

CLARITAS NET WORTH 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

WHAT IT IS

Net Worth Profiles provides insight into the net worth of households through the lens of a segmentation system. The database is created from responses to 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 asset classes and debt products that are the core of the Net Worth Profiles.

Net Worth Profiles estimates a household's total assets minus total liabilities. The Net Worth Profiles classifies all U.S. households into one of 11 value ranges, from less than \$25,000 to more than \$2 million.

Net Worth Profiles can be combined with the PRIZM Premier, P\$YCLE and P\$YCLE Premier segmentation systems to examine the net worth of households in any segment or target group.

WHAT'S NEW

The previous \$1 million+ variable was replaced with two new variables: \$1 million to \$2 million and \$2 million+. Net Worth Profiles is now an even more powerful tool for asset managers and insurance companies to locate and reach high net worth households.

The 2019 Net Worth Profiles use the latest 2019 models, developed using 2019 household estimates. Thus Claritas considers this database the 2019 vintage of Net Worth Profiles.

HOW IT'S USED



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



Brokers can identify trade areas with high concentrations of very wealthy segments and open new offices in the area.



Insurance companies can create target groups to better serve households across all Net Worth Profile ranges.

SAMPLE QUESTIONS IT CAN ANSWER

- Which households in my target groups have a net worth of more than \$2 million?
- Can potential new trade areas support asset management services based on net worth?
- Which segments should be included in our target groups based on their Net Worth Profiles?