



# Financial Expenditures

Prepared by Jay R. Lucas, CCIM

2828 E Trinity Mills Rd  
Carrollton, TX 75006

Site Type: Radius

Latitude: 32.986933  
Longitude: -96.85375  
Radius: 0.5 mile

Demographic Summary	2006	2011
Population	3,779	4,420
Households	1,856	2,147
Families	741	818
Median Age	32.0	32.9
Median Household Income	\$59,911	\$74,932

	Spending Potential Index	Average	Total
<b>Assets</b>			
<b>Market Value</b>			
Checking Accounts	98	\$4,943.69	\$9,175,496
Savings Accounts	92	\$9,001.17	\$16,706,164
U.S. Savings Bonds	80	\$532.84	\$988,942
Stocks, Bonds & Mutual Funds	81	\$26,076.05	\$48,397,151
<b>Annual Changes</b>			
Checking Accounts	75	\$-102.23	\$-189,733
Savings Accounts	13	\$-6.88	\$-12,774
U.S. Savings Bonds	109	\$37.93	\$70,390
<b>Earnings</b>			
Dividends, Royalties, Estates, Trusts	97	\$583.32	\$1,082,633
Interest from Savings Accounts or Bonds	92	\$614.29	\$1,140,127
Retirement Plan Contributions	108	\$1,638.67	\$3,041,380
<b>Liabilities</b>			
Original Mortgage Amount	105	\$22,561.92	\$41,874,931
Vehicle Loan Amount <sup>1</sup>	112	\$3,983.46	\$7,393,295
<b>Amount Paid: Interest</b>			
Home Mortgage	99	\$4,193.15	\$7,782,483
Lump Sum Home Equity Loan	83	\$112.39	\$208,588
New Car/Truck/Van Loan	113	\$320.26	\$594,401
Used Car/Truck/Van Loan	118	\$325.87	\$604,816
<b>Amount Paid: Principal</b>			
Home Mortgage	91	\$1,404.18	\$2,606,162
Lump Sum Home Equity Loan	78	\$122.20	\$226,807
New Car/Truck/Van Loan	112	\$1,308.87	\$2,429,266
Used Car/Truck/Van Loan	115	\$1,008.72	\$1,872,184
Checking Account and Banking Service Charges	131	\$50.55	\$93,813
Finance Charges, excluding Mortgage/Vehicle	123	\$475.43	\$882,401

**Data Note:** The Spending Potential Index (SPI) is household-based, and represents the asset value or amount spent for a product or service relative to a national average of 100. Annual change may be negative.

<sup>1</sup> **Vehicle Loan Amount** is the amount of a loan for a car, truck, van, boat, camper, motorcycle, motor scooter, or moped, excluding interest.

**Source:** Expenditure data are derived from the 2001, 2002 and 2003 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2006 and 2011.



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Demographic Summary	2006	2011
Population	16,460	19,443
Households	8,411	9,943
Families	3,323	3,778
Median Age	32.3	33.0
Median Household Income	\$60,372	\$75,398

	Spending Potential Index	Average	Total
<b>Assets</b>			
<b>Market Value</b>			
Checking Accounts	103	\$5,191.36	\$43,664,505
Savings Accounts	96	\$9,399.97	\$79,063,109
U.S. Savings Bonds	84	\$561.69	\$4,724,367
Stocks, Bonds & Mutual Funds	84	\$27,173.18	\$228,553,584
<b>Annual Changes</b>			
Checking Accounts	73	-\$98.62	-\$829,520
Savings Accounts	21	-\$10.89	-\$91,585
U.S. Savings Bonds	122	\$42.30	\$355,768
<b>Earnings</b>			
Dividends, Royalties, Estates, Trusts	103	\$618.49	\$5,202,148
Interest from Savings Accounts or Bonds	96	\$646.68	\$5,439,255
Retirement Plan Contributions	115	\$1,739.12	\$14,627,710
<b>Liabilities</b>			
Original Mortgage Amount	112	\$23,953.21	\$201,470,447
Vehicle Loan Amount <sup>1</sup>	123	\$4,364.00	\$36,705,568
<b>Amount Paid: Interest</b>			
Home Mortgage	106	\$4,487.30	\$37,742,651
Lump Sum Home Equity Loan	88	\$118.61	\$997,632
New Car/Truck/Van Loan	124	\$350.33	\$2,946,648
Used Car/Truck/Van Loan	130	\$359.87	\$3,026,881
<b>Amount Paid: Principal</b>			
Home Mortgage	97	\$1,498.62	\$12,604,856
Lump Sum Home Equity Loan	82	\$127.65	\$1,073,706
New Car/Truck/Van Loan	122	\$1,428.83	\$12,017,897
Used Car/Truck/Van Loan	128	\$1,120.94	\$9,428,232
Checking Account and Banking Service Charges	142	\$54.89	\$461,655
Finance Charges, excluding Mortgage/Vehicle	133	\$515.84	\$4,338,729

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Demographic Summary	2006	2011
Population	45,787	52,480
Households	22,732	25,984
Families	9,858	10,948
Median Age	32.8	33.2
Median Household Income	\$62,150	\$75,894

	Spending Potential Index	Average	Total
<b>Assets</b>			
<b>Market Value</b>			
Checking Accounts	102	\$5,134.59	\$116,719,588
Savings Accounts	95	\$9,266.78	\$210,652,539
U.S. Savings Bonds	85	\$563.73	\$12,814,725
Stocks, Bonds & Mutual Funds	84	\$27,143.33	\$617,022,274
<b>Annual Changes</b>			
Checking Accounts	68	-\$92.07	-\$2,092,994
Savings Accounts	39	-\$20.30	-\$461,409
U.S. Savings Bonds	129	\$44.95	\$1,021,872
<b>Earnings</b>			
Dividends, Royalties, Estates, Trusts	104	\$623.29	\$14,168,674
Interest from Savings Accounts or Bonds	96	\$645.26	\$14,668,037
Retirement Plan Contributions	114	\$1,726.31	\$39,242,436
<b>Liabilities</b>			
Original Mortgage Amount	111	\$23,661.86	\$537,881,411
Vehicle Loan Amount <sup>1</sup>	125	\$4,441.00	\$100,952,722
<b>Amount Paid: Interest</b>			
Home Mortgage	106	\$4,488.36	\$102,029,313
Lump Sum Home Equity Loan	88	\$118.31	\$2,689,357
New Car/Truck/Van Loan	126	\$356.41	\$8,101,893
Used Car/Truck/Van Loan	133	\$368.69	\$8,381,048
<b>Amount Paid: Principal</b>			
Home Mortgage	97	\$1,504.70	\$34,204,909
Lump Sum Home Equity Loan	81	\$126.77	\$2,881,696
New Car/Truck/Van Loan	124	\$1,452.07	\$33,008,434
Used Car/Truck/Van Loan	132	\$1,157.12	\$26,303,545
Checking Account and Banking Service Charges	143	\$55.34	\$1,258,019
Finance Charges, excluding Mortgage/Vehicle	135	\$520.85	\$11,839,987

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