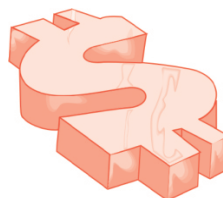


# Section 7: Financial

2009 Product Questionnaire (85-1 to 85-4)



## Banking and Financial Services

Main banking/others sometimes

**brands: institutions**

Services

- children's package
- electronic banking package
- financial planning/advice<sup>1</sup>
- flat fee package
- pre-authorized bill payment
- private banking
- seniors package
- small office/home office package
- student package

Debit/bank cards<sup>1</sup>

personally have

*used for:* cash withdrawals, deposits, make a purchase, pay bills

Telephone/Internet banking

personally used

*used for:* account queries, credit card application, insurance information, interest rate information, investment information, loan (application, information), mortgage (application, information), paying bills, purchasing insurance, purchasing investments, RSP contributions, transferring funds

**brands: institutions**

Loan/line of credit

*types:* home equity (line of credit, loan), personal line of credit, personal loan (auto, other), overdraft protection, student line of credit, student loan (government, bank), home improvement plan,

Mortgages

*types:* principal residence, other real estate, reverse

**brands: institutions**

Credit cards

# currently owned

amount spent

usually pay: minimum amount, partial payment, full amount, none

**brands: card name, card issued by, monthly amount**

Donations

Canadian charities

\$ amount

*types:* alumni, cultural, educational, environmental, hospital foundations, political, religious

*organizations:* Alzheimer Society, Arthritis Society, Big Brothers/Sisters, Cancer Society, Children's Wish, Diabetes Association, Easter Seals, Heart & Stroke, Kidney Foundation, Osteoporosis Society, Salvation Army, Sharelife, United Jewish Appeal, United Way

International relief/development

\$ amount

(continued)

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<sup>1</sup> = new data

(included on the PMB 2010 2-year Readership Database and PMB 2010 1-year Product Database)

new brands are included on the PMB 2010 1-year Product Database

# Section 7: Financial

2009 Product Questionnaire (85-1 to 85-4)



## Income tax returns

filed past 12 months

*method of filing:* mailed return, e-file, netfile, telefile

*types:* discounted return, regular, (cash back, cheque by CCRA), debit card, direct deposit (electronically)

**brands: who prepared return**

## Insurance

Life insurance

*types:* critical illness, long term care, term, universal, whole life

*kinds:* group life, personal life

\$ value of personal life insurance

acquired through: agent/broker, bank/trust company, credit card offer, financial planner, insurance company, Internet, place of employment, professional/alumni association, full service/discount broker

**brands: companies**

Homeowners/personal property insurance

*types:* home, condo, personal property/contents, vacation property

*acquired through:* agent/broker, bank/trust company, insurance company, professional/alumni association,

Private health insurance

## Mutual Funds

*method:* in person, by phone, Internet

*types:* within RRSP, outside RRSP

*types:* Balanced/Asset Allocation, Canadian bond, Canadian equity, Dividend, Energy, Environmental, Guaranteed investment, Income, Index, International bond, International equity, Money market, Mortgage, Precious metals, Segregated funds, Science & technology, Socially responsible, Specialty equity, T-bill, Wrap-Fund of Funds<sup>1</sup>

**brands: institutions**

## Non-RRSP Investments

*institutions used:*

bank, Caisse Populaire, credit union, direct mutual fund company, discount broker, finance company, financial planner, full service broker, life insurance company, trust company

*kinds:* Canada Savings Bonds, collectibles, common/preferred stock, company pension, corporate bonds, ESOP, GIC's, investment real estate, precious metals, RESP, RRIF/annuity, term deposits, treasury bills, segregated funds, Quebec Savings Bonds, other provincial bonds

Stocks/bonds (# transactions)

Securities & savings (total value)

(continued)

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<sup>1</sup> = new data

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new brands are included on the PMB 2010 1-year Product Database

# Section 7: Financial

2009 Product Questionnaire (85-1 to 85-4)



## RRSP Investments

*kinds:* self-directed, other

*institutions used :*

bank, Caisse Populaire, credit union, direct mutual fund company, discount broker, finance company, financial planner, full service broker, life insurance company, trust company

*investments:* Canada Savings Bonds, other savings bonds, common or preferred stock, GIC's, labour funds, strip or coupon bonds, segregated funds, term deposits

when contributed: monthly, once-a-year

\$ contributed, average year

## Wills/estate planning

Have will

*kinds:* including trust

*prepared by:* bank/trust company, lawyer, financial advisor, life insurance agent/broker, self

*updated:* over 2 years ago, past 2 years

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1 = new data

(included on the PMB 2010 2-year Readership Database and PMB 2010 1-year Product Database)

new brands are included on the PMB 2010 1-year Product Database