

## Frequencies

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### Statistics

		Performance of investments with this provider	Fees or commissions charged	Depth of products and services to meet the range of your investment needs	Ability to resolve problems	Online services offered	Multiple providers' products to choose from
N	Valid	458	466	455	457	434	445
	Missing	42	34	45	43	66	55

### Statistics

		Quality of advice	Knowledge of representative s or advisors you deal with	Representative knowing your overall situation and needs	Access to other professional resources	Degree to which my provider knows me	Quality of service
N	Valid	452	457	454	453	461	465
	Missing	48	43	46	47	39	35

### Statistics

		Likelihood to Recommend Primary Provider to Someone I Know	Likelihood of Continuing to Use Primary Provider at Least at the Same Level as Now	Likelihood of Dropping or Replacing Primary Provider	Rating the Advantage of Using Primary Provider Rather Than Other Financial Services Provider	Overall satisfaction with primary provider
N	Valid	471	470	470	462	451
	Missing	29	30	30	38	49

### Statistics

		Performance of investments with this provider	Fees or commissions charged	Depth of products and services to meet the range of your investment needs	Ability to resolve problems	Online services offered	Multiple providers' products to choose from
N	Valid	407	400	385	355	220	312
	Missing	93	100	115	145	280	188

### Statistics

		Quality of advice	Knowledge of representatives or advisors you deal with	Representative knowing your overall situation and needs	Access to other professional resources	Degree to which my provider knows me	Quality of service
N	Valid	375	373	364	288	375	428
	Missing	125	127	136	212	125	72

### Statistics

		Switched Investment Provider in the Past 12 Months	Decision Making Approaches	Age of Household Head	Gender of Household Head	Marital Status	Number of Dependent Children
N	Valid	500	437	481	488	487	466
	Missing	0	63	19	12	13	34

### Statistics

		Responsibility for Major Financial Decisions	Education	Household Head Retirement Status	Recoded Age	Recoded Marital Status	Recoded Number of Dependent Children
N	Valid	474	488	487	481	487	51
	Missing	26	12	13	19	13	449

## Statistics

		Recoded Education	Recoded Advantage of Primary Provider	Recoded Overall Satisfaction
N	Valid	488	462	451
	Missing	12	38	49

## Frequency Table

### Performance of investments with this provider

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not Important At All	15	3.0	3.3	3.3
	Somewhat Unimportant	5	1.0	1.1	4.4
	Somewhat Important	32	6.4	7.0	11.4
	Very Important	182	36.4	39.7	51.1
	Extremely Important	224	44.8	48.9	100.0
	Total	458	91.6	100.0	
Missing	System	42	8.4		
Total		500	100.0		

### Fees or commissions charged

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not Important At All	9	1.8	1.9	1.9
	Somewhat Unimportant	12	2.4	2.6	4.5
	Somewhat Important	157	31.4	33.7	38.2
	Very Important	183	36.6	39.3	77.5
	Extremely Important	105	21.0	22.5	100.0
	Total	466	93.2	100.0	
Missing	System	34	6.8		
Total		500	100.0		

### Depth of products and services to meet the range of your investment needs

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not Important At All	17	3.4	3.7	3.7
	Somewhat Unimportant	22	4.4	4.8	8.6
	Somewhat Important	103	20.6	22.6	31.2
	Very Important	215	43.0	47.3	78.5
	Extremely Important	98	19.6	21.5	100.0
	Total	455	91.0	100.0	
Missing	System	45	9.0		
Total		500	100.0		

### Ability to resolve problems

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not Important At All	15	3.0	3.3	3.3
	Somewhat Unimportant	18	3.6	3.9	7.2
	Somewhat Important	78	15.6	17.1	24.3
	Very Important	212	42.4	46.4	70.7
	Extremely Important	134	26.8	29.3	100.0
	Total	457	91.4	100.0	
Missing	System	43	8.6		
Total		500	100.0		

### Online services offered

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not Important At All	123	24.6	28.3	28.3
	Somewhat Unimportant	76	15.2	17.5	45.9
	Somewhat Important	120	24.0	27.6	73.5
	Very Important	68	13.6	15.7	89.2
	Extremely Important	47	9.4	10.8	100.0
	Total	434	86.8	100.0	
Missing	System	66	13.2		
Total		500	100.0		

### Multiple providers' products to choose from

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not Important At All	39	7.8	8.8	8.8
	Somewhat Unimportant	48	9.6	10.8	19.6
	Somewhat Important	132	26.4	29.7	49.2
	Very Important	159	31.8	35.7	84.9
	Extremely Important	67	13.4	15.1	100.0
	Total	445	89.0	100.0	
Missing	System	55	11.0		
Total		500	100.0		

### Quality of advice

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not Important At All	11	2.2	2.4	2.4
	Somewhat Unimportant	12	2.4	2.7	5.1
	Somewhat Important	47	9.4	10.4	15.5
	Very Important	163	32.6	36.1	51.5
	Extremely Important	219	43.8	48.5	100.0
	Total	452	90.4	100.0	
Missing	System	48	9.6		
Total		500	100.0		

### Knowledge of representatives or advisors you deal with

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not Important At All	16	3.2	3.5	3.5
	Somewhat Unimportant	8	1.6	1.8	5.3
	Somewhat Important	50	10.0	10.9	16.2
	Very Important	175	35.0	38.3	54.5
	Extremely Important	208	41.6	45.5	100.0
	Total	457	91.4	100.0	
Missing	System	43	8.6		
Total		500	100.0		

### Representative knowing your overall situation and needs

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not Important At All	18	3.6	4.0	4.0
	Somewhat Unimportant	26	5.2	5.7	9.7
	Somewhat Important	71	14.2	15.6	25.3
	Very Important	162	32.4	35.7	61.0
	Extremely Important	177	35.4	39.0	100.0
	Total	454	90.8	100.0	
Missing	System	46	9.2		
Total		500	100.0		

### Access to other professional resources

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not Important At All	28	5.6	6.2	6.2
	Somewhat Unimportant	43	8.6	9.5	15.7
	Somewhat Important	163	32.6	36.0	51.7
	Very Important	149	29.8	32.9	84.5
	Extremely Important	70	14.0	15.5	100.0
	Total	453	90.6	100.0	
Missing	System	47	9.4		
Total		500	100.0		

### Degree to which my provider knows me

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not Important At All	24	4.8	5.2	5.2
	Somewhat Unimportant	41	8.2	8.9	14.1
	Somewhat Important	116	23.2	25.2	39.3
	Very Important	168	33.6	36.4	75.7
	Extremely Important	112	22.4	24.3	100.0
	Total	461	92.2	100.0	
Missing	System	39	7.8		
Total		500	100.0		

### Quality of service

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not Important At All	4	.8	.9	.9
	Somewhat Unimportant	1	.2	.2	1.1
	Somewhat Important	23	4.6	4.9	6.0
	Very Important	191	38.2	41.1	47.1
	Extremely Important	246	49.2	52.9	100.0
	Total	465	93.0	100.0	
Missing	System	35	7.0		
Total		500	100.0		

### Likelihood to Recommend Primary Provider to Someone I Know

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Unlikely	31	6.2	6.6	6.6
	Somewhat Unlikely	32	6.4	6.8	13.4
	Somewhat Likely	130	26.0	27.6	41.0
	Very Likely	155	31.0	32.9	73.9
	Extremely Likely	123	24.6	26.1	100.0
	Total	471	94.2	100.0	
Missing	System	29	5.8		
Total		500	100.0		

### Likelihood of Continuing to Use Primary Provider at Least at the Same Level as Now

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Unlikely	9	1.8	1.9	1.9
	Somewhat Unlikely	11	2.2	2.3	4.3
	Somewhat Likely	67	13.4	14.3	18.5
	Very Likely	190	38.0	40.4	58.9
	Extremely Likely	193	38.6	41.1	100.0
	Total	470	94.0	100.0	
Missing	System	30	6.0		
Total		500	100.0		

### Likelihood of Dropping or Replacing Primary Provider

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Unlikely	252	50.4	53.6	53.6
	Somewhat Unlikely	167	33.4	35.5	89.1
	Somewhat Likely	35	7.0	7.4	96.6
	Very Likely	11	2.2	2.3	98.9
	Extremely Likely	5	1.0	1.1	100.0
	Total	470	94.0	100.0	
Missing	System	30	6.0		
Total		500	100.0		

### Rating the Advantage of Using Primary Provider Rather Than Other Financial Services Provider

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No Advantage At All	46	9.2	10.0	10.0
	A Slight Advantage	31	6.2	6.7	16.7
	Somewhat Advantage	172	34.4	37.2	53.9
	A Big Advantage	132	26.4	28.6	82.5
	A Very Big Advantage	81	16.2	17.5	100.0
	Total	462	92.4	100.0	
Missing	System	38	7.6		
Total		500	100.0		

### Overall satisfaction with primary provider

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Poor	11	2.2	2.4	2.4
	Fair	29	5.8	6.4	8.9
	Good	137	27.4	30.4	39.2
	Very Good	162	32.4	35.9	75.2
	Excellent	112	22.4	24.8	100.0
	Total	451	90.2	100.0	
Missing	N/A	15	3.0		
	System	34	6.8		
	Total	49	9.8		
Total		500	100.0		

### Performance of investments with this provider

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Poor	16	3.2	3.9	3.9
	Fair	85	17.0	20.9	24.8
	Good	153	30.6	37.6	62.4
	Very Good	104	20.8	25.6	88.0
	Excellent	49	9.8	12.0	100.0
	Total	407	81.4	100.0	
Missing	N/A	49	9.8		
	System	44	8.8		
	Total	93	18.6		
Total		500	100.0		

### Fees or commissions charged

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Poor	14	2.8	3.5	3.5
	Fair	131	26.2	32.8	36.3
	Good	129	25.8	32.3	68.5
	Very Good	68	13.6	17.0	85.5
	Excellent	58	11.6	14.5	100.0
	Total	400	80.0	100.0	
Missing	N/A	48	9.6		
	System	52	10.4		
	Total	100	20.0		
Total		500	100.0		

### Depth of products and services to meet the range of your investment needs

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Poor	6	1.2	1.6	1.6
	Fair	42	8.4	10.9	12.5
	Good	124	24.8	32.2	44.7
	Very Good	135	27.0	35.1	79.7
	Excellent	78	15.6	20.3	100.0
	Total	385	77.0	100.0	
Missing	N/A	56	11.2		
	System	59	11.8		
	Total	115	23.0		
Total		500	100.0		

### Ability to resolve problems

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Poor	14	2.8	3.9	3.9
	Fair	37	7.4	10.4	14.4
	Good	122	24.4	34.4	48.7
	Very Good	131	26.2	36.9	85.6
	Excellent	51	10.2	14.4	100.0
	Total	355	71.0	100.0	
Missing	N/A	89	17.8		
	System	56	11.2		
	Total	145	29.0		
Total		500	100.0		



### Online services offered

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Poor	4	.8	1.8	1.8
	Fair	24	4.8	10.9	12.7
	Good	70	14.0	31.8	44.5
	Very Good	84	16.8	38.2	82.7
	Excellent	38	7.6	17.3	100.0
	Total	220	44.0	100.0	
Missing	N/A	190	38.0		
	System	90	18.0		
	Total	280	56.0		
Total		500	100.0		

### Multiple providers' products to choose from

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Poor	11	2.2	3.5	3.5
	Fair	31	6.2	9.9	13.5
	Good	103	20.6	33.0	46.5
	Very Good	117	23.4	37.5	84.0
	Excellent	50	10.0	16.0	100.0
	Total	312	62.4	100.0	
Missing	N/A	113	22.6		
	System	75	15.0		
	Total	188	37.6		
Total		500	100.0		

### Quality of advice

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Poor	12	2.4	3.2	3.2
	Fair	55	11.0	14.7	17.9
	Good	125	25.0	33.3	51.2
	Very Good	120	24.0	32.0	83.2
	Excellent	63	12.6	16.8	100.0
	Total	375	75.0	100.0	
Missing	N/A	73	14.6		
	System	52	10.4		
	Total	125	25.0		
Total		500	100.0		

### Knowledge of representatives or advisors you deal with

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Poor	14	2.8	3.8	3.8
	Fair	39	7.8	10.5	14.2
	Good	120	24.0	32.2	46.4
	Very Good	121	24.2	32.4	78.8
	Excellent	79	15.8	21.2	100.0
	Total	373	74.6	100.0	
Missing	N/A	68	13.6		
	System	59	11.8		
	Total	127	25.4		
Total		500	100.0		

### Representative knowing your overall situation and needs

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Poor	20	4.0	5.5	5.5
	Fair	53	10.6	14.6	20.1
	Good	106	21.2	29.1	49.2
	Very Good	101	20.2	27.7	76.9
	Excellent	84	16.8	23.1	100.0
	Total	364	72.8	100.0	
Missing	N/A	84	16.8		
	System	52	10.4		
	Total	136	27.2		
Total		500	100.0		

### Access to other professional resources

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Poor	17	3.4	5.9	5.9
	Fair	37	7.4	12.8	18.8
	Good	108	21.6	37.5	56.3
	Very Good	84	16.8	29.2	85.4
	Excellent	42	8.4	14.6	100.0
	Total	288	57.6	100.0	
Missing	N/A	141	28.2		
	System	71	14.2		
	Total	212	42.4		
Total		500	100.0		

**Degree to which my provider knows me**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Poor	29	5.8	7.7	7.7
	Fair	57	11.4	15.2	22.9
	Good	106	21.2	28.3	51.2
	Very Good	102	20.4	27.2	78.4
	Excellent	81	16.2	21.6	100.0
	Total	375	75.0	100.0	
Missing	N/A	73	14.6		
	System	52	10.4		
	Total	125	25.0		
Total		500	100.0		

**Quality of service**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Poor	6	1.2	1.4	1.4
	Fair	39	7.8	9.1	10.5
	Good	127	25.4	29.7	40.2
	Very Good	157	31.4	36.7	76.9
	Excellent	99	19.8	23.1	100.0
	Total	428	85.6	100.0	
Missing	N/A	21	4.2		
	System	51	10.2		
	Total	72	14.4		
Total		500	100.0		

**Switched Investment Provider in the Past 12 Months**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	72	14.4	14.4	14.4
	No	428	85.6	85.6	100.0
	Total	500	100.0	100.0	

### Decision Making Approaches

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Make own investment decisions without the assistance of an i	114	22.8	26.1	26.1
	Make most of the investment decisions but use an investment	66	13.2	15.1	41.2
	Regularly consult with an investment professional or advisor	142	28.4	32.5	73.7
	Rely upon an investment professional or advisor to make most	115	23.0	26.3	100.0
	Total	437	87.4	100.0	
Missing	System	63	12.6		
Total		500	100.0		

### Age of Household Head

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	30	1	.2	.2	.2
	34	1	.2	.2	.4
	35	1	.2	.2	.6
	36	1	.2	.2	.8
	42	1	.2	.2	1.0
	44	1	.2	.2	1.2
	45	4	.8	.8	2.1
	46	3	.6	.6	2.7
	47	1	.2	.2	2.9
	48	3	.6	.6	3.5
	49	1	.2	.2	3.7
	50	3	.6	.6	4.4
	51	3	.6	.6	5.0
	52	3	.6	.6	5.6
	53	5	1.0	1.0	6.7
	54	11	2.2	2.3	8.9
	55	9	1.8	1.9	10.8
	56	2	.4	.4	11.2
	57	2	.4	.4	11.6
	58	3	.6	.6	12.3
	59	8	1.6	1.7	13.9
	60	11	2.2	2.3	16.2
	61	6	1.2	1.2	17.5
	62	6	1.2	1.2	18.7
	63	6	1.2	1.2	20.0
	64	6	1.2	1.2	21.2
	65	20	4.0	4.2	25.4
	66	17	3.4	3.5	28.9
	67	20	4.0	4.2	33.1
	68	24	4.8	5.0	38.0
	69	23	4.6	4.8	42.8
	70	25	5.0	5.2	48.0

### Age of Household Head

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	71	21	4.2	4.4	52.4
	72	27	5.4	5.6	58.0
	73	24	4.8	5.0	63.0
	74	15	3.0	3.1	66.1
	75	30	6.0	6.2	72.3
	76	18	3.6	3.7	76.1
	77	17	3.4	3.5	79.6
	78	21	4.2	4.4	84.0
	79	13	2.6	2.7	86.7
	80	17	3.4	3.5	90.2
	81	9	1.8	1.9	92.1
	82	9	1.8	1.9	94.0
	83	5	1.0	1.0	95.0
	84	6	1.2	1.2	96.3
	85	8	1.6	1.7	97.9
	86	6	1.2	1.2	99.2
	87	2	.4	.4	99.6
	89	1	.2	.2	99.8
	90	1	.2	.2	100.0
	Total	481	96.2	100.0	
Missing	-9	19	3.8		
Total		500	100.0		

### Gender of Household Head

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Male	411	82.2	84.2	84.2
	Female	77	15.4	15.8	100.0
	Total	488	97.6	100.0	
Missing	System	12	2.4		
Total		500	100.0		

### Marital Status

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Now Married	421	84.2	86.4	86.4
	Widowed	48	9.6	9.9	96.3
	Divorced	8	1.6	1.6	97.9
	Single, Never Married	10	2.0	2.1	100.0
	Total	487	97.4	100.0	
Missing	System	13	2.6		
Total		500	100.0		

### Number of Dependent Children

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	0	415	83.0	89.1	89.1
	1	20	4.0	4.3	93.3
	2	25	5.0	5.4	98.7
	3	3	.6	.6	99.4
	4	2	.4	.4	99.8
	10	1	.2	.2	100.0
	Total	466	93.2	100.0	
Missing	System	34	6.8		
Total		500	100.0		

### Responsibility for Major Financial Decisions

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Male Head of Household	252	50.4	53.2	53.2
	Female Head of Household	52	10.4	11.0	64.1
	Equally Shared	170	34.0	35.9	100.0
	Total	474	94.8	100.0	
Missing	Other	1	.2		
	System	25	5.0		
	Total	26	5.2		
Total		500	100.0		

### Education

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Some high school	3	.6	.6	.6
	High school graduate	26	5.2	5.3	5.9
	Vocational or technical school/apprenticeship	13	2.6	2.7	8.6
	Some college	89	17.8	18.2	26.8
	College graduate	139	27.8	28.5	55.3
	Some graduate school	51	10.2	10.5	65.8
	Master's degree	94	18.8	19.3	85.0
	Law school graduate	18	3.6	3.7	88.7
	Dental/medical school graduate	22	4.4	4.5	93.2
	Doctorate	33	6.6	6.8	100.0
	Total	488	97.6	100.0	
Missing	System	12	2.4		
Total		500	100.0		

### Household Head Retirement Status

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Retired	350	70.0	71.9	71.9
	Semi-Retired	49	9.8	10.1	81.9
	Not Retired	88	17.6	18.1	100.0
	Total	487	97.4	100.0	
Missing	System	13	2.6		
Total		500	100.0		

### Recorded Age

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	27 to 57 Years	56	11.2	11.6	11.6
	58 to 68 Years	127	25.4	26.4	38.0
	69 to 75 Years	165	33.0	34.3	72.3
	76 to 90 Years	133	26.6	27.7	100.0
	Total	481	96.2	100.0	
Missing	System	19	3.8		
Total		500	100.0		

### Recorded Marital Status

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Now Married	421	84.2	86.4	86.4
	Now Not Married	66	13.2	13.6	100.0
	Total	487	97.4	100.0	
Missing	System	13	2.6		
Total		500	100.0		

### Recorded Number of Dependent Children

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	One	20	4.0	39.2	39.2
	Two	25	5.0	49.0	88.2
	Three or More	6	1.2	11.8	100.0
	Total	51	10.2	100.0	
Missing	System	449	89.8		
Total		500	100.0		

### Recoded Education

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No College	42	8.4	8.6	8.6
	Some College	89	17.8	18.2	26.8
	College Graduate	139	27.8	28.5	55.3
	Some Graduate School	51	10.2	10.5	65.8
	Master's Degree	94	18.8	19.3	85.0
	Professional Degree	73	14.6	15.0	100.0
	Total	488	97.6	100.0	
Missing	System	12	2.4		
Total		500	100.0		

### Recoded Advantage of Primary Provider

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Small Advantage	249	49.8	53.9	53.9
	Big Advantage	213	42.6	46.1	100.0
	Total	462	92.4	100.0	
Missing	System	38	7.6		
Total		500	100.0		

### Recoded Overall Satisfaction

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Low Satisfaction	177	35.4	39.2	39.2
	Medium Satisfaction	162	32.4	35.9	75.2
	High Satisfaction	112	22.4	24.8	100.0
	Total	451	90.2	100.0	
Missing	System	49	9.8		
Total		500	100.0		