



Financial Investments Market Potential

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
Population 18+	3,130	3,698
Households	1,856	2,147
Median Household Income	\$59,911	\$74,932

Product/Consumer Behavior	Expected		MPI
	Number of Adults	Percent	
Use full service bank	1,650	52.7%	104
Use savings & loan	390	12.5%	105
Use credit union	661	21.1%	89
Use federal savings bank	70	2.2%	78
Used ATM/cash machine in last 12 months	1,866	59.6%	128
Banked in person in last 12 months	1,758	56.1%	107
Banked by mail in last 12 months	228	7.3%	123
Banked by phone in last 12 months	675	21.6%	117
Used direct deposit of paycheck in last 12 months	1,200	38.3%	112
Have interest checking account	1,113	35.5%	115
Have non-interest checking account	993	31.7%	113
Have money market account	481	15.4%	125
Have savings account	1,269	40.5%	109
Have 401K retirement savings	593	18.9%	123
Have IRA retirement savings	473	15.1%	108
Have auto loan for new car	332	10.6%	85
Have personal loan for education only	122	3.9%	119
Have home mortgage (1st)	523	16.7%	98
Have 2nd mortgage (equity loan)	195	6.2%	113
Have mortgage refinance/consolidation loan	178	5.7%	106
Have home equity line of credit	149	4.8%	105
Have personal line of credit	154	4.9%	114
Have overdraft protection	359	11.5%	109
Own any securities investment	802	25.6%	105
Own annuities	69	2.2%	64
Own certificate of deposit (6 months or less)	37	1.2%	56
Own certificate of deposit (more than 6 months)	107	3.4%	79
Own common/preferred stock in company you work for	130	4.2%	113
Own common stock in company you don't work for	244	7.8%	108
Own insured money market account (bank)	73	2.3%	98
Own shares in money market fund	234	7.5%	108
Own shares in mutual fund (bonds)	202	6.5%	122
Own shares in mutual fund (stock)	396	12.6%	128
Own shares in tax exempt fund	51	1.6%	64
Own any stock	355	11.3%	108
Own stock with market value <\$10000	126	4.0%	108
Own stock with market value \$10000-74999	88	2.8%	95
Own stock with market value \$75000+	62	2.0%	81
Own U.S. savings bond	265	8.5%	111
Used stock rating service in last 12 months	69	2.2%	119
Used financial planning counsel in last 12 months	260	8.3%	121
Used brokerage firm in last 12 mo: Fidelity	93	3.0%	130

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. average. An MPI of 100 represents the U.S. average.

Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by Mediamark Research Inc. in a nationally representative survey of U.S. households.



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Product/Consumer Behavior	Expected Number of Adults	Percent	MPI
Own any credit/debit card (in own name)	2,340	74.7%	114
Own American Express card (in own name)	340	10.9%	157
Own Discover card (in own name)	416	13.3%	103
Own MasterCard (in own name)	1,124	35.9%	116
Own Visa (in own name)	1,357	43.3%	119
Own any department store credit card (in own name)	993	31.7%	98
Avg monthly credit card expenditures: <\$111	468	14.9%	92
Avg monthly credit card expenditures: \$111-225	363	11.6%	128
Avg monthly credit card expenditures: \$226-450	279	8.9%	110
Avg monthly credit card expenditures: \$451-700	251	8.0%	142
Avg monthly credit card expenditures: \$701+	464	14.8%	143
Banking/financial service: use mutual funds company	168	5.4%	121
Did banking over the Internet in last 12 months	718	22.9%	146

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Demographic Summary	2006	2011
Population	16,460	19,443
Population 18+	13,404	15,980
Households	8,411	9,943
Median Household Income	\$60,372	\$75,398

Product/Consumer Behavior	Expected		MPI
	Number of Adults	Percent	
Use full service bank	7,072	52.8%	104
Use savings & loan	1,653	12.3%	104
Use credit union	3,133	23.4%	98
Use federal savings bank	299	2.2%	78
Used ATM/cash machine in last 12 months	7,965	59.4%	127
Banked in person in last 12 months	7,491	55.9%	107
Banked by mail in last 12 months	991	7.4%	125
Banked by phone in last 12 months	3,020	22.5%	123
Used direct deposit of paycheck in last 12 months	5,253	39.2%	115
Have interest checking account	4,725	35.3%	114
Have non-interest checking account	4,169	31.1%	111
Have money market account	1,943	14.5%	118
Have savings account	5,459	40.7%	110
Have 401K retirement savings	2,499	18.6%	122
Have IRA retirement savings	1,914	14.3%	102
Have auto loan for new car	1,528	11.4%	92
Have personal loan for education only	544	4.1%	124
Have home mortgage (1st)	2,294	17.1%	100
Have 2nd mortgage (equity loan)	803	6.0%	108
Have mortgage refinance/consolidation loan	759	5.7%	106
Have home equity line of credit	631	4.7%	104
Have personal line of credit	641	4.8%	111
Have overdraft protection	1,543	11.5%	109
Own any securities investment	3,374	25.2%	103
Own annuities	316	2.4%	68
Own certificate of deposit (6 months or less)	181	1.4%	64
Own certificate of deposit (more than 6 months)	446	3.3%	77
Own common/preferred stock in company you work for	575	4.3%	116
Own common stock in company you don't work for	985	7.3%	102
Own insured money market account (bank)	324	2.4%	102
Own shares in money market fund	925	6.9%	100
Own shares in mutual fund (bonds)	808	6.0%	114
Own shares in mutual fund (stock)	1,632	12.2%	123
Own shares in tax exempt fund	238	1.8%	70
Own any stock	1,502	11.2%	107
Own stock with market value <\$10000	542	4.0%	108
Own stock with market value \$10000-74999	366	2.7%	92
Own stock with market value \$75000+	283	2.1%	86
Own U.S. savings bond	1,040	7.8%	102
Used stock rating service in last 12 months	318	2.4%	128
Used financial planning counsel in last 12 months	1,054	7.9%	115
Used brokerage firm in last 12 mo: Fidelity	368	2.7%	120

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Product/Consumer Behavior	Expected Number of Adults	Percent	MPI
Own any credit/debit card (in own name)	9,742	72.7%	111
Own American Express card (in own name)	1,283	9.6%	138
Own Discover card (in own name)	1,751	13.1%	102
Own MasterCard (in own name)	4,669	34.8%	113
Own Visa (in own name)	5,794	43.2%	119
Own any department store credit card (in own name)	4,198	31.3%	97
Avg monthly credit card expenditures: <\$111	2,013	15.0%	92
Avg monthly credit card expenditures: \$111-225	1,434	10.7%	118
Avg monthly credit card expenditures: \$226-450	1,177	8.8%	108
Avg monthly credit card expenditures: \$451-700	1,001	7.5%	132
Avg monthly credit card expenditures: \$701+	1,849	13.8%	133
Banking/financial service: use mutual funds company	711	5.3%	120
Did banking over the Internet in last 12 months	3,129	23.3%	148

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Demographic Summary	2006	2011
Population	45,787	52,480
Population 18+	36,658	42,389
Households	22,732	25,984
Median Household Income	\$62,150	\$75,894

Product/Consumer Behavior	Expected		MPI
	Number of Adults	Percent	
Use full service bank	19,152	52.2%	103
Use savings & loan	4,576	12.5%	105
Use credit union	9,335	25.5%	107
Use federal savings bank	866	2.4%	83
Used ATM/cash machine in last 12 months	21,365	58.3%	125
Banked in person in last 12 months	20,176	55.0%	105
Banked by mail in last 12 months	2,632	7.2%	122
Banked by phone in last 12 months	8,334	22.7%	124
Used direct deposit of paycheck in last 12 months	14,488	39.5%	116
Have interest checking account	12,710	34.7%	112
Have non-interest checking account	11,098	30.3%	108
Have money market account	5,079	13.9%	113
Have savings account	14,827	40.4%	109
Have 401K retirement savings	6,520	17.8%	116
Have IRA retirement savings	5,013	13.7%	98
Have auto loan for new car	4,388	12.0%	96
Have personal loan for education only	1,512	4.1%	126
Have home mortgage (1st)	6,236	17.0%	99
Have 2nd mortgage (equity loan)	2,018	5.5%	99
Have mortgage refinance/consolidation loan	1,987	5.4%	101
Have home equity line of credit	1,699	4.6%	102
Have personal line of credit	1,634	4.5%	104
Have overdraft protection	4,125	11.3%	107
Own any securities investment	9,152	25.0%	103
Own annuities	1,016	2.8%	80
Own certificate of deposit (6 months or less)	604	1.6%	78
Own certificate of deposit (more than 6 months)	1,205	3.3%	76
Own common/preferred stock in company you work for	1,640	4.5%	121
Own common stock in company you don't work for	2,606	7.1%	99
Own insured money market account (bank)	948	2.6%	109
Own shares in money market fund	2,424	6.6%	96
Own shares in mutual fund (bonds)	2,035	5.6%	105
Own shares in mutual fund (stock)	4,219	11.5%	116
Own shares in tax exempt fund	793	2.2%	85
Own any stock	4,146	11.3%	108
Own stock with market value <\$10000	1,488	4.1%	109
Own stock with market value \$10000-74999	993	2.7%	92
Own stock with market value \$75000+	878	2.4%	98
Own U.S. savings bond	2,650	7.2%	95
Used stock rating service in last 12 months	914	2.5%	135
Used financial planning counsel in last 12 months	2,759	7.5%	110
Used brokerage firm in last 12 mo: Fidelity	946	2.6%	113

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Own any credit/debit card (in own name)	25,588	69.8%	106
Own American Express card (in own name)	3,034	8.3%	120
Own Discover card (in own name)	4,664	12.7%	99
Own MasterCard (in own name)	12,337	33.7%	109
Own Visa (in own name)	15,557	42.4%	117
Own any department store credit card (in own name)	11,169	30.5%	94
Avg monthly credit card expenditures: <\$111	5,536	15.1%	93
Avg monthly credit card expenditures: \$111-225	3,492	9.5%	105
Avg monthly credit card expenditures: \$226-450	3,142	8.6%	106
Avg monthly credit card expenditures: \$451-700	2,446	6.7%	118
Avg monthly credit card expenditures: \$701+	4,700	12.8%	124
Banking/financial service: use mutual funds company	1,911	5.2%	118
Did banking over the Internet in last 12 months	8,357	22.8%	145

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