	536	217	519	318	69	316	493	176	144	910
Weighted	1054	519	535	373	335	346	93*	426	344	191	141	913
Yes -- I will remain in my home for as long as I can	640	300	340	180	216	244	60	263	189	128	110	529
	61%	58%	64%	48%	64%	71%	64%	62%	55%	67%	78%	58%
					C	C				H		
No -- I will move	254	131	123	110	78	66	12	99	95	48	19	235
	24%	25%	23%	30%	23%	19%	13%	23%	28%	25%	13%	26%
				E					F			
I don't live in my own home right now	161	88	72	83	42	35	21	65	60	14	12	149
	15%	17%	13%	22%	12%	10%	23%	15%	17%	8%	8%	16%
				DE			I	I	I			

Proportions/Mean: Columns Tested (5% risk level) - A/B - C/D/E - F/G/H/I Overlap formulae used. \* small base

4. What kind of debt do you expect to have when you enter retirement (if retired, what debt did you have when you retired)?

		GENDER		AGE			EDUCATION				RETIRED	
	Total	Male	Female	45-49	50-54	55-60	<HS	HS	Post Sec	Univ Grad	Yes	No
		A	B	C	D	E	F	G	H	I		
Base: All respondents	1054	518	536	217	519	318	69	316	493	176	144	910
Weighted	1054	519	535	373	335	346	93*	426	344	191	141	913
Mortgage	215	106	110	71	67	77	29	80	66	41	40	175
	20%	20%	20%	19%	20%	22%	31%	19%	19%	22%	28%	19%
							GH					
Line of credit	208	103	105	54	60	94	18	80	72	39	33	175
	20%	20%	20%	14%	18%	27%	19%	19%	21%	20%	23%	19%
						CD						
Credit card debt	239	137	101	91	75	74	23	94	88	34	23	216
	23%	27%	19%	24%	22%	21%	24%	22%	26%	18%	16%	24%
		B										
Other	65	35	30	27	20	18	6	25	27	8	5	61
	6%	7%	6%	7%	6%	5%	6%	6%	8%	4%	3%	7%
No debt at all	543	245	298	194	181	169	40	234	162	106	77	466
	51%	47%	56%	52%	54%	49%	43%	55%	47%	56%	55%	51%
			A					H				

Proportions/Mean: Columns Tested (5% risk level) - A/B - C/D/E - F/G/H/I Overlap formulae used. \* small base

5. Would you consider leveraging your home equity to help finance your retirement?

		GENDER		AGE			EDUCATION				RETIRED	
	Total	Male	Female	45-49	50-54	55-60	<HS	HS	Post Sec	Univ Grad	Yes	No
		A	B	C	D	E	F	G	H	I		
Base: All respondents	1054	518	536	217	519	318	69	316	493	176	144	910
Weighted	1054	519	535	373	335	346	93*	426	344	191	141	913
Definitely	45	26	19	11	13	21	2	17	12	14	12	33
	4%	5%	4%	3%	4%	6%	3%	4%	3%	7%	9%	4%
Maybe	286	177	109	101	97	89	22	117	89	58	27	259
	27%	34%	20%	27%	29%	26%	24%	27%	26%	30%	19%	28%
		B										
No	548	247	301	181	171	195	40	217	188	103	88	460
	52%	48%	56%	49%	51%	57%	43%	51%	55%	54%	62%	50%
			A									
I'm not familiar with this option	175	69	106	80	55	40	28	75	55	16	14	161
	17%	13%	20%	21%	16%	12%	30%	18%	16%	8%	10%	18%
			A	E			GHI	I	I			
Base: Intend on remaining in current home during retirement	654	310	344	102	330	222	42	205	285	122	110	544
Weighted	640	300	340	180*	216	244	60*	263	189	128	110*	529
Definitely	29	14	15	7	7	15	2	10	6	10	9	20
	5%	5%	4%	4%	3%	6%	4%	4%	3%	8%	8%	4%
Maybe	200	118	81	61	67	71	16	88	57	38	23	177
	31%	39%	24%	34%	31%	29%	28%	33%	30%	30%	21%	33%
		B										
No	317	135	182	76	106	135	20	123	104	70	70	247
	50%	45%	54%	42%	49%	55%	34%	47%	55%	54%	63%	47%
			A			C			F	F		
I'm not familiar with this option	94	32	61	35	35	24	21	42	21	10	9	85
	15%	11%	18%	20%	16%	10%	35%	16%	11%	8%	8%	16%
			A	E	E		GHI					

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