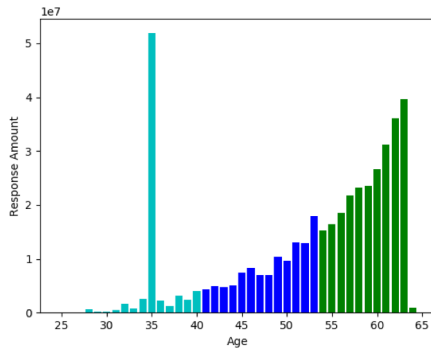
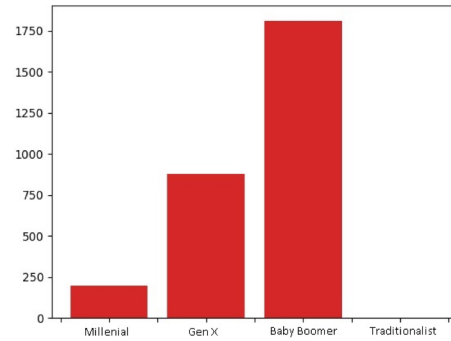


Age—response amount(sum)



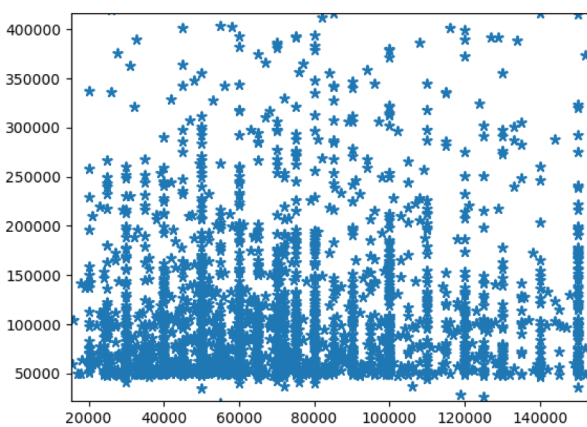
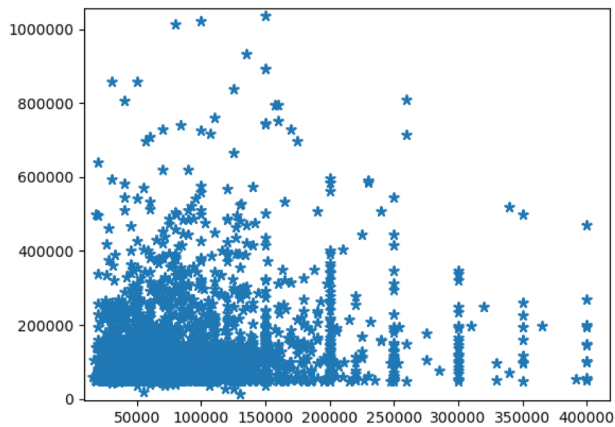
This histogram shows relationship between age and response amount(sum).
This indicates that, the response amount increases with age.
However, there is an odd value shows in age of 35, we can't sure whether it is a noise or an "extraordinary customer".

Generation—response count



This histogram shows relationship between generation and response count.
It indicates that Baby Boomer generation takes

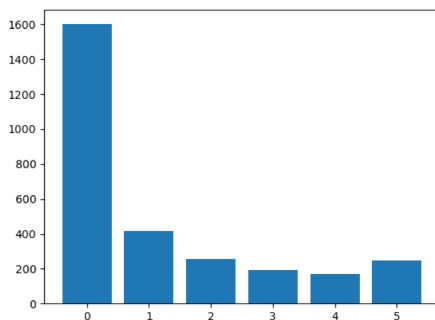
Annual income—response amount customer distribution



Left chart shows that most of customers concentrate in lower left.
Right chart is the zoom-in of customers whose income from 2000-14000(most of customers stays in this range)

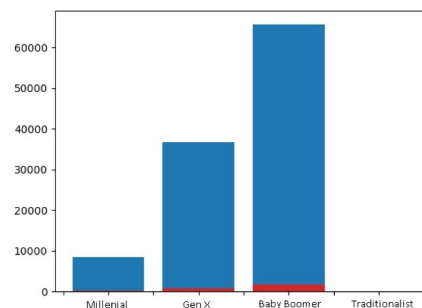
<https://public.tableau.com/profile/meng.li#!/vizhome/ANNUALINCOME---->

IRA contribution-7-years—response count



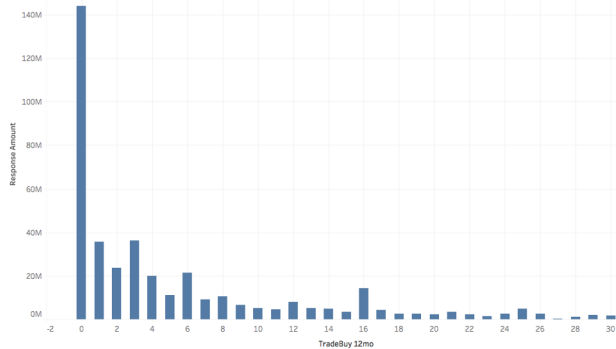
This histogram shows relationship between IRA and response count.

Generation—response count (w/ all customers)



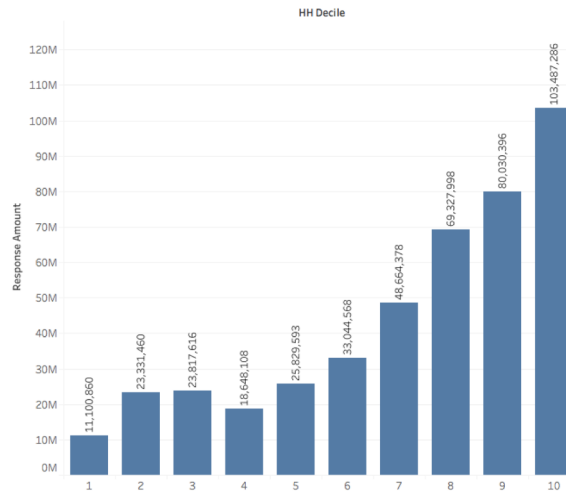
the percentage of response in each generation shows likes this.

TradeBuy12Mo—response amount(sum)

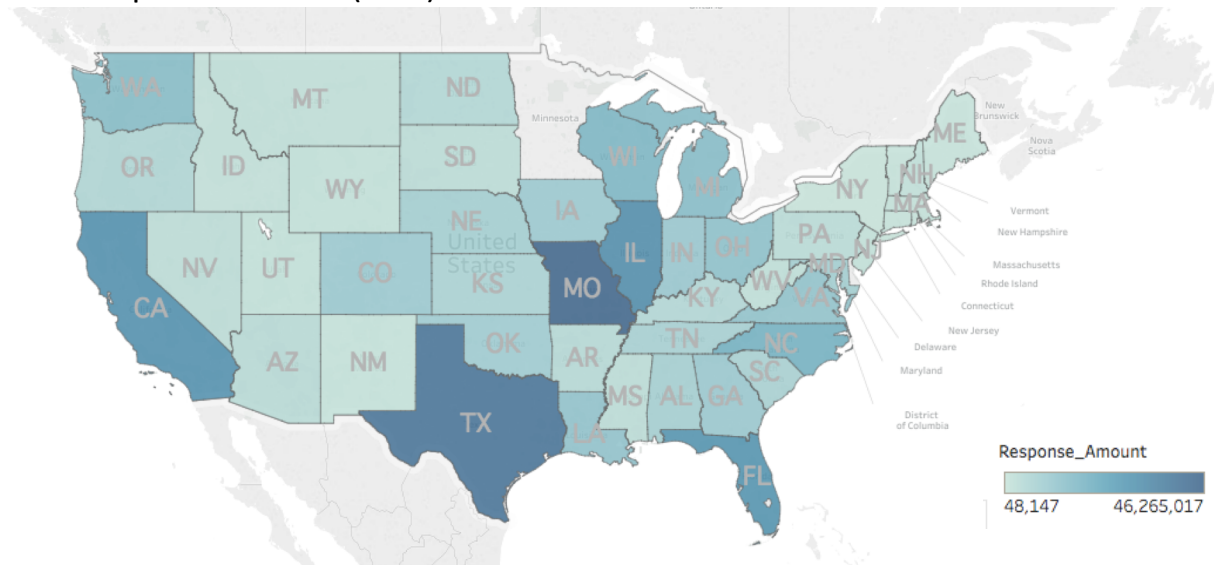


This histogram shows relationship between times of trade buy in one year and response amount(sum). It seems like a long tail data, most of response amount come from customers who did not trade buy in a year. With times of trade buy increase, customers decrease.

HH Decile—Response Amount(sum)



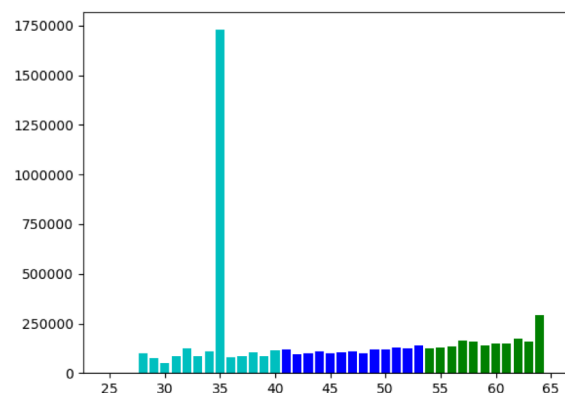
Location—response amount(sum)



Top 10 vocation(occupation+employer)

occupation	employer	count
Business Owner / Self Employed	Self Employed	168
Other	Retired / Not Employed	116
Teaching / Education / Training	Education	110
Healthcare Professional	Health Services	100
Emergency / Protective Service	Health Services	86
Construction / Extraction / Labor	Manufacturing	70
Professional Management / Consultant	Manufacturing	59
Business Owner / Self Employed	Construction / Trades / Labor	45
Sales / Marketing / Advertising /	Retailing	42

Average response amount—Age



Personal Information

Analysis:

Type 1(21%): age in 54-64

Retired flag is 1

Tenure around 7 years.

Type 2(53%): age in 55-61

Retired flag is 0

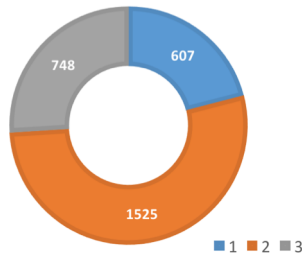
Tenure around 8.6 years

Type 3(26%): age in 38-48

Retired flag is 0

Tenure around 8 years

PERSONAL INFORMATION



life-stable, unretired baby boomers.

Investment Preference

Analysis:

Type 2(20%): Product count is 5

UIT flag is 0

Insurance flag is 0

DCA is 0

Trade Buy times in a year is 10

Type 4(46%): Product count is 2

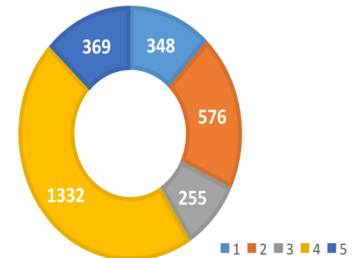
UIT flag is 0

Insurance flag is 0

DCA is 0

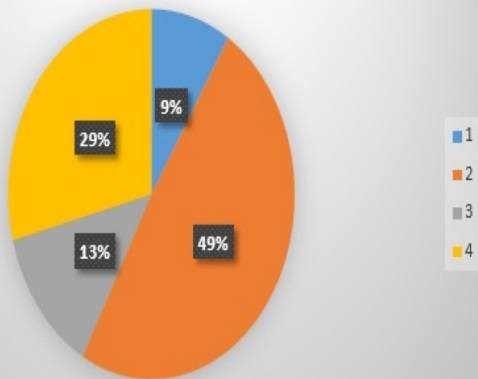
Trade Buy times in a year is 4

INVESTMENT PREFERENCE

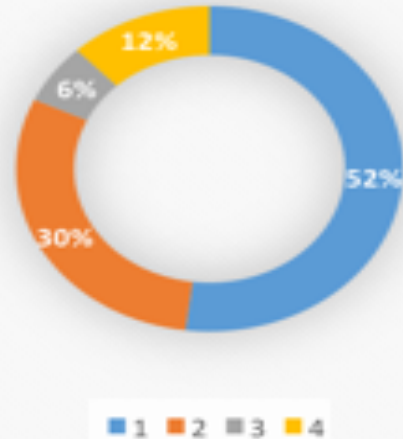


Focused, long-term investment preferred customers

Wealth Clusters



House and Car



House and Car

Attribute	Cluster 1	Cluster 2	Cluster 3	Cluster 4
HOME_SQUARE_FOOTAGE_CD	1.7128	5.7543	3.3718	5.831
HOME_PURCH_Amount_CD	0.0001	3.8892	0.0037	2.506
HOME_EQTY_AVAIL_CD	0.0383	3.8606	2.1035	4.8907
HOME_INS_PURCH_EXPIR_MTH_NO	0.0106	6.6632	0.045	7.1315
VHCL_NEW_CAR_BUYER_IND	0.0857	0.0082	0.8662	0.9942
Percentage	11%	52%	11%	27%

Hobby

Attribute	1	2	3	4
OUTDDOR_GRP_IND	0.6204	0.9563	0.2369	0.5371
TRVL_GRP_IND	0.6144	0.9931	0.1514	0.5565
READ_GRP_IND	0.9989	1	0.3241	1
COOK_FOOD_GRP_IND	0.7554	1	0.2112	0.8587
EXERCISE_HLTH_GRP_IND	0.7419	0.9848	0.0397	0.5705
MOVIE_MUSIC_GRP_IND	0.6609	0.9099	0.0485	0
COLL_ANTIQUA_GRP_IND	0.29097	0.8438	0.0607	0.6703
Percentage	52%	30%	6%	12%

