IA1PRE IA1PRE NOT ON FILE

> The next few questions are about the different types of income people may receive. We don't need to know the amount from each source.
>
> Your responses can help us understand how people manage financially as they age.
>
> Please feel free to refer to any records or other persons that may be of assistance in answering these questions.
>
> Many of these questions ask about "last month." By last month, I mean in {CURRENT MONTH – 1}.
>
> PRESS 1 AND ENTER TO CONTINUE

IA1

ia3recsspa1	R3 IA1 SP REC SOCIAL SECURITY
ia3recsspa2	R3 IA1 SPOUSE PART REC SOC SEC
ia3recsspa3	R3 IA1 NO SOC SECURTY PAYMNT REC

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display you".

Otherwise, display "SP".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".

Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE".
Display "in the last month" in underlined text.

QUESTION TEXT:

> Did {you/SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive Social Security retirement and/or Railroad Retirement payments in the last month (that is in {CURRENT MONTH – 1})?
>
> {SELECT ALL THAT APPLY}

CODES	Code All That Apply
1	YES, SP RECEIVED PAYMENT FROM SOURCE
2	YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE
3	NO PAYMENT RECEIVED FROM THIS SOURCE
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.
If 3 (NO PAYMENT) selected and [1 (SP PAYMENT) or 2 (SPOUSE PAYMENT)] is selected, display error message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

IA4	ia3recssils1	R3 IA4 SP RECEIVD SSI LAST MONTH
	ia3recssils2	R3 IA4 SPOUSE PRT REC SSI LST MO
	ia3recssils3	R3 IA4 NO SSI RECEIVD LAST MONTH

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE".
Display "last month" in underlined text.

QUESTION TEXT:

Did {you/SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive Supplemental Security Income, which is also called SSI, last month?

IF NEEDED: These are monthly government payments to lower-income people in need.

{SELECT ALL THAT APPLY}

CODES	Code All That Apply
1	YES, SP RECEIVED PAYMENT FROM SOURCE
2	YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE
3	NO PAYMENT RECEIVED FROM THIS SOURCE
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.
If 3 (NO PAYMENT) selected and [1 (SP PAYMENT) or 2 (SPOUSE PAYMENT)] is selected, display error message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

IA5	ia3rvapayls1	R3 IA5 SP REC PAY FRM VA LAST MO
	ia3rvapayls2	R3 IA5 SPOUS PA REC VA PAY LSTMO
	ia3rvapayls3	R3 IA5 NO VA PAY REC LAST MONTH

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".

Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display
"SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER RECEIVED PAYMENT
FROM SOURCE".

Display "last month" in underlined text.

QUESTION TEXT:

Did {you/SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive
any payments from the Veteran's Administration (U.S. Department of Veterans Affairs) last month
related to military service or veteran survivor's benefits?

{SELECT ALL THAT APPLY}

CODES	Code All That Apply
1	YES, SP RECEIVED PAYMENT FROM SOURCE
2	YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE
3	NO PAYMENT RECEIVED FROM THIS SOURCE
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.
If 3 (NO PAYMENT) selected and [1 (SP PAYMENT) or 2 (SPOUSE PAYMENT)] is selected, display error
message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when
leaving the screen.

IA6PRE	**IA6PRE**	NOT ON FILE

People sometimes have other retirement income. This may be from pensions or retirement plans related
to their jobs.

PRESS 1 AND ENTER TO CONTINUE

IA6	**ia3penjobou1**	R3 IA6 SP HAS PENSION PLAN
	ia3penjobou2	R3 IA6 SPOUSE HAS PENSION PLAN
	ia3penjobou3	R3 IA6 NO PENSION PLAN

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you".
Otherwise, display "Does SP".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display
"or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display
"SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER HAS PENSION".

QUESTION TEXT:

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} have
any pension plans that were a job-related or union benefit?

IF NEEDED: These plans often require that a person work for a certain number of years before they qualify or "are vested" in the pension plan.

{SELECT ALL THAT APPLY}

CODES	Code All That Apply
1	YES, SP HAS PENSION
2	YES, SPOUSE/PARTNER HAS PENSION
3	NO PENSIONS
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.
If 3 (NO PENSIONS) selected and [1 (SP PENSION) or 2 (SPOUSE PENSION)] is selected, display error message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

IA7	ia3iraothac1	R3 IA7 SP HAS IRA OTH RETIRE ACC
	ia3iraothac2	R3 IA7 SPOUSE HAS IRA OTHR ACC
	ia3iraothac3	R3 IA7 NO IRA OTHR RETIRE ACCT

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you". Otherwise, display "Does SP".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER HAS 401K, 403B, IRA, OR KEOGH".

QUESTION TEXT:

SHOW CARD IA1

Please look at the types of retirement plans on this card. {Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} have any of these retirement accounts?

IF NEEDED: 401Ks and 403Bs are plans where you contribute an amount each month from your paycheck, and your employer may match some of your contribution.

IF NEEDED: IRAs (Individual Retirement Accounts) and Keoghs are plans you set up on your own.

{SELECT ALL THAT APPLY}

CODES	Code All That Apply
1	YES, SP HAS 401K, 403B, IRA, OR KEOGH
2	YES, SPOUSE/PARTNER HAS 401K, 403B, IRA, OR KEOGH
3	NO ACCOUNTS OF THIS TYPE
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.
If 3 (NO ACCT) selected and [1 (SP ACCT) or 2 (SPOUSE ACCT)] is selected, display error message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

IA8	ia3mutfdstk1	R3 IA8 SP OWNS MUTUAL FUND STOCK
	ia3mutfdstk2	R3 IA8 SPOUSE OWNS FUNDS STOCK
	ia3mutfdstk3	R3 IA8 SP SPOUSE OWN FUNDS STOCK
	ia3mutfdstk4	R3 IA8 NO FUNDS OR STOCK OWNED

DISPLAY INSTRUCTIONS:

If IA7 = 1 (SP RETIREMENT ACCT) or 2 (SPOUSE RETIREMENT ACCT), display "Not including the retirement accounts we have already talked about, {do you/does SP}".
Otherwise, display "Do you/Does SP".

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you" or "do you".
Otherwise, display "Does SP" or "does SP".
If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY".

QUESTION TEXT:

{Not including the retirement accounts we have already talked about, {do you/does SP}/{Do you/Does SP}} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} own any mutual funds or stocks?

{SELECT ALL THAT APPLY}

CODES	Code All That Apply
1	YES, SP HAS ASSET
2	YES, SPOUSE/PARTNER HAS ASSET
3	YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY
4	NO ASSET OF THIS TYPE
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.
If 4 (NO ASSET) selected and [1 (SP ASSET), 2 (SPOUSE ASSET), or 3 (JOINT ASSET)] is selected, display error message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

IA9	ia3ownbond1	R3 IA9 SP OWNS BONDS
	ia3ownbond2	R3 IA9 SPOUSE OWNS BONDS
	ia3ownbond3	R3 IA9 SP SPOUSE OWN BONDS

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "do you".
Otherwise, display "does SP".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY".

QUESTION TEXT:

Not including what we've already talked about, {do you/does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} own any bonds, such as Government Savings Bonds, corporate, municipal, or other types of bonds?

{SELECT ALL THAT APPLY}

CODES	Code All That Apply
1	YES, SP HAS ASSET
2	YES, SPOUSE/PARTNER HAS ASSET
3	YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY
4	NO ASSET OF THIS TYPE
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.
If 4 (NO ASSET) selected and [1 (SP ASSET), 2 (SPOUSE ASSET), or 3 (JOINT ASSET)] is selected, display error message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

IA10PRE   **IA10PRE**   NOT ON FILE

The next questions ask about different kinds of bank or savings accounts people sometimes have or property they own.

PRESS 1 AND ENTER TO CONTINUE

IA10

	ia3bnkacccd1	R3 IA10 SP OWNS CHECK ACCT
	ia3bnkacccd2	R3 IA10 SPOUSE OWNS CHECK ACCT
	ia3bnkacccd3	R3 IA10 SP SPOUSE OWN CHECK ACCT
	ia3bnkacccd4	R3 IA10 NO CHECK ACCT OWNED
	ia3bnkacccd5	R3 IA10 SP OWNS SAVINGS ACCT
	ia3bnkacccd6	R3 IA10 SPOUSE OWNS SAVING ACCT
	ia3bnkacccd7	R3 IA10 SP SPOUSE OWN SAVNG ACT

ia3bnkacccd8	R3 IA10 NO SAVINGS ACCT OWNED
ia3bnkacccd9	R3 IA10 SP OWNS CDS
ia3bnkacccd10	R3 IA10 SPOUSE OWNS CDS
ia3bnkacccd11	R3 IA10 SP SPOUSE OWN CDS
ia3bnkacccd12	R3 IA10 NO CDS OWNED

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "do you".
Otherwise, display "does SP".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY".

QUESTION TEXT:

Not counting what we've already talked about, {do you/does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} have any of the following types of accounts?

RESPONSE [1] a. A checking account?
RESPONSE [2] b. A savings account or money market account?
RESPONSE [3] c. Certificates of deposit?

{SELECT ALL THAT APPLY}

CODES	Code All That Apply
1	YES, SP HAS ASSET
2	YES, SPOUSE/PARTNER HAS ASSET
3	YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY
4	NO ASSETS OF THIS TYPE
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.
If 4 (NO ASSETS) selected and [1 (SP ASSET), 2 (SPOUSE ASSET), or 3 (JOINT ASSET)] is selected, display error message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

IA13	**ia3realestt1**	R3 IA13 SP OWNS REAL ESTATE
	ia3realestt2	R3 IA13 SPOUSE OWNS REAL ESTATE
	ia3realestt3	R3 IA13 SP SPOUSE OWN REAL ESTTE
	ia3realestt4	R3 IA13 NO REAL ESTATE OWNED

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "do you".
Otherwise, display "does SP".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display

"or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display
"SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER HAS ASSET" and
3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY".

If HP1 = 1 (OWNS HOME), display "besides {your/SP}'s home".

QUESTION TEXT:

> {Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} own
> a business, a farm, or any other real estate {besides {SP's} home}, including land or rental properties?
>
> {SELECT ALL THAT APPLY}

CODES	Code All That Apply
1	YES, SP HAS ASSET
2	YES, SPOUSE/PARTNER HAS ASSET
3	YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY
4	NO ASSETS OF THIS TYPE
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:
Allow code all that apply.
If 4 (NO ASSETS) selected and [1 (SP ASSET), 2 (SPOUSE ASSET), or 3 (JOINT ASSET)] is selected, display error message "INCONSISTENT ANSWER. 'NO' CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

IA50	**ia3totincjt**	R3 IA50 JOINT TOTAL INCOME
	ia3toincimjf	R3 F IMPUTED JOINT TOTAL INC FLG
	ia3toincimj1	R3 IA50 IMPUTED JOINT TOTAL INC1
	ia3toincimj2	R3 IA50 IMPUTED JOINT TOTAL INC2
	ia3toincimj3	R3 IA50 IMPUTED JOINT TOTAL INC3
	ia3toincimj4	R3 IA50 IMPUTED JOINT TOTAL INC4
	ia3toincimj5	R3 IA50 IMPUTED JOINT TOTAL INC5

DISPLAY INSTRUCTIONS:
If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "SP's".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER),
display "and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If IA1 = 1 (SP SS/RR) or 2 (SPOUSE SS/RR), display "Social Security or Railroad Retirement".
If IA4 = 1 (SP SSI) or 2 (SPOUSE SSI), display "Supplemental Security Income".
If IA5 = 1 (SP VA) or 2 (SPOUSE VA), display "the Veteran's Administration".
If IA6 = 1 (SP PENSION) or 2 (SPOUSE PENSION), display "a pension plan".
If IA7 = 1 (SP RETIREMENT ACCT) or 2 (SPOUSE RETIREMENT ACCT), display "any retirement accounts".
If IA8 = 1 (SP MUTUAL FUNDS), 2 (SPOUSE MUTUAL FUNDS) or 3 (JOINT MUTUAL FUNDS), display "mutual

funds or stocks".
If IA9 = 1 (SP BONDS), 2 (SPOUSE BONDS) or 3 (JOINT BONDS), display "bonds".
If IA10a = 1 (SP CHECKING), 2 (SPOUSE CHECKING) or 3 (JOINT CHECKING) or IA10b = 1 (SP SAVINGS), 2 (SPOUSE SAVINGS) or 3 (JOINT SAVINGS), display "bank accounts".
If IA10c = 1 (SP CDS), 2 (SPOUSE CDS) or 3 (JOINT CDS), display "CDs".
If IA13 = 1 (SP REAL ESTATE), 2 (SPOUSE REAL ESTATE) or 3 (JOINT REAL ESTATE), display "business, farm, or real estate".
If LF1 = 1 (SP WORK LAST WEEK) or LF2 = 1 (SP HAD JOB LAST WEEK) or LF3 = 1 (SP WORK LAST MONTH) or LF13 = 1 (SPOUSE WORK LAST MONTH), display "jobs".

If more than one income source displayed, display "and" between each one.

Display "last year" in underlined text.

QUESTION TEXT:

Now I want to ask about {your/SP's} {and SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} total income for last year, that is, for the calendar year ending in December {CURRENT YEAR - 1} before any federal or state taxes were taken out.

Now think about that total income from:
{Social Security or Railroad Retirement} {Supplemental Security Income}
{the Veteran's Administration}
{a pension plan} {any retirement accounts}
{mutual funds or stocks} {bonds}
{bank accounts} {CDs} {business, farm or real estate}
{jobs} and from any other sources.

How much was {your/SP's} {and SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} total income before taxes for last year (this is, for the 12 months ending in December {CURRENT YEAR - 1})?

IF NEEDED: We don't need an exact dollar amount – the nearest $1,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER TOTAL INCOME FOR LAST YEAR [SECTION EW]

ENTER NUMBER

Range	1 to 99999999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: $1-$99,999,999
Do not display the phrase 'Enter Number'.
If IA50 = 1-99,999,999, go to Section EW.

BOX IA51a   **BOXIA51a**   NOT ON FILE

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), go to IA51a.
Otherwise, go to IA51b.

IA51a   **ia3toincesjt**   R3 IA51A JOINT EST TOT INCOME

ia3eincimjf   R3 F IMPTD JOINT EST TOT INC FLG

ia3eincimj1	R3 IA51A IMP EST JOINT TOT INC1	
ia3eincimj2	R3 IA51A IMP EST JOINT TOT INC2	
ia3eincimj3	R3 IA51A IMP EST JOINT TOT INC3	
ia3eincimj4	R3 IA51A IMP EST JOINT TOT INC4	
ia3eincimj5	R3 IA51A IMP EST JOINT TOT INC5	

DISPLAY INSTRUCTIONS:
> If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
> Otherwise, display "SP's".
> If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".
> If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
> Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".
> Display "last year" in underlined text.

QUESTION TEXT:

> SHOW CARD IA2
>
> Please look at this card and tell me which category is closest to {your/SP's} {and SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} total income before taxes for last year (that is, for the 12 months ending in December {CURRENT YEAR - 1})?

CODES

1	less than $27,600,	SECTION EW
2	$27,600-$41,999,	SECTION EW
3	$42,000-$63,999,	SECTION EW
4	$64,000-$107,999 or	SECTION EW
5	$108,000 or more?	SECTION EW
	REFUSED	SECTION EW
	DON'T KNOW	SECTION EW

IA51B			
	ia3toincessg	R3 IA51B SINGLE EST TOT INC	
	ia3eincimsf	R3 F IMPUTED SGL EST TOT INC FLG	
	ia3eincims1	R3 IA51B IMP EST SP SGL TOT INC1	
	ia3eincims2	R3 IA51B IMP EST SP SGL TOT INC2	
	ia3eincims3	R3 IA51B IMP EST SP SGL TOT INC3	
	ia3eincims4	R3 IA51B IMP EST SP SGL TOT INC4	
	ia3eincims5	R3 IA51B IMP EST SP SGL TOT INC5	

DISPLAY INSTRUCTIONS:
> If PROXY flag <> 1 (YES), display "your".
> Otherwise, display "SP's".
> Display "last year" in underlined text.

QUESTION TEXT:

> SHOW CARD IA3
>
> Please look at this card and tell me which category best fits {your/SP's} total income before taxes for last year

CODES

1	less than $14,000,
2	$14,000-$21,999,
3	$22,000-$35,999,
4	$36,000-$48,999, or
5	$49,000 or more?
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Go to Section EW – Economic Well-being.