

ABSTRACT

This report aims to support the U.S. Department of Labor (DOL) with tabulations of asset holdings and investment patterns of households in the United States. It is organized in two parts. Part I contains a summary of publicly available data sources with measures of holdings of 401(k) and other defined contribution (DC) plans, individual retirement accounts (IRAs), and after-tax investment accounts. The primary focus is on the Survey of Consumer Finances and the Survey of Income and Program Participation. Part II contains tabulations and analyses based on the Survey of Consumer Finances of 2013. It documents differences among owners of IRAs, 401(k) and other DC plans, and after-tax investment accounts.