

# CLARITAS INCOME PRODUCING ASSETS PROFILES

## RELEASE NOTES FOR ENVISION

### DATA VINTAGE

2019 data applied to 2019 segmentation distributions

### SEGMENTATION SYSTEMS

PRIZM® Premier,  
P\$YCLE®,  
P\$YCLE® Premier

### VARIABLES

Household counts and 11 IPA ranges

### UPDATE FREQUENCY

Annually

To view the complete list of variables please visit:  
[environicsanalytics.com/en-us/variables](http://environicsanalytics.com/en-us/variables)

### WHAT IT IS

Income Producing Assets (IPA) Profiles provides insights into the liquid assets of households. The database is created from responses received through the Claritas Financial Track survey, the largest financial survey of its kind in the industry. The survey collects dollar measures from each survey respondent and the data are aggregated over three years to develop a sample size of more than 200,000 households. The results are used to construct balance information for a variety of financial products and services.

IPA Profiles are designed to work with the PRIZM Premier, P\$YCLE and P\$YCLE Premier segmentation systems to examine the liquid assets of households in any segment or target group.

IPA Profiles are strongly correlated to age and income. They measure liquid wealth such as cash, checking accounts, savings products, money market accounts and CDs, investment products, retirement accounts and other asset classes that are relatively easy to liquidate. The IPA Profiles classifies all U.S. households into one of 11 value ranges, from less than \$25,000 to more than \$3 million.

### WHAT'S NEW

The previous \$2 million+ variable from has been replaced with two new variables: \$2 million to \$3 million and \$3 million+. These new variables will help wealth managers and luxury-good retailers to locate and reach wealthy households.

### HOW IT'S USED



Banks and financial service providers use IPA Profiles to gauge the liquid wealth of any PRIZM Premier, P\$YCLE and P\$YCLE Premier segment or target group.



Wealth Managers can identify trade areas with high concentrations of very wealthy households (IPA \$3 million+) and open new offices in the area.



Non-profit educational, medical and artistic institutions can identify and reach potential donors.

## SAMPLE QUESTIONS IT CAN ANSWER

- How many households in my target groups have an asset base of more than \$3 million?
- Can potential new trade areas support full-service offices based on average income producing assets?
- Which segments contain wealthy households that can support our non-profit organization with large donations?