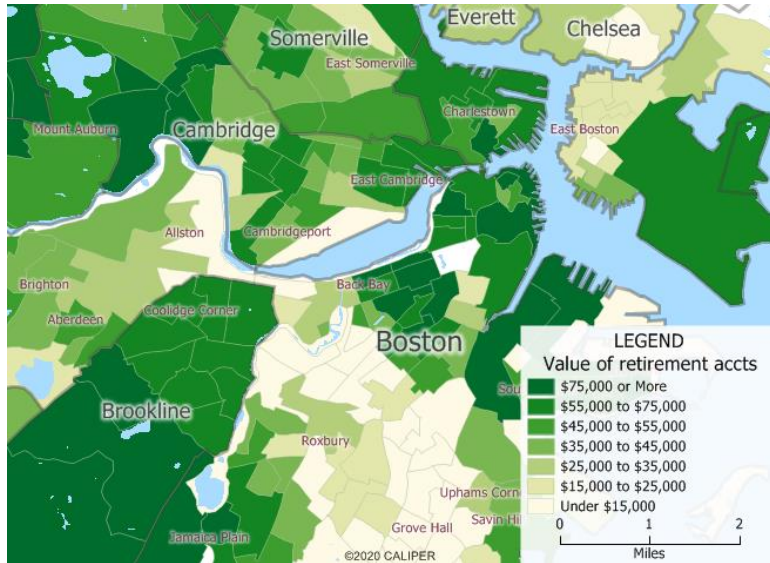


Caliper Financial Assets Data

The Financial Assets Data layer contains per-capita estimates of financial asset holdings. This layer can provide a more accurate depiction of where wealth in the United States resides when used in conjunction with metrics such as household income and expenditure.

An area layer of the Financial Assets Data is downloadable for free for users of the latest version of Maptitude. Don't have the latest version of Maptitude? [Purchase or upgrade to the latest version of Maptitude to use this premium data.](#)

The Financial Assets Data layer is essential for any organization that frequently references demographics such as household income, home value, household expenses, or any other wealth-related statistic. Financial Asset can be used:



- To select a new site for a facility or franchise
- To analyze the financial background of your current customers
- To plan for future expansions of your business to new areas
- To create territories balanced on personal asset value
- To structure advertising campaigns and better target potential customers

[Download the Financial Assets Layer](#)
(Most recent version of Maptitude required)

[Buy/Upgrade Maptitude](#)
(Required to download the Financial Assets Layer)

REQUIREMENTS: Requires the most recent version of Maptitude and USA Country Package.

USING THE LAYER: You can add the layer to a map by choosing **Map > Layers**, clicking **Add Layer**, and choosing ccFinancialAssets.CDF from the install folder (typically c:\ccdata\Financial Assets\).

ABOUT THE DOWNLOAD: The install codes and instructions for downloading are emailed after the shipping confirmation email. Download orders received after 3pm are usually processed the same business day, but may be processed on the next business day, excluding US federal holidays.



Downloading the Free Financial Assets Layer for Maptitude

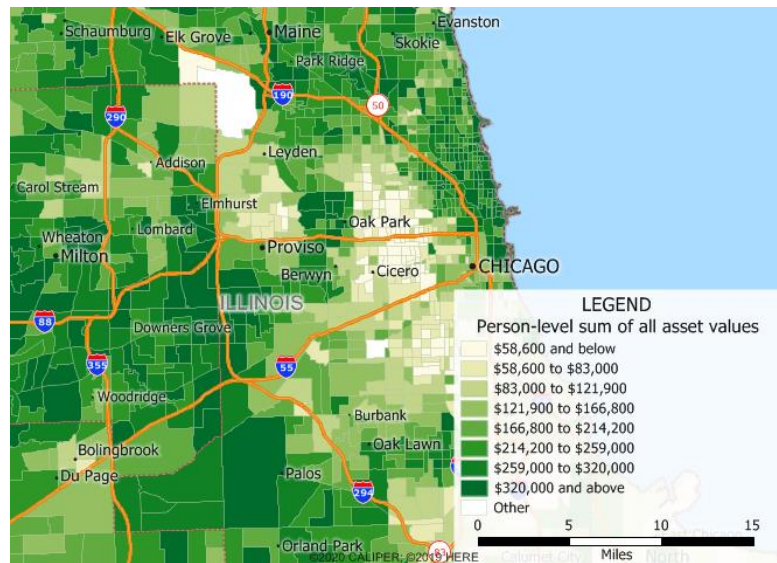
The Financial Assets map layer for Maptitude is accessible as a free download. In this tech tip we describe how to install the layer and add it to a map.

1. Download the data from the Caliper Store. NOTE: you must have the most recent version of Maptitude in order to download the layers.
2. Once the files are downloaded, click **OK**, then click **Install**, and follow the prompts.
3. To add the layer to a Maptitude map, open the map, choose **Map>Layers**, and click **Add Layer** in the Layers dialog box.
4. Browse for the folder where the downloaded data are located (e.g., c:\ccddata). Within this folder will be a subfolder, Financial Assets. Choose CCFINANCIALASSETS.CDF from this folder and click **Open** in the File Open dialog box.
5. Maptitude adds the layer to the map. Close the layers dialog box to see the layer on the map.

Visualizing Asset Data in a Region


The easiest way to visualize how possession of an asset varies by area is to create a thematic map. In this example, we use a color theme to show the sum of all asset values in the Chicago area.

1. Choose **Edit>Find** or click  on the Standard Toolbar, select **U.S. City** from the left column, enter Chicago, IL, and click **OK** to pan the map to Chicago.
2. Right-click the Financial Assets layer and choose **Make Working Layer**.
3. Choose **Map>Thematic Mapping>Color** or click  on the Standard toolbar.
4. From the Field drop-down, choose **[Person-level sum of all asset values]** and click **OK**.

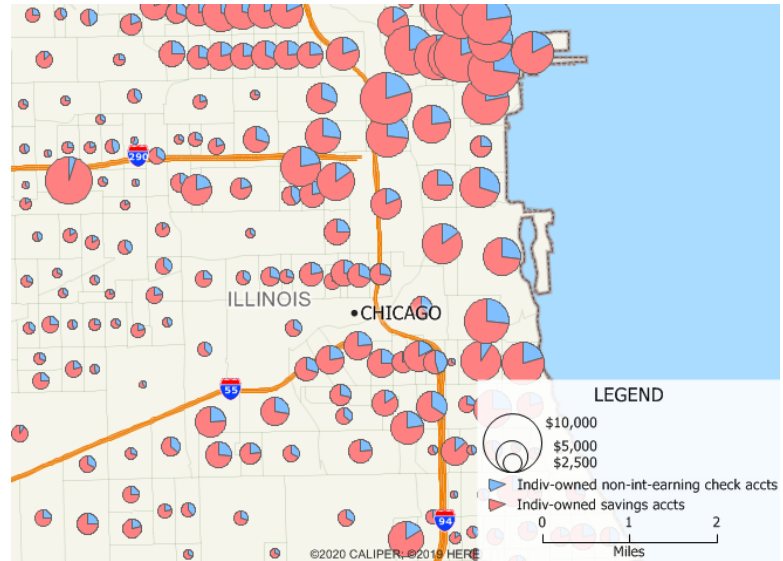


The resulting map shows how the per-capita sum of all asset values ranges throughout the region.

Alternatively, Chart Themes can be used to compare the ownerships of multiple assets across an area.

5. Right-click the Financial Assets layer and choose **Make Working Layer**.
6. Choose **Map>Thematic Mapping>Chart** or click  on the Standard toolbar.


7. Choose two or more assets to compare. For example, we could compare balances of checking and savings accounts by selecting **[Value of individually owned regular (non-interest earning) checking accounts]** and **[Value of individually owned savings accounts]**.
8. Click **OK**.



Maptitude displays a chart map comparing the chosen assets.

Finding Aggregate Asset Values

It may also be helpful to visualize and extract a particular asset value as an aggregate rather than at an individual level. The steps below cover creating an aggregate field for educational debt in each Census Tract.

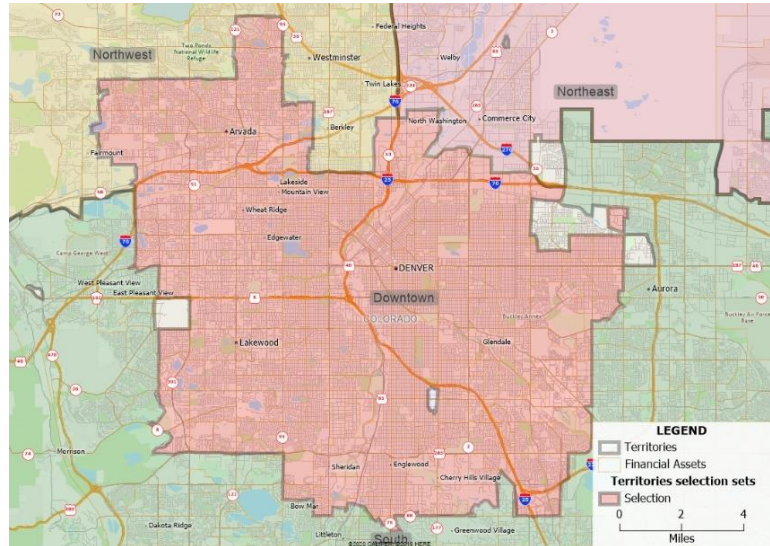
1. Right-click on the Financial Assets layer and choose **New Dataview**.
2. Choose **Dataview > Formula Fields** or click  on the Standard toolbar.
 - a. Enter the formula **[Amount of student loans or educational expenses owed in own name only] * Population**.
 - b. In the Formula Fields box, type **Aggregate Edu Debt**. This will be the name for the formula field.
 - c. Click **OK** to save the formula.
3. Next, we will update the format for this formula field. Scroll to the right end of the Dataview, right click on the Aggregate Edu Debt field, and choose **Field Properties**.
 - a. Scroll to the bottom of the list of fields and change the Format for [Aggregate Edu Debt] to **\$12,345.12**.
 - b. Click **OK**. The Aggregate Edu Debt formula field now has a currency format.

This formula field can be used in thematic maps, overlays, labels, and more.

Finding Asset Values in an Area or Territory

Often, you may need to find the person-level average asset value for a custom area such as a territory. In this example, we use the Overlay tool to find an estimated average asset breakdown for one or more territories.

1. Open a map containing a territory layer and the Financial Assets layer. For steps on creating a territory layer, you can check out the guide [here](#).
2. Right click on the Territories layer and choose **Make Working Layer**.
3. Choose **Tools>Analysis>Overlay**.
 - a. From the Overlay drop-down, choose **All Features**.
 - b. In the With section, choose **Financial Assets** from the Layer drop-down and **All Features** from the Include drop-down. Uncheck **Count the number of features**.
 - c. If you would like to see a PDF report, check the **Create a Report** box.
 - d. Click **OK**.



Maptitude calculates the overlay for the territories and displays the results in a Dataview. If you selected **Create a Report**, a PDF report will also display. The contents of the Dataview can be exported to Excel by choosing **File>Export>Table** and selecting **.xlsx** as the file type.

Caliper Financial Assets Data

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