

NHATS Round 5

Section IA [INCOME AND ASSETS]

Sequence: 38

IA1PRE

IA1PRE

NOT ON FILE

We are interested in how people are getting along financially these days. The next few questions are about income and other resources. 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

ia5recsspa1

R5 IA1 SP REC SOCIAL SECURITY

ia5recsspa2

R5 IA1 SPOUSE PART REC SOC SEC

ia5recsspa3

R5 IA1 NO SOC SECURITY PAYMNT REC

DISPLAY INSTRUCTIONS:

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

BOX IA2**BOXIA2**

NOT ON FILE

If IA1 <> 1 (SP PAYMENT), go to IA4.
Otherwise, go to IA2.

IA2**ia5howrecssp**

R5 IA2 HOW REC SOC SEC PAY

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES), display "Do you".
Otherwise, display "Does SP".

QUESTION TEXT:

{Do you/Does SP} get payments by direct deposit, on a prepaid card, or by mail?

CODES

1	MAIL
2	DIRECT DEPOSIT
3	PREPAID CARD
	REFUSED
	DON'T KNOW

IA3A**ia5msrtrecss**

R5 IA3A MTH STRD REC SOC SEC PAY

DISPLAY INSTRUCTIONS:

Display “MONTH” in underlined text”.

QUESTION TEXT:

What month and year did {you/SP} start receiving Social Security?

ENTER MONTH

ENTER NUMBER

Range	1 to 12
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Do not display the phrase 'Enter Number'.

IA3B**ia5yrstrecss**

R5 IA3B YR STRTD REC SOC SEC PAY

DISPLAY INSTRUCTIONS:

Display “YEAR” in underlined text”.

QUESTION TEXT:

[What month and year did {you/SP} start receiving Social Security?]

ENTER YEAR

ENTER NUMBER

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: {CURRENT YEAR - 45} - {CURRENT YEAR}.
Do not display the phrase 'Enter Number'.

IA4	ia5recssils1	R5 IA4 SP RECEIVD SSI LAST MONTH
	ia5recssils2	R5 IA4 SPOUSE PRT REC SSI LST MO
	ia5recssils3	R5 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 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 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	ia5rvapayls1	R5 IA5 SP REC PAY FRM VA LAST MO
	ia5rvapayls2	R5 IA5 SPOUS PA REC VA PAY LSTMO
	ia5rvapayls3	R5 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 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 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

ia5penjobou1

R5 IA6 SP HAS PENSION PLAN

ia5penjobou2

R5 IA6 SPOUSE HAS PENSION PLAN

ia5penjobou3

R5 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 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 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 PENSION REFUSED DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.
If 3 (NO PENSION) 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	ia5iraothac1	R5 IA7 SP HAS IRA OTH RETIRE ACC
	ia5iraothac2	R5 IA7 SPOUSE HAS IRA OTHR ACC
	ia5iraothac3	R5 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	ia5mutfdstk1	R5 IA8 SP OWNS MUTUAL FUND STOCK
	ia5mutfdstk2	R5 IA8 SPOUSE OWNS FUNDS STOCK
	ia5mutfdstk3	R5 IA8 SP SPOUSE OWN FUNDS STOCK
	ia5mutfdstk4	R5 IA8 NO FUNDS OR STOCK OWNED

DISPLAY INSTRUCTIONS:

If IA7 = 1 (SP RETIREMENT PLAN) 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 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 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	ia5ownbond1	R5 IA9 SP OWNS BONDS
	ia5ownbond2	R5 IA9 SPOUSE OWNS BONDS
	ia5ownbond3	R5 IA9 SP SPOUSE OWN BONDS
	ia5ownbond4	R5 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 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 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
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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	ia5bnkaccdd1	R5 IA10 SP OWNS CHECK ACCT
	ia5bnkaccdd2	R5 IA10 SPOUSE OWNS CHECK ACCT

ia5bnkacccd3	R5 IA10 SP SPOUSE OWN CHECK ACCT
ia5bnkacccd4	R5 IA10 NO CHECK ACCT OWNED
ia5bnkacccd5	R5 IA10 SP OWNS SAVINGS ACCT
ia5bnkacccd6	R5 IA10 SPOUSE OWNS SAVING ACCT
ia5bnkacccd7	R5 IA10 SP SPOUSE OWN SAVNG ACT
ia5bnkacccd8	R5 IA10 NO SAVINGS ACCT OWNED
ia5bnkacccd9	R5 IA10 SP OWNS CDS
ia5bnkacccc10	R5 IA10 SPOUSE OWNS CDS
ia5bnkacccc11	R5 IA10 SP SPOUSE OWN CDS
ia5bnkacccc12	R5 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 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 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 ...
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	ia5realestt1	R5 IA13 SP OWNS REAL ESTATE
	ia5realestt2	R5 IA13 SPOUSE OWNS REAL ESTATE
	ia5realestt3	R5 IA13 SP SPOUSE OWN REAL ESTTE

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 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 {your/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.

IA14PRE**IA14PRE**

NOT ON FILE

We now have a few questions which are important for understanding how people manage
financially as they age.

PRESS 1 AND ENTER TO CONTINUE

BOX IA14**BOXIA14**

NOT ON FILE

If IA1 = 1 (SP RECEIVED SS/RR) and 2 (SPOUSE RECEIVED SS/RR), go to IA14.

Else if IA1 = 1 (SP RECEIVED SS/RR), go to IA15A.

Else if IA1 = 2 (SPOUSE RECEIVED SS/RR), go to IA16A.

Otherwise, go to BOX IA17.

IA14**ia5ssrrpymnt**

R5 IA14 RECENT MTHLY SS RR PYMNT

DISPLAY INSTRUCTIONS:

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

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

QUESTION TEXT:

First, what was the amount of {your/SP's} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s most recent monthly Social Security or Railroad Retirement payment (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

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.

CODES

- 1 ENTER COMBINED AMOUNT
- 2 ENTER SP AND SPOUSE/PARTNER AMOUNTS IA15A
SEPARATELY
- REFUSED IA14B
- DON'T KNOW IA14B

IA14A

ia5srrjtamt

R5 IA14A JOINT SS RR AMOUNT

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT

ENTER NUMBER

Range

1 to 9999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999
Do not display the phrase 'Enter Number'.
If IA14A = 1-9999, go to BOX IA17

IA14B

ia5srrjttest

R5 IA14B ESTMT JOINT SSRR AMOUNT

QUESTION TEXT:

SHOW CARD IA2

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

CODES

- 1 LESS THAN \$1,300, BOX IA17
- 2 \$1,300 TO LESS THAN \$1,700 BOX IA17
- 3 \$1,700 TO LESS THAN \$2,200 BOX IA17
- 4 \$2,200 TO LESS THAN \$2,600 BOX IA17
- 5 \$2,600 OR MORE? BOX IA17

REFUSED
DON'T KNOW

BOX IA17
BOX IA17

IA15A

ia5ssrrspamt

R5 IA15A SP SS RR AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY flag <>1 (YES), display "your".
Otherwise, display "SP's".

QUESTION TEXT:

What was the amount of {your/SP's} most recent monthly Social Security or Railroad Retirement payment (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

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 SP SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT

ENTER NUMBER

Range 1 to 9999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999
Do not display the phrase 'Enter Number'.
If IA15A = 1-9999, go to BOX IA16A

IA15B

ia5ssrrspest

R5 IA15B ESTIMATE SP SS RR AMT

QUESTION TEXT:

SHOW CARD IA3

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

CODES

1 LESS THAN \$700,
2 \$700 TO LESS THAN \$1,000
3 \$1,000 TO LESS THAN \$1,300
4 \$1,300 TO LESS THAN \$1,600
5 \$1,600 OR MORE
REFUSED
DON'T KNOW

BOX IA16A

BOXIA16A

NOT ON FILE

If IA14 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA16A.
Otherwise, go to BOX IA17.

IA16A

ia5ssrrptamt

R5 IA16A PARTNER SS RR AMT

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".

QUESTION TEXT:

What was the amount of {your/{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} most recent monthly Social Security or Railroad Retirement payment (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

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 SPOUSE/PARTNER SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT

ENTER NUMBER

Range 1 to 9999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999.
Do not display the phrase 'Enter Number'.
If IA16A = 1-9999, go to BOX IA17

IA16B

ia5ssrrptest

R5 IA16B ESTIMT PARTNR SS RR AMT

QUESTION TEXT:

SHOW CARD IA3

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

CODES

- 1 LESS THAN \$700,
- 2 \$700 TO LESS THAN \$1,000
- 3 \$1,000 TO LESS THAN \$1,300
- 4 \$1,300 TO LESS THAN \$1,600
- 5 \$1,600 OR MORE
- REFUSED
- DON'T KNOW

BOX IA17

BOXIA17

NOT ON FILE

If IA4 = 1 (SP RECEIVED SSI) and 2 (SPOUSE RECEIVED SSI), go to IA17.
Else if IA4 = 1 (SP RECEIVED SSI), go to IA18A.
Else if IA4 = 2 (SPOUSE RECEIVED SSI), go to IA19A.
Otherwise, go to BOX IA20.

DISPLAY INSTRUCTIONS:

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

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

QUESTION TEXT:

What was the amount of {your/SP's} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s most recent monthly SSI payment (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

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.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY	IA18A
	REFUSED	IA17B
	DON'T KNOW	IA17B

IA17A

ia5ssijtamt

R5 IA17A JOINT SSI AMT

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER SSI AMOUNT

ENTER NUMBER

Range

1 to 9999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999.

Do not display the phrase 'Enter Number'.

If IA17A = 1-9999, go to BOX IA20.

IA17B

ia5ssijtest

R5 IA17B ESTIMATE JOINT SSI AMT

QUESTION TEXT:

SHOW CARD IA4

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

CODES

1	LESS THAN \$300,	BOX IA20
2	\$300 TO LESS THAN \$700,	BOX IA20
3	\$700 TO LESS THAN \$1000	BOX IA20
4	\$1000 OR MORE	BOX IA20
	REFUSED	BOX IA20
	DON'T KNOW	BOX IA20

IA18A**ia5ssispamt**

R5 IA18A SP SSI AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES), display
"your". Otherwise, display "SP's".

QUESTION TEXT:

What was the amount of {your/SP's} most recent monthly SSI payment (for the month of {CURRENT MONTH
- 1})?

IF NEEDED: We don't need an exact dollar amount.

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 SP SSI AMOUNT

ENTER NUMBER

Range 1 to 9999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999
Do not display the phrase 'Enter Number'.
If IA18A = 1-9999, go to BOX IA19A.

IA18B**ia5ssispest**

R5 IA8B ESTIMATE SP SSI AMOUNT

QUESTION TEXT:

SHOW CARD IA5

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

CODES

1 LESS THAN \$100,
2 \$100 TO LESS THAN \$200
3 \$200 TO LESS THAN \$400
4 \$400 TO LESS THAN \$700
5 \$700 OR MORE
REFUSED
DON'T KNOW

BOX IA19A**BOXIA19A**

NOT ON FILE

If IA17 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA19A.
Otherwise, go to BOX IA20.

IA19A

ia5ssiptamt

R5 IA19A PARTNR SSI AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".

QUESTION TEXT:

What was the amount of {your/{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} most recent monthly SSI payment (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

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 SPOUSE/PARTNER SSI AMOUNT

ENTER NUMBER

Range 1 to 9999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999.
Do not display the phrase 'Enter Number'.
If IA19A = 1-9999, go to BOX IA20.

IA19B

ia5ssiptest

R5 IA19B ESTIMATE PARTNR SSI AMT

QUESTION TEXT:

SHOW CARD IA5

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

CODES

- 1 LESS THAN \$100,
- 2 \$100 TO LESS THAN \$200
- 3 \$200 TO LESS THAN \$400
- 4 \$400 TO LESS THAN \$700
- 5 \$700 OR MORE
- REFUSED
- DON'T KNOW

BOX IA20

BOX IA20

NOT ON FILE

If IA5 = 1 (SP RECEIVED VA) and 2 (SPOUSE RECEIVED VA), go to IA20.
Else if IA5 = 1 (SP RECEIVED VA), go to IA21A.
Else if IA5 = 2 (SPOUSE RECEIVED VA), go to IA22A.
Otherwise, go to BOX IA23.

IA20

ia5vapymnt

R5 IA20 RECENT MNTHLY VA PAYMENT

IA21A

ia5vaspamt

R5 IA21A SP VA AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES), display "your". Otherwise, display "SP's".

QUESTION TEXT:

What was the amount of {your/SP's} most recent monthly Veteran's Administration payment (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

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 SP VA AMOUNT

ENTER NUMBER

Range	1 to 9999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999
 Do not display the phrase 'Enter Number'.
 If IA21A = 1-9999, go to BOX IA22A.

IA21B

ia5vaspest

R5 IA21B ESTIMATE SP VA AMOUNT

QUESTION TEXT:

SHOW CARD IA7

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

CODES

- 1 LESS THAN \$500
 - 2 \$500 TO LESS THAN \$700
 - 3 \$700 TO LESS THAN \$900
 - 4 \$900 TO LESS THAN \$1,100
 - 5 \$1,100 OR MORE
- REFUSED
DON'T KNOW

BOX IA22A

BOX IA22A

NOT ON FILE

If IA20 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA22A.
 Otherwise, go to BOX IA23.

IA22A**ia5vaptamt**

R5 IA22A PARTNER VA AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “your”.
 Otherwise, display “{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s”.

QUESTION TEXT:

What was the amount of {your/{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} most recent monthly Veteran’s Administration payment (for the month of {CURRENT MONTH – 1})?

IF NEEDED: We don’t need an exact dollar amount.

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 SPOUSE/PARTNER VA AMOUNT

ENTER NUMBER

Range	1 to 9999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999.
 Do not display the phrase 'Enter Number'.
 If IA22A = 1-9999, go to BOX IA23.

IA22B**ia5vaptest**

R5 IA22B ESTIMATE PARTNR VA AMT

QUESTION TEXT:

SHOW CARD IA7

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

CODES

1	LESS THAN \$500
2	\$500 TO LESS THAN \$700
3	\$700 TO LESS THAN \$900
4	\$900 TO LESS THAN \$1,100
5	\$1,100 OR MORE
	REFUSED
	DON'T KNOW

BOX IA23**BOX IA23**

NOT ON FILE

If IA6 = 1 (SP RECEIVED PENSION PLAN) and 2 (SPOUSE RECEIVED PENSION PLAN), go to IA23.
 Else if IA6 = 1 (SP RECEIVED PENSION PLAN), go to IA24A.
 Else if IA6 = 2 (SPOUSE RECEIVED PENSION PLAN), go to IA25A.
 Otherwise, go to BOX IA26.

DISPLAY INSTRUCTIONS:

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

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

QUESTION TEXT:

You told me earlier that {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} have job-related pension plans. In all, how much was received from these pension plans in the last month, before any federal or state taxes were taken out (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

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.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY	IA24A
	REFUSED	IA23B
	DON'T KNOW	IA23B

IA23A

ia5penjamt

R5 IA23A JOINT JOB PENSION AMT

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER PENSION PLAN AMOUNT

ENTER NUMBER

Range

1 to 9999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999

Do not display the phrase 'Enter Number'.

If IA23A = 1-9999, go to BOX IA26.

IA23B

ia5penjtest

R5 IA23B EST JOINT JOB PENSN AMT

QUESTION TEXT:

SHOW CARD IA8

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

CODES

1	LESS THAN \$600,	BOX IA26
2	\$600 TO LESS THAN \$1,300	BOX IA26
3	\$1,300 TO LESS THAN \$2,100	BOX IA26
4	\$2,100 TO LESS THAN \$5,900	BOX IA26

5	\$5,900 OR MORE REFUSED DON'T KNOW	BOX IA26 BOX IA26 BOX IA26
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IA24A	ia5penspamt	R5 IA24A SP JOB PENSION AMOUNT
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DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES), display "you have" and your".
Otherwise, display "SP has" and "SP's".

If IA23=2, (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), display "{your/SP's} job-related".
Otherwise, display "You told me earlier that {you have/SP has} a job-related pension plan." and "this".

QUESTION TEXT:

{You told me earlier that {you have/SP has} a job-related pension plan.} In all, how much was received from {{your/SP's} job-related /this} pension plan in the last month, before any federal or state taxes were taken out (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

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 SP PENSION PLAN AMOUNT

ENTER NUMBER

Range REFUSED DON'T KNOW	1 to 9999
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PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999
Do not display the phrase 'Enter Number'.
If IA24A = 1-9999, go to BOX IA25A.

IA24B	ia5penspest	R5 IA24B EST SP JOB PENSION AMT
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QUESTION TEXT:

SHOW CARD IA9

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

CODES

1	LESS THAN \$400
2	\$400 TO LESS THAN \$900
3	\$900 TO LESS THAN \$1,600
4	\$1,600 TO LESS THAN \$3,800
5	\$3,800 OR MORE
	REFUSED
	DON'T KNOW

BOX IA25A	BOX IA25A	NOT ON FILE
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If IA23 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA25A.
Otherwise, go to BOX IA26.

IA25A**ia5pentamt**

R5 IA25A PARTNR JOB PENSN AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you have" and "your".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME} has" and "{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".

If IA23 = 2 (ENTER SP and SPOUSE/PARTNER AMOUNTS SEPARATELY), display "{your/SP's} job-related".
Otherwise, display "You told me earlier that {you have/{SPOUSE/PARTNER FIRSTNAME LASTNAME} has} a job-related pension plan" and "this".

QUESTION TEXT:

{You told me earlier that {you have/{SPOUSE/PARTNER FIRSTNAME LASTNAME} has} a job-related pension plan.} In all, how much was received from {{your/{SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} job-related/this} pension plan in the last month, before any federal or state taxes were taken out (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

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 SPOUSE/PARTNER PENSION PLAN AMOUNT

ENTER NUMBER

Range 1 to 9999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999
Do not display the phrase 'Enter Number'.
If IA25A = 1-9999, go to BOX IA26.

IA25B**ia5penptest**

R5 IA25B EST PARTNR JOB PEN AMT

QUESTION TEXT:

SHOW CARD IA9

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

CODES

1 LESS THAN \$400
2 \$400 TO LESS THAN \$900
3 \$900 TO LESS THAN \$1,600
4 \$1,600 TO LESS THAN \$3,800
5 \$3,800 OR MORE
REFUSED
DON'T KNOW

If IA7 = 1 (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IA26.
 Else if IA7 = 1 (SP HAS RETIREMENT ACCT), go to IA27A.
 Else if IA7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to IA28A.
 Otherwise, go to BOX IA35.

IA26

ia5retworth

R5 IA26 RETIREMENT ACCOUNT WORTH

DISPLAY INSTRUCTIONS:

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

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

Display "currently" in underlined text.

QUESTION TEXT:

This next question is a bit different. You mentioned that {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} have retirement accounts. In total, about how much is currently in all of these retirement accounts?

IF NEEDED: Retirement accounts include 401K, 403B, IRA and other retirement accounts.

IF NEEDED: We don't need an exact dollar amount.

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.

CODES

- | | | |
|---|--|-------|
| 1 | ENTER COMBINED AMOUNT | |
| 2 | ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY | IA27A |
| | REFUSED | IA26B |
| | DON'T KNOW | IA26B |

IA26A

ia5retjwrt

R5 IA26A JOINT RETIR ACCT WORTH

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT AMOUNT

ENTER NUMBER

Range

1 to 9999999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999
 Do not display the phrase 'Enter Number'.

If IA26A = 1-9999999, go to BOX IA29.

IA26B**ia5retjtest**

R5 IA26B EST JOINT RET ACCT WRTH

QUESTION TEXT:

SHOW CARD IA10

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

CODES

1	LESS THAN \$34,000	BOX IA29
2	\$34,000 TO LESS THAN \$82,000	BOX IA29
3	\$82,000 TO LESS THAN \$175,000	BOX IA29
4	\$175,000 TO LESS THAN \$413,000	BOX IA29
5	\$413,000 OR MORE	BOX IA29
	REFUSED	BOX IA29
	DON'T KNOW	BOX IA29

IA27A**ia5retspwrt**

R5 IA27A SP RETIREMENT ACCT WRTH

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES), display "you have".
Otherwise, display "SP has".

Display "currently" in underlined text.

QUESTION TEXT:

This next question is a bit different. You mentioned that {you have/SP has} retirement accounts.
In total, about how much is currently in all of these retirement accounts?

IF NEEDED: Retirement accounts include 401K, 403B, IRA and other retirement accounts.

IF NEEDED: We don't need an exact dollar amount.

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 SP RETIREMENT ACCOUNT AMOUNT

ENTER NUMBER

Range	1 to 9999999
REFUSED	
DON'T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999
Do not display the phrase 'Enter Number'.
If IA27A = 1-9,999,999, go to BOX IA28A.

IA27B**ia5retspst**

R5 IA27B EST SP RET ACCT WORTH

QUESTION TEXT:

SHOW CARD IA11

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

CODES

- 1 LESS THAN \$20,000
 - 2 \$20,000 TO LESS THAN \$47,000
 - 3 \$47,000 TO LESS THAN \$92,000
 - 4 \$92,000 TO LESS THAN \$218,000
 - 5 \$218,000 OR MORE
- REFUSED
DON'T KNOW

BOX IA28A

BOXIA28A

NOT ON FILE

If IA26 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA28A.
Otherwise, go to BOX IA29.

IA28A

ia5retptwrt

R5 IA28A PRTNR RET ACCT WORTH

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you have".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME} has".

Display "currently" in underlined text.

QUESTION TEXT:

This next question is a bit different. You mentioned that {you have/{SPOUSE/PARTNER FIRSTNAME LASTNAME} has} retirement accounts. In total, about how much is currently in all of these retirement accounts?

IF NEEDED: Retirement accounts include 401K, 403B, IRA and other retirement accounts.

IF NEEDED: We don't need an exact dollar amount.

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 SPOUSE/PARTNER RETIREMENT ACCOUNT AMOUNT

ENTER NUMBER

Range 1 to 999999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$999,999
Do not display the phrase 'Enter Number'.
If IA28A = 1-999999, go to BOX IA29.

IA28B

ia5retptest

R5 IA28B EST PARTNR ACCT WORTH

QUESTION TEXT:

SHOW CARD IA11

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

CODES

- 1 LESS THAN \$20,000
 - 2 \$20,000 TO LESS THAN \$47,000
 - 3 \$47,000 TO LESS THAN \$92,000
 - 4 \$92,000 TO LESS THAN \$218,000
 - 5 \$218,000 OR MORE
- REFUSED
DON'T KNOW

BOX IA29

BOX IA29

NOT ON FILE

If IA7 = 1 (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IA29.
Else if IA7 = 1 (SP HAS RETIREMENT ACCT), go to IA30A.
Else if IA7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to IA31A.
Otherwise, go to BOX IA35.

IA29

ia5rtlmwdrw

R5 IA29 RETRMNT WDRW AMT LST MTH

DISPLAY INSTRUCTIONS:

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

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

Display "Last month" in underlined text.

QUESTION TEXT:

Last month, how much altogether did {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} receive or withdraw from all of these retirement accounts (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

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.

CODES

- 1 ENTER COMBINED AMOUNT
- 2 ENTER SP AND SPOUSE/PARTNER AMOUNTS IA30A
SEPARATELY
- REFUSED IA29B
- DON'T KNOW IA29B

IA29A

ia5rtlmjtwdr

R5 IA29A JOINT RET WDRW LST MTH

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/ WITHDRAWN AMOUNT

ENTER NUMBER

Range

0 to 99999

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$99,999
Do not display the phrase 'Enter Number'.
If IA29A = 0-99,999, go to BOX IA32.

IA29B

ia5rtlmjtest

R5 IA29B EST JONT RET WDR LS MTH

DISPLAY INSTRUCTIONS:

Display "last month" in underlined text.

QUESTION TEXT:

SHOW CARD IA12

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

CODES

1	LESS THAN \$200	BOX IA32
2	\$200 TO LESS THAN \$500	BOX IA32
3	\$500 TO LESS THAN \$1,000	BOX IA32
4	\$1,000 TO LESS THAN \$2,500	BOX IA32
5	\$2,500 OR MORE	BOX IA32
	REFUSED	BOX IA32
	DON'T KNOW	BOX IA32

IA30A

ia5rtlmjtest

R5 IA30A SP RET WDRWL LAST MONTH

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES), display "you" and "your".
Otherwise, display "SP" and "{his/her}".

Display "Last month" in underlined text.

QUESTION TEXT:

Last month, how much altogether did {you/SP} receive or withdraw from {your/his/her} retirement accounts (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

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 SP RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT

ENTER NUMBER

Range

0 to 99999

REFUSED

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$99,999
Do not display the phrase 'Enter Number'.
If IA30A = 0-99999, go to BOX IA31A.

IA30B

ia5rtlmspest

R5 IA30B EST SP RET WDR LST MNTH

QUESTION TEXT:

SHOW CARD IA13

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

CODES

- | | |
|---|----------------------------|
| 1 | LESS THAN \$100 |
| 2 | \$100 TO LESS THAN \$300 |
| 3 | \$300 TO LESS THAN \$700 |
| 4 | \$700 TO LESS THAN \$1,700 |
| 5 | \$1,700 OR MORE |
| | REFUSED |
| | DON'T KNOW |

BOX IA31A

BOX IA3A

NOT ON FILE

If IA29 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA31A.
Otherwise, go to BOX IA32.

IA31A

ia5rtlmptwdr

R5 IA31A PARTNR RET WDR LST MTH

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “you” and “your”.
Otherwise, display “{SPOUSE/PARTNER FIRSTNAME LASTNAME}” and “{his/her}”.

Display “Last month” in underlined text.

QUESTION TEXT:

Last month, how much altogether did {you/{SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive or withdraw from {your/his/her} retirement accounts (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

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 SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/ WITHDRAWN AMOUNT

ENTER NUMBER

Range 0 to 99999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$99,999

Do not display the phrase 'Enter Number'.
If IA31A = 0-99,999, go to BOX IA32.

IA31b

ia5rtlmpstest

R5 IA31B EST PARTNR WDR LST MTH

QUESTION TEXT:

SHOW CARD IA13

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

CODES

- 1 LESS THAN \$100
- 2 \$100 TO LESS THAN \$300
- 3 \$300 TO LESS THAN \$700
- 4 \$700 TO LESS THAN \$1,700
- 5 \$1,700 OR MORE
- REFUSED
- DON'T KNOW

BOX IA32

BOXIA32

NOT ON FILE

If IA7 = 1 (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IA32.
Else if IA7 = 1 (SP HAS RETIREMENT ACCT), go to IA33A.
Else if IA7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to IA34A.
Otherwise, go to BOX IA35.

IA32

ia5rtyrwdrw

R5 IA32 RETRMNT WDRWL AMT LST YR

DISPLAY INSTRUCTIONS:

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

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

Display "last year" in underlined text.

QUESTION TEXT:

Now thinking about all of last year (that is calendar year {CURRENT YEAR - 1}), how much altogether did {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} receive or withdraw from all of these retirement accounts?

IF NEEDED: We don't need an exact dollar amount.

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.

CODES

- 1 ENTER COMBINED AMOUNT
 - 2 ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY
- IA33A
IA32B

REFUSED
DON'T KNOW

IA32B

IA32A

ia5rtyrjtamt

R5 IA32A AMT JOINT RET WDR LS YR

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/ WITHDRAWN AMOUNT

ENTER NUMBER

Range

0 to 9999999

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$9,999,999
Do not display the phrase 'Enter Number'.
If IA32A = 0-9999999, go to BOX IA35.

IA32B

ia5rtyrjtest

R5 IA32B EST JOINT RET WDR LS YR

QUESTION TEXT:

SHOW CARD IA14

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

CODES

1	LESS THAN \$2,400	BOX IA35
2	\$2,400 TO LESS THAN \$6,000	BOX IA35
3	\$6,000 TO LESS THAN \$12,000	BOX IA35
4	\$12,000 TO LESS THAN \$30,000	BOX IA35
5	\$30,000 OR MORE	BOX IA35
	REFUSED	BOX IA35
	DON'T KNOW	BOX IA35

IA33A

ia5rtyrspamt

R5 IA33A SP AMT RCVWDR RET LS YR

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES), display "you" and "your".
Otherwise, display "SP" and "{his/her}".

Display "last year" in underlined text.

QUESTION TEXT:

Now thinking about all of last year (that is calendar year {CURRENT YEAR - 1}), how much altogether did {you/SP} receive or withdraw from all of {your/his/her} retirement plans?

IF NEEDED: We don't need an exact dollar amount.

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 SP RETIREMENT ACCOUNT RECEIVED/ WITHDRAWN AMOUNT

ENTER NUMBER

Range 0 to 9999999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$9,999,999
Do not display the phrase 'Enter Number'.
If IA33A = 0-9999999, go to BOX IA34A.

IA33B

ia5rtyrspst

R5 IA33B EST SP RCVWDR RET LS YR

QUESTION TEXT:

SHOW CARD IA15

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

CODES

- 1 LESS THAN \$1,200
 - 2 \$1,200 TO LESS THAN \$3,600
 - 3 \$3,600 TO LESS THAN \$8,400
 - 4 \$8,400 TO LESS THAN \$20,400
 - 5 \$20,400 OR MORE
- REFUSED
DON'T KNOW

BOX IA34A

BOX IA34A

NOT ON FILE

If IA32 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA34A.
Otherwise, go to BOX IA35.

IA34A

ia5rtyrptamt

R5 IA34A PARTNR RCVWDR RET LS YR

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you" and "your".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME}" and "{his/her}".

Display "last year" in underlined text.

QUESTION TEXT:

Now thinking about all of last year (that is calendar year {CURRENT YEAR - 1}), how much altogether did {you/{SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive or withdraw from all of {your/his/her} retirement plans?

IF NEEDED: We don't need an exact dollar amount.

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 SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT

ENTER NUMBER

Range 0 to 9999999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$9,999,999
Do not display the phrase 'Enter Number'.
If IA34A = 0-9999999, go to BOX IA35.

IA34B

ia5rtyrptest

R5 IA34B EST PRTNR WDR RET LS YR

QUESTION TEXT:

SHOW CARD IA15

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

CODES

- 1 LESS THAN \$1,200
- 2 \$1,200 TO LESS THAN \$3,600
- 3 \$3,600 TO LESS THAN \$8,400
- 4 \$8,400 TO LESS THAN \$20,400
- 5 \$20,400 OR MORE REFUSED
DON'T KNOW

BOX IA35

BOX IA35

NOT ON FILE

If [IA8 = 1 (SP MUTUAL FUNDS) and IA8 = 2 (SPOUSE MUTUAL FUNDS)] or IA8 = 3 (JOINT MUTUAL FUNDS) or [IA9 = 1 (SP BONDS) and IA9 = 2 (SPOUSE BONDS)] or IA9 = 3 (JOINT BONDS), go to IA35.
Else if IA8 = 1 (SP MUTUAL FUNDS) or IA9 = 1 (SP BONDS), go to IA36A.
Else if IA8 = 2 (SPOUSE MUTUAL FUNDS) or IA9 = 2 (SPOUSE BONDS), go to IA37A.
Otherwise, go to BOX IA38.

IA35

ia5skbdwrth

R5 IA35 NONRETR STKS BNDS WRTH

DISPLAY INSTRUCTIONS:

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

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

If IA8 = 1 (SP MUTUAL FUNDS) or 2 (SPOUSE MUTUAL FUNDS) or 3 (JOINT MUTUAL FUNDS), display "mutual funds or stocks".

If IA9 = 1 (SP BONDS) or 2 (SPOUSE BONDS) or 3 (JOINT BONDS), display "government, corporate, or other bonds".

If more than one type of asset displayed, display "and" between them.

QUESTION TEXT:

You told me earlier that {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME

LASTNAME} own {mutual funds or stocks} {government, corporate, or other bonds} that are not part of retirement accounts. About how much are these worth?

IF NEEDED: We don't need an exact dollar amount.

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.

CODES

- | | | |
|---|--|-----------|
| 1 | ENTER COMBINED AMOUNT | |
| 2 | ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY | IA36A |
| | REFUSED | BOX IA35B |
| | DON'T KNOW | BOX IA35B |

IA35A

ia5skbdjtwrt

R5 IA35A JOINT STKS BNDS WRTH

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE'S/PARTNER MUTUAL FUNDS/STOCKS/BONDS AMOUNT

ENTER NUMBER

Range

1 to 9999999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999

Do not display the phrase 'Enter Number'.

If IA35A = 1-9999999, go to BOX IA38.

BOX IA35B

BOXIA35B

NOT ON FILE

If [IA8 = 1 (SP MUTUAL FUNDS) and IA8 = 2 (SPOUSE MUTUAL FUNDS)] or IA8 = 3 (JOINT MUTUAL FUNDS), go to IA35b.
Otherwise, go to IA35c.

IA35b

ia5skbdjttest

R5 IA35B EST JOINT STKS BNDS WRT

QUESTION TEXT:

SHOW CARD IA16

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

CODES

- | | | |
|---|---------------------------------|----------|
| 1 | LESS THAN \$9,000 | BOX IA38 |
| 2 | \$9,000 TO LESS THAN \$18,000 | BOX IA38 |
| 3 | \$18,000 TO LESS THAN \$93,000 | BOX IA38 |
| 4 | \$93,000 TO LESS THAN \$350,000 | BOX IA38 |
| 5 | \$350,000 OR MORE | BOX IA38 |
| | REFUSED | BOX IA38 |
| | DON'T KNOW | BOX IA38 |

QUESTION TEXT:

SHOW CARD IA17

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

CODES

1	LESS THAN \$600	BOX IA38
2	\$600 TO LESS THAN \$5,000	BOX IA38
3	\$5,000 TO LESS THAN \$16,000	BOX IA38
4	\$16,000 TO LESS THAN \$62,000	BOX IA38
5	\$62,000 OR MORE	BOX IA38
	REFUSED	BOX IA38
	DON'T KNOW	BOX IA38

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES), display "you own".
 Otherwise, display "SP owns".

If IA8 = 1 (SP MUTUAL FUNDS), display "mutual funds or stocks".
 If IA9 = 1 (SP BONDS), display "government, corporate, or other bonds".

If more than one type of asset displayed, display "and" between them.

QUESTION TEXT:

You told me earlier that {you own/SP owns}{mutual funds or stocks}{government, corporate, or other bonds} that are not part of retirement accounts. About how much are these worth?

IF NEEDED: We don't need an exact dollar amount.

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 SP MUTUAL FUNDS/STOCKS/BONDS AMOUNT

ENTER NUMBER

Range 1 to 9999999
 REFUSED
 DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999
 Do not display the phrase 'Enter Number'.
 If IA36A = 1-9999999, go to BOX IA37A.

If IA8 = 1 (SP MUTUAL FUNDS), go to IA36b.
 Otherwise, go to IA36c.

IA36B**ia5skbdspest**

R5 IA36B EST SP STKS BNDS WRTH

QUESTION TEXT:

SHOW CARD IA18

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

CODES

1	LESS THAN \$8,000	BOX IA37A
2	\$8,000 TO LESS THAN \$62,000	BOX IA37A
3	\$62,000 TO LESS THAN \$192,000	BOX IA37A
4	\$192,000 TO LESS THAN \$213,000	BOX IA37A
5	\$213,000 OR MORE	BOX IA37A
	REFUSED	BOX IA37A
	DON'T KNOW	BOX IA37A

IA36C**ia5bndspest**

R5 IA36C EST SP ONLY BNDS WRTH

QUESTION TEXT:

SHOW CARD IA19

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

CODES

1	LESS THAN \$300
2	\$300 TO LESS THAN \$2,500
3	\$2,500 TO LESS THAN \$8,000
4	\$8,000 TO LESS THAN \$37,000
5	\$37,000 OR MORE
	REFUSED
	DON'T KNOW

BOX IA37A**BOX IA37A****NOT ON FILE**

If IA8 = 2 (SPOUSE MUTUAL FUNDS) or IA9 = 2 (SPOUSE BONDS), go to IA37A.
Otherwise, go to BOX IA38.

IA37a**ia5skbdptwrt**

R5 IA37A PARTNR STKS BNDS WRTH

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you own".
Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME} owns".

If IA8 = 2 (SPOUSE MUTUAL FUNDS), display "mutual funds or stocks".
If IA9 = 2 (SPOUSE BONDS), display "government, corporate, or other bonds".

If more than one type of asset displayed, display "and" between each one.

QUESTION TEXT:

You told me earlier that {you own/{SPOUSE/PARTNER FIRSTNAME LASTNAME} owns}{mutual funds or stocks}{government, corporate, or other bonds} that are not part of retirement accounts. About how much are these worth?

IF NEEDED: We don't need an exact dollar amount.

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 SPOUSE'S/PARTNER'S MUTUAL FUNDS/STOCKS/BONDS AMOUNT

ENTER NUMBER

Range 1 to 9999999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999
Do not display the phrase 'Enter Number'.
If IA37A = 1-9999999, go to BOX IA38.

BOX IA37b

BOXIA37b

NOT ON FILE

If IA8 = 2 (SPOUSE MUTUAL FUNDS), go to IA37b.
Otherwise, go to IA37c.

IA37B

ia5skbdptest

R5 IA37B PART EST STKS BNDS WRTH

QUESTION TEXT:

SHOW CARD IA18

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

CODES

1	LESS THAN \$8,000	BOX IA38
2	\$8,000 TO LESS THAN \$62,000	BOX IA38
3	\$62,000 TO LESS THAN \$192,000	BOX IA38
4	\$192,000 TO LESS THAN \$213,000	BOX IA38
5	\$213,000 OR MORE	BOX IA38
	REFUSED	BOX IA38
	DON'T KNOW	BOX IA38

IA37C

ia5bndptest

R5 IA37C PART EST ONLY BNDS WRTH

QUESTION TEXT:

SHOW CARD IA19

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

CODES

1	LESS THAN \$300
2	\$300 TO LESS THAN \$2,500

- 3 \$2,500 TO LESS THAN \$8,000
- 4 \$8,000 TO LESS THAN \$37,000
- 5 \$37,000 OR MORE
- REFUSED
- DON'T KNOW

BOX IA38

BOX IA38

NOT ON FILE

If [IA10A = 1 (SP CHECKING) and IA10A = 2 (SPOUSE CHECKING)] or IA10A = 3 (JOINT CHECKING) or [IA10B = 1 (SP SAVINGS) and IA10B = 2 (SPOUSE SAVINGS)] or IA10B = 3 (JOINT SAVINGS), or [IA10C = 1 (SP CDS) and IA10C = 2 (SPOUSE CDS)] or IA10C = 3 (JOINT CDS), go to IA38.
 Else if IA10A = 1 (SP CHECKING) or IA10B = 1 (SP SAVINGS) or IA10C = 1 (SP CDS), go to IA39A.
 Else if IA10A = 2 (SPOUSE CHECKING) or IA10B = 2 (SPOUSE SAVINGS) or IA10C = 2 (SPOUSE CDS), go to IA40A.
 Otherwise, go to BOX IA41.

IA38

ia5bkcdwrth

R5 IA38 BANK ACCT CD WORTH

DISPLAY INSTRUCTIONS:

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

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

If IA10A = 1 (SP CHECKING) or IA10A = 2 (SPOUSE CHECKING) or IA10A = 3 (JOINT CHECKING), display "checking accounts".
 If IA10B = 1 (SP SAVINGS) or IA10B = 2 (SPOUSE SAVINGS) or IA10B = 3 (JOINT SAVINGS), display "savings or money market accounts".
 If IA10C = 1 (SP CDS) or IA10C = 2 (SPOUSE CDS) or IA10C = 3 (JOINT CDS), display "certificates of deposit or CDs".

If more than one type of account displayed, display "and" between each one.

Display "last month" in underlined text.

QUESTION TEXT:

You told me earlier that {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} have {checking accounts} {savings or money market accounts} {certificates of deposit or CDs}.

If you added up all of these accounts, about how much were they worth early last month (meaning in the beginning of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

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.

CODES

- 1 ENTER COMBINED AMOUNT
 - 2 ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY
 - REFUSED
- IA39A
BOX IA38B
BOX IA38B

DON'T KNOW

IA38A

ia5bkcdjtwrt

R5 IA38A JOINT BNK ACCT CD WRTH

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER ACCOUNTS TOTAL AMOUNT

ENTER NUMBER

Range

1 to 9999999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999

Do not display the phrase 'Enter Number'.

If IA38A = 1-9,999,999, go to BOX IA41a.

BOX IA38B

BOX IA38B

NOT ON FILE

If IA10C = [1 (SP CDs) and 2 (SPOUSE CDs)] or 3 (JOINT CDs), go to IA38B.
Otherwise, go to IA38C.

IA38B

ia5bnkjtest

R5 IA38B EST JOINT BNK CD WRTH

QUESTION TEXT:

SHOW CARD IA20

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

CODES

1	LESS THAN \$11,000	BOX IA41
2	\$11,000 TO LESS THAN \$25,000	BOX IA41
3	\$25,000 TO LESS THAN \$50,000	BOX IA41
4	\$50,000 TO LESS THAN \$108,000	BOX IA41
5	\$108,000 OR MORE	BOX IA41
	REFUSED	BOX IA41
	DON'T KNOW	BOX IA41

IA38C

ia5bnkjtest

R5 IA38C EST JOINT BNK NO CD WRT

QUESTION TEXT:

SHOW CARD IA21

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

CODES

1	LESS THAN \$2,000	BOX IA41
2	\$2,000 TO LESS THAN \$7,000	BOX IA41
3	\$7,000 TO LESS THAN \$17,000	BOX IA41
4	\$17,000 TO LESS THAN \$57,000	BOX IA41
5	\$57,000 OR MORE	BOX IA41

REFUSED
DON'T KNOW

BOX IA41
BOX IA41

IA39A

ia5bkcdspwrt

R5 IA39A SP BNK CDS WORTH

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES), display "you have".
Otherwise, display "SP has".

If IA10A = 1 (SP CHECKING), display "a checking account".
If IA10B = 1 (SP SAVINGS), display "a savings or money market account".
If IA10C = 1 (SP CDS), display "certificates of deposit or CDs".

If more than one type of account displayed, display "and" between each one.

Display "last month" in underlined text.

QUESTION TEXT:

You told me earlier that {you have/SP has}{a checking account}{a savings or money market account}
{certificates of deposit or CDs}.

If you added up all of these accounts, about how much were they worth early last month (meaning
in the beginning of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

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 SP ACCOUNTS TOTAL AMOUNT

ENTER NUMBER

Range 1 to 9999999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999
Do not display the phrase 'Enter Number'.
If IA39A = 1-9,999,999, go to BOX IA40A.

BOX IA39B

BOX IA39B

NOT ON FILE

If IA10C = 1 (SP CDs), go to IA39B.
Otherwise, go to IA39C.

IA39B

ia5bkcdspst

R5 IA39B SP EST BNK ACCT CD WRTH

QUESTION TEXT:

SHOW CARD IA22

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

CODES

1	LESS THAN \$8,000	BOX IA40A
2	\$8,000 TO LESS THAN \$13,000	BOX IA40A
3	\$13,000 TO LESS THAN \$28,000	BOX IA40A
4	\$28,000 TO LESS THAN \$54,000	BOX IA40A
5	\$54,000 OR MORE	BOX IA40A
	REFUSED	BOX IA40A
	DON'T KNOW	BOX IA40A

IA39C**ia5bnkspst**

R5 IA39C SP EST BNK NO CD WRTH

QUESTION TEXT:

SHOW CARD IA23

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

CODES

1	LESS THAN \$500
2	\$500 TO LESS THAN \$1,900
3	\$1,900 TO LESS THAN \$5,000
4	\$5,000 TO LESS THAN \$20,000
5	\$20,000 OR MORE
	REFUSED
	DON'T KNOW

BOX IA40A**BOXIA40A**

NOT ON FILE

If IA10A = 2 (SPOUSE CHECKING) or IA10B = 2 (SPOUSE SAVINGS) or IA10C = 2 (SPOUSE CDS), go to IA40A.
 Otherwise, go to BOX IA41.

IA40A**ia5bkcdptwrt**

R5 IA40A PARTNR BNK ACCT CD WRTH

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you have".
 Otherwise, display "{SPOUSE/PARTNER FIRSTNAME LASTNAME} has".

If IA10A = 2 (SPOUSE CHECKING), display "a checking account".
 If IA10B = 2 (SPOUSE SAVINGS), display "a savings or money market account".
 If IA10C = 2 (SPOUSE CDS), display "certificates of deposit or CDs".

If more than one type of account displayed, display "and" between each one.

Display "last month" in underlined text.

QUESTION TEXT:

You told me earlier that {you have/{SPOUSE/PARTNER FIRSTNAME LASTNAME} has} {a checking account} {a savings or money market account} {certificates of deposit or CDs}.

If you added up all of these accounts, about how much were they worth early last month (meaning in the beginning of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount.

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 SPOUSE/PARTNER ACCOUNTS TOTAL AMOUNT

ENTER NUMBER

Range 1 to 9999999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999,999
Do not display the phrase 'Enter Number'.
If IA40A = 1-9,999999, go to BOX IA41.

BOX IA40B

BOX IA40B

NOT ON FILE

If IA10C = 2 (SPOUSE CDS), go to IA40B.
Otherwise, go to IA40C.

IA40B

ia5bkcdptest

R5 IA40B EST PARTNR BNK CD WRTH

QUESTION TEXT:

SHOW CARD IA22

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

CODES

1	LESS THAN \$8,000	BOX IA41A
2	\$8,000 TO LESS THAN \$13,000	BOX IA41A
3	\$13,000 TO LESS THAN \$28,000	BOX IA41A
4	\$28,000 TO LESS THAN \$54,000	BOX IA41A
5	\$54,000 OR MORE	BOX IA41A
	REFUSED	BOX IA41A
	DON'T KNOW	BOX IA41A

IA40C

ia5bnkptest

R5 IA40C EST PART BNK NO CD WRTH

QUESTION TEXT:

SHOW CARD IA23

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

CODES

1	LESS THAN \$500
2	\$500 TO LESS THAN \$1,900
3	\$1,900 TO LESS THAN \$5,000
4	\$5,000 TO LESS THAN \$20,000
5	\$20,000 OR MORE
	REFUSED
	DON'T KNOW

BOX IA41

BOX IA41

NOT ON FILE

If [IA8 = 1 (SP MUTUAL FUNDS) and IA8 = 2 (SPOUSE MUTUAL FUNDS)] or IA8 = 3 (JOINT MUTUAL FUNDS) or [IA9 = 1 (SP BONDS) and IA9 = 2 (SPOUSE BONDS)] or IA9 = 3 (JOINT BONDS), or [IA10A = 1 (SP CHECKING) and IA10A = 2 (SPOUSE CHECKING)] or IA10A = 3 (JOINT CHECKING) or [IA10B = 1 (SP SAVINGS) and IA10B = 2 (SPOUSE SAVINGS)] or IA10B = 3 (JOINT SAVINGS), or [IA10C = 1 (SP CDS) and IA10C = 2 (SPOUSE CDS)] or IA10C = 3 (JOINT CDS), go to IA41.
Else if IA8 = 1 (SP MUTUAL FUNDS) or IA9 = 1 (SP BONDS) or IA10A = 1 (SP CHECKING) or IA10B = 1 (SP SAVINGS) or IA10C = 1 (SP CDS), go to IA42A.
Else if IA8 = 2 (SPOUSE MUTUAL FUNDS) or IA9 = 2 (SPOUSE BONDS) or IA10A = 2 (SPOUSE CHECKING) or IA10B = 2 (SPOUSE SAVINGS) or IA10C = 2 (SPOUSE CDS), go to IA43A.
Otherwise, go to BOX IA44.

IA41

ia5itdvinc

R5 IA41 AMT INT DIV INCOME LS YR

DISPLAY INSTRUCTIONS:

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

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

If IA8 = 1 (SP MUTUAL FUNDS) or 2 (SPOUSE MUTUAL FUNDS) or 3 (JOINT MUTUAL FUNDS), display "mutual funds or stocks".

If IA9 = 1 (SP BONDS) or 2 (SPOUSE BONDS) or 3 (JOINT BONDS), display "government, corporate, or other bonds".

If [IA10A = 1 (SP CHECKING) or 2 (SPOUSE CHECKING) or 3 (JOINT CHECKING)] or [IA10B = 1 (SP SAVINGS) or 2 (SPOUSE SAVINGS) or 3 (JOINT SAVINGS)] or [IA10C = 1 (SP CDS) or 2 (SPOUSE CDS) or 3 (JOINT CDS)], display "bank accounts or CDs".

If more than one type of asset displayed, display "and" between each one.

Display "In the last year" in underlined text.

QUESTION TEXT:

In the last year, how much interest and dividend income did {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} have altogether from {mutual funds or stocks} {government, corporate, or other bonds} {bank accounts or CDs}?

IF NEEDED: We don't need an exact dollar amount.

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.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY	IA42A
	REFUSED	IA41B
	DON'T KNOW	IA41B

IA41A

ia5itdvjtamt

R5 IA41A JOINT INT DIV INC LS YR

QUESTION TEXT:

ENTER SP AND SPOUSE'S/PARTNER'S INTEREST AND DIVIDEND INCOME AMOUNT

ENTER NUMBER

Range

0 to 99999

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$99,999

Do not display the phrase 'Enter Number'.

If IA41A = 0-99999, go to BOX IA44.

IA41B

ia5itdvjtest

R5 IA41B EST JNT INTDV INC LS YR

QUESTION TEXT:

SHOW CARD IA24

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

CODES

1	LESS THAN \$200	BOX IA44
2	\$200 TO LESS THAN \$1,000	BOX IA44
3	\$1,000 TO LESS THAN \$4,000	BOX IA44
4	\$4,000 TO LESS THAN \$16,000	BOX IA44
5	\$16,000 OR MORE	BOX IA44
	REFUSED	BOX IA44
	DON'T KNOW	BOX IA44

IA42A

ia5itdvspamt

R5 IA42A SP INT DIV INCOME LS YR

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES), display "you".
Otherwise, display "SP".

If IA8 = 1 (SP MUTUAL FUNDS), display "mutual funds or stocks".

If IA9 = 1 (SP BONDS), display "bonds".

If IA10A = 1 (SP CHECKING) or IA10B = 1 (SP SAVINGS) or IA10C = 1 (SP CDS), display "bank accounts or CDs".

If more than one type of asset displayed, display "and" between each one.

Display "In the last year" in underlined text.

QUESTION TEXT:

In the last year, how much interest and dividend income did {you/SP} have altogether from {mutual funds or stocks} {bonds} {bank accounts or CDs}?

IF NEEDED: We don't need an exact dollar amount.

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 SP INTEREST AND DIVIDEND INCOME AMOUNT

ENTER NUMBER

Range 0 to 9999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$9,999
Do not display the phrase 'Enter Number'.
If IA42A = 0-9999, go to BOX IA43A.

IA42B

ia5itdvspst

R5 IA42B EST SP INTDIV INC LS YR

QUESTION TEXT:

SHOW CARD IA25

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

CODES

- 1 LESS THAN \$400
 - 2 \$400 TO LESS THAN \$1,000
 - 3 \$1,000 TO LESS THAN \$2,000
 - 4 \$2,000 TO LESS THAN \$11,000
 - 5 \$11,000 OR MORE
- REFUSED
DON'T KNOW

BOX IA43A

BOXIA43A

NOT ON FILE

If IA8 = 2 (SPOUSE MUTUAL FUNDS) or IA9 = 2 (SPOUSE BONDS) or IA10A = 2 (SPOUSE CHECKING) or IA10B = 2 (SPOUSE SAVINGS) or IA10C = 2 (SPOUSE CDS), go to IA43aA
Otherwise, go to BOX IA44.

IA43A

ia5itdvptamt

R5 IA43A PART INT DIV INC LS YR

DISPLAY INSTRUCTIONS:

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

If IA8 = 2 (SPOUSE MUTUAL FUNDS), display "mutual funds or stocks".
If IA9 = 2 (SPOUSE BONDS), display "bonds".
If IA10A = 2 (SPOUSE CHECKING) or IA10B = 2 (SPOUSE SAVINGS) or IA10C = 2 (SPOUSE CDS), display "bank accounts or CDs".

If more than one type of asset displayed, display "and" between each one.

Display "In the last year" in underlined text.

QUESTION TEXT:

In the last year, how much interest and dividend income did {you/{SPOUSE/PARTNER FIRSTNAME LASTNAME}} have altogether from {mutual funds or stocks} {bonds} {bank accounts or CDs}?

IF NEEDED: We don't need an exact dollar amount.

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 SPOUSE/PARTNER INTEREST AND DIVIDEND INCOME AMOUNT

ENTER NUMBER

Range 0 to 9999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$9,999
Do not display the phrase 'Enter Number'.
If IA43A = 0-9999, go to BOX IA44.

IA43B

ia5itdvptest

R5 IA43B ESTPRT INT DV INC LS YR

QUESTION TEXT:

SHOW CARD IA25

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

CODES

- 1 LESS THAN \$400
- 2 \$400 TO LESS THAN \$1,000
- 3 \$1,000 TO LESS THAN \$2,000
- 4 \$2,000 TO LESS THAN \$11,000
- 5 \$11,000 OR MORE
- REFUSED
- DON'T KNOW

BOX IA44

BOX IA44

NOT ON FILE

If [IA13 = 1 (SP BUSINESS/FARM/REAL ESTATE) and IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE)] or IA13 = 3 (JOINT BUSINESS/FARM/REAL ESTATE), go to IA44.
Else if IA13 = 1 (SP BUSINESS/FARM/REAL ESTATE), go to IA45A.
Else if IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IA46A.
Otherwise, go to BOX IA47.

IA44

ia5brewrt

R5 IA44 BUSINESS REALESTATE WRTH

DISPLAY INSTRUCTIONS:

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

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

If HP1 = 1 (OWNS HOME), display "other than {SP}'s home".

QUESTION TEXT:

You told me earlier that {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} have a business, a farm, or real estate {other than {SP}'s home}. If that were sold today and any debts on it were paid off, about how much would it bring?

IF NEEDED: We don't need an exact dollar amount.

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.

CODES

- 1 ENTER COMBINED AMOUNT
- 2 ENTER SP AND SPOUSE/PARTNER AMOUNTS IA45A
SEPARATELY
- REFUSED IA44B
- DON'T KNOW IA44B

IA44A

ia5brejtwrt

R5 IA44A JOINT BUS REAL WRTH

QUESTION TEXT:

ENTER SP AND SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE COMBINED AMOUNT

ENTER NUMBER

Range

0 to 99999999

PROGRAMMER INSTRUCTIONS:

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

Do not display the phrase 'Enter Number'.

If IA44A = 0-99999999, go to BOX IA47.

IA44B

ia5brejtest

R5 IA44B EST JOINT BUS REAL WRTH

QUESTION TEXT:

SHOW CARD IA26

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

CODES

- 1 LESS THAN \$30,000 BOX IA47
- 2 \$30,000 TO LESS THAN \$101,000 BOX IA47
- 3 \$101,000 TO LESS THAN \$247,000 BOX IA47
- 4 \$247,000 TO LESS THAN \$703,000 BOX IA47
- 5 \$703,000 OR MORE BOX IA47
- REFUSED BOX IA47
- DON'T KNOW BOX IA47

IA45A

ia5brespwrt

R5 IA45A SP BUS REAL WRTH

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES), display “you have”.
Otherwise, display “SP has”.

If HP1 = 1 (OWNS HOME), display “other than {SP}'s home”

QUESTION TEXT:

You told me earlier that {you have/SP has} a business, a farm, or real estate {other than {SP}'s home}. If that were sold today and any debts on it were paid off, about how much would it bring?

IF NEEDED: We don't need an exact dollar amount.

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 SP BUSINESS/FARM/REAL ESTATE AMOUNT

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 IA45A = 0-99999999, go to BOX IA46A.

IA45B

ia5brespest

R5 IA45B EST SP BUS REAL WRTH

QUESTION TEXT:

SHOW CARD IA27

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

CODES

1 LESS THAN \$18,000
2 \$18,000 TO LESS THAN \$68,0000
3 \$68,000 TO LESS THAN \$122,000
4 \$122,000 TO LESS THAN \$293,000
5 \$293,000 OR MORE
REFUSED
DON'T KNOW

BOX IA46A

BOX IA46A

NOT ON FILE

If IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IA46A.
Otherwise, go to BOX IA47.

IA46A

ia5breptwrt

R5 IA46A PART BUS REAL WRTH

DISPLAY INSTRUCTIONS:

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “you have”.
Otherwise, display “{SPOUSE/PARTNER FIRSTNAME LASTNAME} has”.

If HP1 = 1 (OWNS HOME), display "other than {SP}'s home"

QUESTION TEXT:

You told me earlier that {you have/{SPOUSE/PARTNER FIRSTNAME LASTNAME} has} a business, a farm, or real estate {other than {SP}'s home}. If that were sold today and any debts on it were paid off, about how much would it bring?

IF NEEDED: We don't need an exact dollar amount.

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 SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE AMOUNT

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 IA46A = 0-99999999, go to BOX IA47.

IA46B

ia5bpretest

R5 IA46B EST PART BUS RE WRTH

QUESTION TEXT:

SHOW CARD IA27

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

CODES

1 LESS THAN \$18,000
2 \$18,000 TO LESS THAN \$68,000
3 \$68,000 TO LESS THAN \$122,000
4 \$122,000 TO LESS THAN \$293,000
5 \$293,000 OR MORE
REFUSED
DON'T KNOW

BOX IA47

BOX IA47

NOT ON FILE

If [IA13 = 1 (SP BUSINESS/FARM/REAL ESTATE) and IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE)] or IA13 = 3 (JOINT BUSINESS/FARM/REAL ESTATE), go to IA47.
Else if IA13 = 1 (SP BUSINESS/FARM/REAL ESTATE), go to IA48A.
Else if IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IA49A.
Otherwise, go to IA50.

IA47

ia5breiinc

R5 IA47 BUS REALESTATE INC LS YR

DISPLAY INSTRUCTIONS:

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

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

Display "In the last year" in underlined text.

QUESTION TEXT:

In the last year altogether, how much income did {you/SP} and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} receive from these businesses or property before any federal or state taxes were taken out?

IF NEEDED: We don't need an exact dollar amount.

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.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY	IA48A
	REFUSED	IA47B
	DON'T KNOW	IA47B

IA47A

ia5breijtam

R5 IA47A JOINT BUS RE INC LS YR

QUESTION TEXT:

ENTER SP AND SPOUSE/PARTNER FROM BUSINESS/FARM/REAL ESTATE COMBINED AMOUNT

ENTER NUMBER

Range 0 to 99999999

PROGRAMMER INSTRUCTIONS:

Range: \$0-\$99,999,999
Do not display the phrase 'Enter Number'.
If IA47A = 0-99999999, go to BOX IA50.

IA47B

ia5breijtest

R5 IA47B EST JNT BUS RE INC LSYR

QUESTION TEXT:

SHOW CARD IA28

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

CODES

1	LESS THAN \$3,600	IA50
2	\$3,600 TO LESS THAN \$12,000	IA50
3	\$12,000 TO LESS THAN \$25,000	IA50
4	\$25,000 TO LESS THAN \$64,000	IA50
5	\$64,000 OR MORE	IA50
	REFUSED	IA50

DON'T KNOW

IA50

IA48A

ia5breispamt

R5 IA48A AMT SP BUS RE INC LS YR

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES), display "you".
Otherwise, display "SP".

Display "In the last year" in underlined text.

QUESTION TEXT:

In the last year altogether, how much income did {you/SP} receive from these businesses or property before any federal or state taxes were taken out?

IF NEEDED: We don't need an exact dollar amount.

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 SP BUSINESS/FARM/REAL ESTATE AMOUNT

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 IA48A = 0-99999999, go to BOX IA49A.

IA48B

ia5breispest

R5 IA48B EST SP BUS RE INC LS YR

QUESTION TEXT:

SHOW CARD IA29

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

CODES

- 1 LESS THAN \$3,600
- 2 \$3,600 TO LESS THAN \$7,200
- 3 \$7,200 TO LESS THAN \$14,000
- 4 \$14,000 TO LESS THAN \$38,000
- 5 \$38,000 OR MORE
- REFUSED
- DON'T KNOW

BOX IA49A

BOXIA49A

NOT ON FILE

If IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IA49A.
Otherwise, go to IA50.

IA49A**ia5breiptamt**

R5 IA49A PART BUS RE INC LS YR

DISPLAY INSTRUCTIONS:

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

Display "in the last year" in underlined text.

QUESTION TEXT:

In the last year altogether, how much income did {you/{SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive from these businesses or property before any federal or state taxes were taken out?

IF NEEDED: We don't need an exact dollar amount.

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 SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE AMOUNT

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 IA49A = 0-99999999, go to BOX IA50.

IA49B**ia5breiptest**

R5 IA49B EST PRT BS RE INC LS YR

QUESTION TEXT:

SHOW CARD IA29

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

CODES

1 LESS THAN \$3,600
 2 \$3,600 TO LESS THAN \$7,200
 3 \$7,200 TO LESS THAN \$14,000
 4 \$14,000 TO LESS THAN \$38,000
 5 \$38,000 OR MORE
 REFUSED
 DON'T KNOW

IA50**ia5totincjt**

R5 IA50 JOINT TOTAL INCOME

ia5toincimjf

R5 F IMPUTED JOINT TOTAL INC FLG

ia5toincimj1

R5 IA50 IMPUTED JOINT TOTAL INC1

ia5toincimj2

R5 IA50 IMPUTED JOINT TOTAL INC2

ia5toincimj3

R5 IA50 IMPUTED JOINT TOTAL INC3

ia5toincimj4

R5 IA50 IMPUTED JOINT TOTAL INC4

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 CO]

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 = 0-99,999,999, go to Section CO.

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

ia5toincesjt
ia5eincimjf
ia5eincimj1
ia5eincimj2
ia5eincimj3
ia5eincimj4
ia5eincimj5

R5 IA51A JOINT EST TOT INCOME
R5 F IMPTD JOINT EST TOT INC FLG
R5 IA51A IMP EST JOINT TOT INC1
R5 IA51A IMP EST JOINT TOT INC2
R5 IA51A IMP EST JOINT TOT INC3
R5 IA51A IMP EST JOINT TOT INC4
R5 IA51A IMP EST JOINT TOT INC5

QUESTION TEXT:

SHOW CARD IA30

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

CODES

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

IA51B

ia5toincessg
ia5eincimsf
ia5eincims1
ia5eincims2
ia5eincims3
ia5eincims4
ia5eincims5

R5 IA51B SINGLE EST TOT INC
R5 F IMPUTED SGL EST TOT INC FLG
R5 IA51B IMP EST SP SGL TOT INC1
R5 IA51B IMP EST SP SGL TOT INC2
R5 IA51B IMP EST SP SGL TOT INC3
R5 IA51B IMP EST SP SGL TOT INC4
R5 IA51B IMP EST SP SGL TOT INC5

QUESTION TEXT:

SHOW CARD IA31

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 CO – Car Ownership.
