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   ia9recsspa1   R9 IA1 SP REC SOCIAL SECURITY
                        ia9recsspa2   R9 IA1 SPOUSE PART REC SOC SEC
                        ia9recsspa3   R9 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
ia9recssils1	R9 IA4 SP RECEIVD SSI LAST MONTH
ia9recssils2	R9 IA4 SPOUSE PRT REC SSI LST MO
ia9recssils3	R9 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
ia9rvapayls1	R9 IA5 SP REC PAY FRM VA LAST MO
ia9rvapayls2	R9 IA5 SPOUS PA REC VA PAY LSTMO
ia9rvapayls3	R9 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	**ia9penjobou1**	R9 IA6 SP HAS PENSION PLAN
	ia9penjobou2	R9 IA6 SPOUSE HAS PENSION PLAN
	ia9penjobou3	R9 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	**ia9iraothac1**	R9 IA7 SP HAS IRA OTH RETIRE ACC
	ia9iraothac2	R9 IA7 SPOUSE HAS IRA OTHR ACC
	ia9iraothac3	R9 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 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 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 OTHER RETIREMENT PLANS".

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?
>
> 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) are a type of plan you set up on your own.
>
> {SELECT ALL THAT APPLY}

CODES	Code All That Apply
1	YES, SP HAS 401K, 403B, IRA, OR OTHER RETIREMENT PLANS
2	YES, SPOUSE/PARTNER HAS 401K, 403B, IRA, OR OTHER RETIREMENT PLANS
3	NO PLANS
	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	**ia9mutfdstk1**	R9 IA8 SP OWNS MUTUAL FUND STOCK

ia9mutfdstk2	R9 IA8 SPOUSE OWNS FUNDS STOCK	
ia9mutfdstk3	R9 IA8 SP SPOUSE OWN FUNDS STOCK	
ia9mutfdstk4	R9 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	**ia9ownbond1**	R9 IA9 SP OWNS BONDS
	ia9ownbond2	R9 IA9 SPOUSE OWNS BONDS
	ia9ownbond3	R9 IA9 SP SPOUSE OWN BONDS
	ia9ownbond4	R9 IA9 NO BONDS 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 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

ia9bnkacccd1	R9 IA10 SP OWNS CHECK ACCT
ia9bnkacccd2	R9 IA10 SPOUSE OWNS CHECK ACCT
ia9bnkacccd3	R9 IA10 SP SPOUSE OWN CHECK ACCT
ia9bnkacccd4	R9 IA10 NO CHECK ACCT OWNED
ia9bnkacccd5	R9 IA10 SP OWNS SAVINGS ACCT
ia9bnkacccd6	R9 IA10 SPOUSE OWNS SAVING ACCT
ia9bnkacccd7	R9 IA10 SP SPOUSE OWN SAVNG ACT
ia9bnkacccd8	R9 IA10 NO SAVINGS ACCT OWNED
ia9bnkacccd9	R9 IA10 SP OWNS CDS
ia9bnkacccd10	R9 IA10 SPOUSE OWNS CDS
ia9bnkacccd11	R9 IA10 SP SPOUSE OWN CDS
ia9bnkacccd12	R9 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	**ia9realestt1**	R9 IA13 SP OWNS REAL ESTATE
	ia9realestt2	R9 IA13 SPOUSE OWNS REAL ESTATE
	ia9realestt3	R9 IA13 SP SPOUSE OWN REAL ESTTE
	ia9realestt4	R9 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	**ia9totinc**	R9 IA50 TOTAL INCOME
	ia9toincimf	R9 F IMPUTED TOTAL INC FLG
	ia9toincim1	R9 IA50 IMPUTED TOTAL INC1
	ia9toincim2	R9 IA50 IMPUTED TOTAL INC2
	ia9toincim3	R9 IA50 IMPUTED TOTAL INC3
	ia9toincim4	R9 IA50 IMPUTED TOTAL INC4
	ia9toincim5	R9 IA50 IMPUTED TOTAL INC5

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

If 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	0 to 99999999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: $0-$99,999,999.

Do not display the phrase 'Enter Number'.
IF IA50 = 0-99999999, go to Section EW.

BOX IA51a	**BOXIA51a**	NOT ON FILE

If SP MARITAL STATUS =1 (MARRIED) or 2 (LIVING WITH A PARTNER), go to IA51A.
Otherwise, go to IA51B.

IA51a	**ia9toincesjt**	R9 IA51A JOINT EST TOT INCOME
	ia9eincimjf	R9 F IMPTD JOINT EST TOT INC FLG
	ia9eincimj1	R9 IA51A IMP EST JOINT TOT INC1
	ia9eincimj2	R9 IA51A IMP EST JOINT TOT INC2
	ia9eincimj3	R9 IA51A IMP EST JOINT TOT INC3
	ia9eincimj4	R9 IA51A IMP EST JOINT TOT INC4
	ia9eincimj5	R9 IA51A IMP EST JOINT TOT INC5

QUESTION TEXT:

SHOW CARD IA2

Please look at this card and tell me which is closest.

CODES

1	LESS THAN $30,000	SECTION EW
2	$30,000 TO LESS THAN $43,000	SECTION EW
3	$43,000 TO LESS THAN $66,000	SECTION EW
4	$66,000 TO LESS THAN $109,000	SECTION EW
5	$109,000 OR MORE	SECTION EW
	REFUSED	SECTION EW
	DON'T KNOW	SECTION EW

IA51B	**ia9toincessg**	R9 IA51B SINGLE EST TOT INC
	ia9eincimsf	R9 F IMPUTED SGL EST TOT INC FLG
	ia9eincims1	R9 IA51B IMP EST SP SGL TOT INC1
	ia9eincims2	R9 IA51B IMP EST SP SGL TOT INC2
	ia9eincims3	R9 IA51B IMP EST SP SGL TOT INC3
	ia9eincims4	R9 IA51B IMP EST SP SGL TOT INC4
	ia9eincims5	R9 IA51B IMP EST SP SGL TOT INC5

QUESTION TEXT:

SHOW CARD IA3

Please look at this card and tell me which is closest.

CODES

1	LESS THAN $18,000
2	$18,000 TO LESS THAN $22,000
3	$22,000 TO LESS THAN $36,000
4	$$36,000 TO LESS THAN $56,000
5	$56,000 OR MORE
	REFUSED
	DON'T KNOW

PROGRAMMER INSTRUCTIONS:
Go to Section EW – Economic Well-being.