

## Invested Assets

### DATABASE

Over 120 million households in all 50 states

### KEY BENEFITS

- Based on official reporting of comprehensive source data rather than a much more limited survey sampling approach of random responders gathered over a period of years.
- Timely and accurate, quickly adapting to local market conditions and rapid economic changes because it is based on economic data that is compiled and updated from quarterly financial reporting sources.

### INDUSTRIES

Ideal for:

- Financial Products and Services
- Auto Dealers & Services
- Travel & Entertainment
- Retail
- Any many more...



Genalytics' proprietary Invested Assets score is part of the Genalytics Affluence Indicators covering all households in the country. Genalytics' Invested Assets is offered as a national ranking, as well as by estimated dollar amount under investment. Invested Assets was designed to

reflect the total amount of financial household securities under management including corporate equities, mutual funds, ETF's, Unit Investment Trusts and corporate and government bonds. The Invested Assets score reflects individually held 401Ks, IRAs and money market investments but excludes pensions and real estate holdings that are considered less liquid.

Genalytics Invested Assets is designed to provide marketers and analysts with a higher level of precision and accuracy when planning campaigns that address whether a prospect has the capacity to make investments or afford capital purchase at certain levels. In combination with Genalytics Premium Income Estimate and Discretionary Income, Invested Assets is another tool for marketers to assess whether prospects can afford the product or service they are promoting.

### Unrestricted Application for All Campaigns

Genalytics' Invested Assets was created from source data that is publicly available and unrestricted by FCRA rules or limitations. Invested Assets utilizes government economic data from the Federal Reserve, the IRS, and Congressional Research Service and Reports on International and Domestic Capital Flows to establish benchmark metrics for allocations of investment by individual forms of financial instrument. This data is then combined with cost-of-living measurements, household age, family composition and the Genalytics

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Affluence data including home values, Premium Income and Discretionary Income. All of these elements are combined in local and regional models that allocate Invested Assets by score and dollar amount across the 90+ million households who have assets under management in a financial institution.

## In the End it is All About Results

There are any number of applications in marketing and analytics for the Genalytics Affluence Indicators. Invested Assets, Income and Discretionary Income are especially powerful factors in determining the target audience when affluence is a logical consideration.

Genalytics' approach to building compelling data elements such as Discretionary Income is to focus on the factors that drive success in campaigns. Genalytics' On-Demand Targeting allows marketers to literally execute a predictive model for every campaign at no additional cost. When combined with the Genalytics Affluence Indicators and a sample of your customers' buyers, a customized prospect universe solution can be built which has been proven to deliver 7.5%-15% better response rates on the average over typical list selection.

### Major challenges with Projecting Invested Assets:

- Compiling a holistic view of all the Household Assets and then applying a systematic pattern for investment behavior based on demographic attributes.
- Assessing life stage and major purchase factors such as college tuition, home mortgages, and automated savings plans that tend to depress spending capacity yet do not materially affect net worth or investment practices.
- Building local and national models that reflect the distribution of investment wealth across the country as verified by various government economic reports.

For more information visit our website at  
**[www.genalytics.com](http://www.genalytics.com)** or call:  
978-684-7580

