

NHATS Round 1

Section IA [INCOME AND ASSETS]

Sequence: 40

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

ia1recsspa1

R1 IA1 SP REC SOCIAL SECURITY

ia1recsspa2

R1 IA1 SPOUSE PART REC SOC SEC

ia1recsspa3

R1 IA1 NO SOC SECURITY PAYMNT REC

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If HH1 = 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 HH1 = 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 bold 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})?

IF NEEDED: These checks are either automatically deposited in the bank or mailed to arrive on the 3rd of every month. If mailed, they are often sent in gold or manila-colored envelopes.

{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 | IA4 |
| | REFUSED | IA4 |
| | DON'T KNOW | IA4 |

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 NE 1 (SP PAYMENT), go to IA4.
Otherwise, go to IA2.

IA2

ia1howrecssp

R1 IA2 HOW REC SOC SEC PAY

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), display "Do you".
Otherwise, display "Does SP".

QUESTION TEXT:

{Do you/Does SP} get Social Security checks through the mail, or use direct deposit to a bank account?

CODES

- 1 MAIL
- 2 DIRECT DEPOSIT
REFUSED
DON'T KNOW

IA3A

ia1msrtrecss (Sensitive)

R1 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

ia1yrstressp (Sensitive)

R1 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

ia1recssils1
ia1recssils2
ia1recssils3

R1 IA4 SP RECEIVD SSI LAST MONTH
R1 IA4 SPOUSE PRT REC SSI LST MO
R1 IA4 NO SSI RECEIVD LAST MONTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If HH1 = 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 HH1 = 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

ia1rvapayls1
ia1rvapayls2

R1 IA5 SP REC PAY FRM VA LAST MO
R1 IA5 SPOUS PA REC VA PAY LSTMO

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If HH1 = 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 HH1 = 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**ia1penjobou1**

R1 IA6 SP HAS PENSION PLAN

ia1penjobou2

R1 IA6 SPOUSE HAS PENSION PLAN

ia1penjobou3

R1 IA6 NO PENSION PLAN

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you".
Otherwise, display "Does SP".

If HH1 = 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 HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE".

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 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.

IA7	ia1iraothac1	R1 IA7 SP HAS IRA OTH RETIRE ACC
	ia1iraothac2	R1 IA7 SPOUSE HAS IRA OTHR ACC
	ia1iraothac3	R1 IA7 NO IRA OTHR RETIRE ACCT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you".
Otherwise, display "Does SP".

If HH1 = 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 HH1 = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER HAS 401K, 403B, IRA, OR KEOGH".

QUESTION TEXT:

SHOW CARD IA1

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

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

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

{SELECT ALL THAT APPLY}

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

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.

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

IA8	ia1mutfdstk1	R1 IA8 SP OWNS MUTUAL FUND STOCK
	ia1mutfdstk2	R1 IA8 SPOUSE OWNS FUNDS STOCK
	ia1mutfdstk3	R1 IA8 SP SPOUSE OWN FUNDS STOCK
	ia1mutfdstk4	R1 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 = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you" or "do you".
Otherwise, display "Does SP" or "does SP".

If HH1 = 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 HH1 = 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	ia1ownbond1	R1 IA9 SP OWNS BONDS
	ia1ownbond2	R1 IA9 SPOUSE OWNS BONDS
	ia1ownbond3	R1 IA9 SP SPOUSE OWN BONDS
	ia1ownbond4	R1 IA9 NO BONDS OWNED

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “do you”.
Otherwise, display “does SP”.

If HH1 = 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 HH1 = 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	ia1bnkaccdd1	R1 IA10 SP OWNS CHECK ACCT
	ia1bnkaccdd2	R1 IA10 SPOUSE OWNS CHECK ACCT
	ia1bnkaccdd3	R1 IA10 SP SPOUSE OWN CHECK ACCT

ia1bnkacccd4	R1 IA10 NO CHECK ACCT OWNED
ia1bnkacccd5	R1 IA10 SP OWNS SAVINGS ACCT
ia1bnkacccd6	R1 IA10 SPOUSE OWNS SAVING ACCT
ia1bnkacccd7	R1 IA10 SP SPOUSE OWN SAVNG ACT
ia1bnkacccd8	R1 IA10 NO SAVINGS ACCT OWNED
ia1bnkacccd9	R1 IA10 SP OWNS CDS
ia1bnkacccc10	R1 IA10 SPOUSE OWNS CDS
ia1bnkacccc11	R1 IA10 SP SPOUSE OWN CDS
ia1bnkacccc12	R1 IA10 NO CDS OWNED

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “do you”.
Otherwise, display “does SP”.

If HH1 = 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 HH1 = 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	ia1realestt1	R1 IA13 SP OWNS REAL ESTATE
	ia1realestt2	R1 IA13 SPOUSE OWNS REAL ESTATE
	ia1realestt3	R1 IA13 SP SPOUSE OWN REAL ESTTE
	ia1realestt4	R1 IA13 NO REAL ESTATE OWNED

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "do you".
Otherwise, display "does SP".

If HH1 = 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 HH1 = 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 {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.

IA14PRE

IA14PRE

NOT ON FILE

We now have a few questions about income 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

iassrrpymnt

R1 IA14 RECENT MTHLY SS RR PYMNT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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. The nearest \$100 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.

CODES

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

IA14A

ia1ssrrjtamt

R1 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

ia1ssrrjttest

R1 IA14B ESTMT JOINT SSRR AMOUNT

QUESTION TEXT:

SHOW CARD IA2

Was it...

CODES

1	less than \$1,200,	BOX IA17
2	\$1,200-\$1,599,	BOX IA17
3	\$1,600-\$1,999,	BOX IA17
4	\$2,000-\$2,499, or	BOX IA17
5	\$2,500 or more?	BOX IA17
	REFUSED	BOX IA17
	DON'T KNOW	BOX IA17

IA15A**ia1ssrrspamt**

R1 IA15A SP SS RR AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), 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. The nearest \$100 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 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**ia1ssrrspest**

R1 IA15B ESTIMATE SP SS RR AMT

QUESTION TEXT:

SHOW CARD IA3

Was it...

CODES

1	less than \$600,
2	\$600-\$899,
3	\$900-\$1,099,
4	\$1,100-\$1,499, or
5	\$1,500 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**ia1ssrrptamt**

R1 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. The nearest \$100 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 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**ia1ssrrptest**

R1 IA16B ESTIMT PARTNR SS RR AMT

QUESTION TEXT:

SHOW CARD IA3

Was it...

CODES

1 less than \$600,
 2 \$600-\$899,
 3 \$900-\$1,099,
 4 \$1,100-\$1,499, or
 5 \$1,500 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.

IA17**ia1ssipymnt**

R1 IA17 RECENT MTHLY SSI PAYMENT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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. The nearest \$100 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.

CODES

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

IA17A**ia1ssijtamt**

R1 IA17A JOINT SSI AMT

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER SSI AMOUNT

ENTER NUMBER

Range

1 to 9999

PROGRAMMER INSTRUCTIONS:

Do not display the phrase 'Enter Number'.
 If IA17A = 1-9999, go to BOX IA20.

IA17B**ia1ssijtest**

R1 IA17B ESTIMATE JOINT SSI AMT

QUESTION TEXT:

SHOW CARD IA4

Was it...

CODES

1	less than \$300,	BOX IA20
2	\$300-\$699,	BOX IA20
3	\$700-\$999, or	BOX IA20
4	\$1000 or more?	BOX IA20
	REFUSED	BOX IA20
	DON'T KNOW	BOX IA20

IA18A

ia1ssispamt

R1 IA18A SP SSI AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), 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. The nearest \$100 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 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

ia1ssipest

R1 IA8B ESTIMATE SP SSI AMOUNT

QUESTION TEXT:

SHOW CARD IA5

Was it...

CODES

1 less than \$100,
2 \$100-\$199,
3 \$200-\$399,
4 \$400-\$699, or
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.

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. The nearest \$100 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 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.

QUESTION TEXT:

SHOW CARD IA5

Was it...

CODES

1 less than \$100,
2 \$100-\$199,
3 \$200-\$399,
4 \$400-\$699, or
5 \$700 or more?
REFUSED
DON'T KNOW

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**ia1vapymnt**

R1 IA20 RECENT MNTHLY VA PAYMENT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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 Veteran's Administration payment (for the month of {CURRENT MONTH - 1})?

IF NEEDED: We don't need an exact dollar amount. The nearest \$100 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.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY REFUSED DON'T KNOW	IA21A IA20B IA20B

IA20A**ia1vajtamt**

R1 IA20A JOINT VA AMOUNT

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER VA AMOUNT

ENTER NUMBER

Range

1 to 9999

PROGRAMMER INSTRUCTIONS:

Do not display the phrase 'Enter Number'.
 If IA20A = 1-9999, go to BOX IA23.

IA20B**ia1vajtest**

R1 IA20B ESTIMAT JOINT VA AMOUNT

QUESTION TEXT:

SHOW CARD IA6

Was it...

CODES

1	less than \$600,	BOX IA23
2	\$600-\$799,	BOX IA23
3	\$800-\$999,	BOX IA23
4	\$1,000-\$1,199, or	BOX IA23
5	\$1,200 or more?	BOX IA23

REFUSED
DON'T KNOW

BOX IA23
BOX IA23

IA21A

ia1vaspamt

R1 IA21A SP VA AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), 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. The nearest \$100 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 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

ia1vaspest

R1 IA21B ESTIMATE SP VA AMOUNT

QUESTION TEXT:

SHOW CARD IA7

Was it...

CODES

- 1 less than \$500,
 - 2 \$500-\$699,
 - 3 \$700-\$899,
 - 4 \$900-\$1,099, or
 - 5 \$1,100 or more?
- REFUSED
DON'T KNOW

BOX IA22A

BOXIA22A

NOT ON FILE

If IA20 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA22a.
Otherwise, go to BOX IA23.

IA22A**ia1vaptamt**

R1 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. The nearest \$100 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 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**ia1vaptest**

R1 IA22B ESTIMATE PARTNR VA AMT

QUESTION TEXT:

SHOW CARD IA7

Was it...

CODES

1	less than \$500,
2	\$500-\$699,
3	\$700-\$899,
4	\$900-\$1,099, or
5	\$1,100 or more?
	REFUSED
	DON’T KNOW

BOX IA23**BOXIA23**

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.

IA23**ia1penpymt**

R1 IA23 RCNT MTH JOBPENSION PYMT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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. The nearest \$100 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.

CODES

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

IA23A**ia1penjtamt**

R1 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**ia1penjtest**

R1 IA23B EST JOINT JOB PENSN AMT

QUESTION TEXT:

SHOW CARD IA8

Was it...

CODES

1	less than \$600,	BOX IA26
2	\$600-\$1,099,	BOX IA26
3	\$1,100-\$2,099,	BOX IA26
4	\$2,100-\$4,499, or	BOX IA26

5

\$4,500 or more?
REFUSED
DON'T KNOW

BOX IA26
BOX IA26
BOX IA26

IA24A

ia1penspamt

R1 IA24A SP JOB PENSION AMOUNT

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), 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. The nearest \$100 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 SP 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 IA24A = 1-9999, go to BOX IA25a.

IA24B

ia1penspest

R1 IA24B EST SP JOB PENSION AMT

QUESTION TEXT:

SHOW CARD IA9

Was it...

CODES

1 less than \$400,
2 \$400-\$799,
3 \$800-\$1,499,
4 \$1,500-\$3,399, or
5 \$3,400 or more?
REFUSED
DON'T KNOW

If IA23 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA25a.
Otherwise, go to BOX IA26.

IA25A

ia1pentamt

R1 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. The nearest \$100 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 SPOUSE/PARTNER PENSION PLAN AMOUNT

ENTER NUMBER

Range 1 to 9999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Do not display the phrase 'Enter Number'.
If IA25A = 1-9999, go to BOX IA26.

IA25B

ia1penptest

R1 IA25B EST PARTNR JOB PEN AMT

QUESTION TEXT:

SHOW CARD IA9
Was it...

CODES

- 1 less than \$400,
 - 2 \$400-\$799,
 - 3 \$800-\$1,499,
 - 4 \$1,500-\$3,399, or
 - 5 \$3,400 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

ia1retworth

R1 IA26 RETIREMENT ACCOUNT WORTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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 Keough accounts.

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.

CODES

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

IA26a

ia1retjtwrt

R1 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**ia1retjtest**

R1 IA26B EST JOINT RET ACCT WRTH

QUESTION TEXT:

SHOW CARD IA10

Is it...

CODES

1	less than \$16,000,	BOX IA29
2	\$16,000-\$49,999,	BOX IA29
3	\$50,000-\$118,999,	BOX IA29
4	\$119,000-\$224,999, or	BOX IA29
5	\$225,000 or more?	BOX IA29
	REFUSED	BOX IA29
	DON'T KNOW	BOX IA29

IA27a**ia1retspwrt**

R1 IA27A SP RETIREMENT ACCT WRTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), 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 Keough accounts.

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 SP 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 IA27A = 1-999999, go to BOX IA28a.

QUESTION TEXT:

SHOW CARD IA11

Is it...

CODES

1	less than \$10,000,
2	\$10,000-\$27,999,
3	\$28,000-\$54,999,
4	\$55,000-\$143,999, or
5	\$144,000 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**ia1retptwrt**

R1 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 Keough accounts.

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 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.

QUESTION TEXT:

SHOW CARD IA11

Is it...

CODES

- | | |
|---|------------------------|
| 1 | less than \$10,000, |
| 2 | \$10,000-\$27,999, |
| 3 | \$28,000-\$54,999, |
| 4 | \$55,000-\$143,999, or |
| 5 | \$144,000 or more? |
| | REFUSED |
| | DON'T KNOW |

BOX IA29

BOXIA29

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

ia1rtlmwdrw

R1 IA29 RETRMNT WDRW AMT LST MTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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 bold 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. The nearest \$100 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.

CODES

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

IA29a**ia1rtlmjtwdr**

R1 IA29A JOINT RET WDRW LST MTH

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT AMOUNT

ENTER NUMBER

Range

1 to 9999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999

Do not display the phrase 'Enter Number'.

If IA29A = 1-9999, go to BOX IA32.

IA29b**ia1rtlmjtest**

R1 IA29B EST JONT RET WDR LS MTH

DISPLAY INSTRUCTIONS:

Display "last month" in underlined text.

QUESTION TEXT:

SHOW CARD IA12

For last month, was it...

CODES

1	less than \$200,	BOX IA32
2	\$200-\$299,	BOX IA32
3	\$300-\$699,	BOX IA32
4	\$700-\$1,499, or	BOX IA32
5	\$1,500 or more?	BOX IA32
	REFUSED	BOX IA32
	DON'T KNOW	BOX IA32

IA30a**ia1rtlmjpwdr**

R1 IA30A SP RET WDRWL LAST MONTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), 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. The nearest \$100 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 SP RETIREMENT ACCOUNT 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 IA30A = 1-9999, go to BOX IA31a.

IA30b

ia1rtlmspest

R1 IA30B EST SP RET WDR LST MNTH

DISPLAY INSTRUCTIONS:

Display "last month" in underlined text.

QUESTION TEXT:

SHOW CARD IA13
For last month, was it...

CODES

- 1 less than \$100,
 - 2 \$100-\$199,
 - 3 \$200-\$399,
 - 4 \$400-\$1,099, or
 - 5 \$1,100 or more?
- REFUSED
DON'T KNOW

BOX IA31a

BOXIA31a

NOT ON FILE

If IA29 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA31a.
Otherwise, go to BOX IA32.

IA31a

ia1rtlmpwdr

R1 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. The nearest \$100 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 SPOUSE/PARTNER RETIREMENT ACCOUNT 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 IA31A = 1-9999, go to BOX IA32.

IA31b

ia1rtlmpstest

R1 IA31B EST PARTNR WDR LST MTH

DISPLAY INSTRUCTIONS:

Display "last month" in underlined text.

QUESTION TEXT:

SHOW CARD IA13

For last month, was it...

CODES

- 1 less than \$100,
 - 2 \$100-\$199,
 - 3 \$200-\$399,
 - 4 \$400-\$1,099, or
 - 5 \$1,100 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

ia1rtyrwdrw

R1 IA32 RETRMNT WDRWL AMT LST YR

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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. The nearest \$100 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.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY	IA33A
	REFUSED	IA32B
	DON'T KNOW	IA32B

IA32a

ia1rtyrjtamt

R1 IA32A AMT JOINT RET WDR LS YR

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 IA32A = 1-9999999, go to BOX IA35.

IA32b

ia1rtyrjttest

R1 IA32B EST JOINT RET WDR LS YR

DISPLAY INSTRUCTIONS:

Display "last year" in underlined text.

QUESTION TEXT:

SHOW CARD IA14

For last year, was it...

CODES

1	less than \$2,400,	BOX IA35
2	\$2,400-\$3,599,	BOX IA35
3	\$3,600-\$8,399,	BOX IA35
4	\$8,400-\$17,999, or	BOX IA35
5	\$18,000 or more?	BOX IA35
	REFUSED	BOX IA35
	DON'T KNOW	BOX IA35

IA33a**ia1rtyrspamt**

R1 IA33A SP AMT RCWDR RET LS YR

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), 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. The nearest \$100 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 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 IA33A = 1-9999999, go to BOX IA34a.

IA33b**ia1rtyrspest**

R1 IA33B EST SP RCWDR RET LS YR

DISPLAY INSTRUCTIONS:

Display “last year” in underlined text.

QUESTION TEXT:

SHOW CARD IA15

For last year, was it...

CODES

1	less than \$1,200,
2	\$1,200-\$2,399,
3	\$2,400-\$4,799,
4	\$4,800-\$13,199, or
5	\$13,200 or more?
	REFUSED
	DON’T KNOW

If IA32 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IA34a.
 Otherwise, go to BOX IA35.

IA34a

ia1rtyrptamt

R1 IA34A PARTNR RCWDR 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. The nearest \$100 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 SPOUSE/PARTNER 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 IA34A = 1-9999999, go to BOX IA35.

IA34b

ia1rtyrptest

R1 IA34B EST PRTNR WDR RET LS YR

DISPLAY INSTRUCTIONS:

Display “last year” in underlined text.

QUESTION TEXT:

SHOW CARD IA15

For last year, was it...

CODES

- 1 less than \$1,200,
- 2 \$1,200-\$2,399,
- 3 \$2,400-\$4,799,
- 4 \$4,800-\$13,199, or
- 5 \$13,200 or more?

REFUSED
DON'T KNOW

BOX IA35

BOXIA35

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

ia1skbdwrth

R1 IA35 NONRETR STKS BNDS WRTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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. 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.

CODES

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

IA35a

ia1skbdjtwrt

R1 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

ia1skbdjtest

R1 IA35B EST JOINT STKS BNDS WRT

QUESTION TEXT:

SHOW CARD IA16

Is it...

CODES

1	less than \$62,000,	BOX IA38
2	\$62,000-\$85,999,	BOX IA38
3	\$86,000-\$149,999,	BOX IA38
4	\$150,000-\$434,999, or	BOX IA38
5	\$435,000 or more?	BOX IA38
	REFUSED	BOX IA38
	DON'T KNOW	BOX IA38

IA35c

ia1bndjtest

R1 IA35C EST JOINT ONLY BNDS WRT

QUESTION TEXT:

SHOW CARD IA17

Is it...

CODES

1	less than \$1,000,	BOX IA38
2	\$1,000-\$1,999,	BOX IA38
3	\$2,000-\$19,999,	BOX IA38
4	\$20,000-\$49,999, or	BOX IA38
5	\$50,000- or more?	BOX IA38
	REFUSED	BOX IA38
	DON'T KNOW	BOX IA38

IA36a

ia1skbdspwrt

R1 IA36A SP STKS BONDS WRTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), 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. 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 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.

BOX IA36b

BOXIA36b

NOT ON FILE

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

IA36b

ia1skbdspst

R1 IA36B EST SP STKS BNDS WRTH

QUESTION TEXT:

SHOW CARD IA18

Is it...

CODES

1	less than \$77,000,	BOX IA37A
2	\$77,000-\$79,999,	BOX IA37A
3	\$80,000-\$171,999,	BOX IA37A
4	\$172,000-\$199,999, or	BOX IA37A
5	\$200,000- or more?	BOX IA37A
	REFUSED	BOX IA37A
	DON'T KNOW	BOX IA37A

IA36c

ia1bndspst

R1 IA36C EST SP ONLY BNDS WRTH

QUESTION TEXT:

SHOW CARD IA19

Is it...

CODES

- 1 less than \$1,000,
 - 2 \$1,000-\$15,999,
 - 3 \$16,000-\$33,999,
 - 4 \$34,000-\$55,999, or
 - 5 \$56,000- or more?
- REFUSED
DON'T KNOW

BOX IA37a

BOXIA37a

NOT ON FILE

If IA8 = 2 (SPOUSE MUTUAL FUNDS) or IA9 = 2 (SPOUSE BONDS), go to IA37a.
Otherwise, go to BOX IA38.

IA37a

ia1skbdptwrt

R1 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. 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 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**ia1skbdptest**

R1 IA37B PART EST STKS BNDS WRTH

QUESTION TEXT:

SHOW CARD IA18

Is it...

CODES

1	less than \$77,000,	BOX IA38
2	\$77,000-\$79,999,	BOX IA38
3	\$80,000-\$171,999,	BOX IA38
4	\$172,000-\$199,999, or	BOX IA38
5	\$200,000- or more?	BOX IA38
	REFUSED	BOX IA38
	DON'T KNOW	BOX IA38

IA37c**ia1bndptest**

R1 IA37C PART EST ONLY BNDS WRTH

QUESTION TEXT:

SHOW CARD IA19

Is it...

CODES

1	less than \$1,000,
2	\$1,000-\$15,999,
3	\$16,000-\$33,999,
4	\$34,000-\$55,999, or
5	\$56,000- or more?
	REFUSED
	DON'T KNOW

BOX IA38**BOXIA38**

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.

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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. The nearest \$100 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.

CODES

1	ENTER COMBINED AMOUNT	
2	ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY	IA39A
	REFUSED	BOX IA38B
	DON'T KNOW	BOX IA38B

QUESTION TEXT:

ENTER COMBINED SP AND SPOUSE/PARTNER ACCOUNTS TOTAL AMOUNT

ENTER NUMBER

Range

1 to 999999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$999,999

Do not display the phrase 'Enter Number'.

If IA38A = 1-999,999, go to BOX IA41.

If IA10c = [1 (SP CDs) and 2 (SPOUSE CDs)] or 3 (JOINT CDs), go to IA38b.
 Otherwise, go to IA38c.

IA38b

ia1bkcdjtest

R1 IA38B EST JOINT BNK CD WRTH

QUESTION TEXT:

SHOW CARD IA20

Is it...

CODES

1	less than \$11,000,	BOX IA41
2	\$11,000-\$22,999,	BOX IA41
3	\$23,000-\$44,999,	BOX IA41
4	\$45,000-\$112,999, or	BOX IA41
5	\$113,000- or more?	BOX IA41
	REFUSED	BOX IA41
	DON'T KNOW	BOX IA41

IA38c

ia1bnkjtest

R1 IA38C EST JOINT BNK NO CD WRT

QUESTION TEXT:

SHOW CARD IA21

Is it...

CODES

1	less than \$1,000,	BOX IA41
2	\$1,000-\$5,999,	BOX IA41
3	\$6,000-\$13,999,	BOX IA41
4	\$14,000-\$35,999, or	BOX IA41
5	\$36,000- or more?	BOX IA41
	REFUSED	BOX IA41
	DON'T KNOW	BOX IA41

IA39a

ia1bkcdspwrt

R1 IA39A SP BNK CDS WORTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), 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. The nearest \$100 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 SP ACCOUNTS TOTAL 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 IA39A = 1-999,999, go to BOX IA40a.

BOX IA39b

BOXIA39b

NOT ON FILE

If IA10c = 1 (SP CDs), go to IA39b.
Otherwise, go to IA39c.

IA39b

ia1bkcdspest

R1 IA39B SP EST BNK ACCT CD WRTH

QUESTION TEXT:

SHOW CARD IA22

Is it...

CODES

1	less than \$10,000,	BOX IA40A
2	\$10,000-\$22,999,	BOX IA40A
3	\$23,000-\$55,999,	BOX IA40A
4	\$56,000-\$80,999, or	BOX IA40A
5	\$81,000 or more?	BOX IA40A
	REFUSED	BOX IA40A
	DON'T KNOW	BOX IA40A

IA39c

ia1bnkspst

R1 IA39C SP EST BNK NO CD WRTH

QUESTION TEXT:

SHOW CARD IA23

Is it...

CODES

- 1 less than \$600,
 - 2 \$600-\$999,
 - 3 \$1,000-\$2,999,
 - 4 \$3,000-\$10,999, or
 - 5 \$11,000 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

ia1bkcdptwrt

R1 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. The nearest \$100 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 SPOUSE/PARTNER ACCOUNTS TOTAL 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 IA40A = 1-999999, go to BOX IA41.

BOX IA40b**BOXIA40b**

NOT ON FILE

If IA10c = 2 (SPOUSE CDS), go to IA40b.
 Otherwise, go to IA40c.

IA40b**ia1bkcdptest**

R1 IA40B EST PARTNR BNK CD WRTH

QUESTION TEXT:

SHOW CARD IA22

Is it...

CODES

1	less than \$10,000,	BOX IA41A
2	\$10,000-\$22,999,	BOX IA41A
3	\$23,000-\$55,999,	BOX IA41A
4	\$56,000-\$80,999, or	BOX IA41A
5	\$81,000 or more?	BOX IA41A
	REFUSED	BOX IA41A
	DON'T KNOW	BOX IA41A

IA40c**ia1bnkptest**

R1 IA40C EST PART BNK NO CD WRTH

QUESTION TEXT:

SHOW CARD IA23

Is it...

CODES

1	less than \$600,
2	\$600-\$999,
3	\$1,000-\$2,999,
4	\$3,000-\$10,999, or
5	\$11,000 or more?
	REFUSED
	DON'T KNOW

BOX IA41**BOXIA41**

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.

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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. 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.

CODES

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

QUESTION TEXT:

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

ENTER NUMBER

Range 1 to 99999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$99,999
Do not display the phrase 'Enter Number'.
If IA41A = 1-99999, go to BOX IA44.

QUESTION TEXT:

SHOW CARD IA24

Was it...

CODES

1	less than \$500,	BOX IA44
2	\$500-\$999,	BOX IA44
3	\$1,000-\$3,999,	BOX IA44
4	\$4,000-\$15,999, or	BOX IA44
5	\$16,000 or more?	BOX IA44
	REFUSED	BOX IA44
	DON'T KNOW	BOX IA44

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), 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. 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 SP INTEREST AND DIVIDEND INCOME 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 IA42A = 1-9999, go to BOX IA43a.

IA42b

ia1itdvspst

R1 IA42B EST SP INTDIV INC LS YR

QUESTION TEXT:

SHOW CARD IA25

Was it...

CODES

- 1 less than \$200,
 - 2 \$200-\$999,
 - 3 \$1,000-\$3,999,
 - 4 \$4,000-\$6,999, or
 - 5 \$7,000 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 IA43a.
Otherwise, go to BOX IA44.

IA43a

ia1itdvptamt

R1 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 bold 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. 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 SPOUSE/PARTNER INTEREST AND DIVIDEND INCOME AMOUNT

ENTER NUMBER

Range
REFUSED

1 to 9999

DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$9,999

Do not display the phrase 'Enter Number'.

If IA43A = 1-9999, go to BOX IA44.

IA43b

ia1itdvpctest

R1 IA43B ESTPRT INT DV INC LS YR

QUESTION TEXT:

SHOW CARD IA25

Was it...

CODES

- | | |
|---|---------------------|
| 1 | less than \$200, |
| 2 | \$200-\$999, |
| 3 | \$1,000-\$3,999, |
| 4 | \$4,000-\$6,999, or |
| 5 | \$7,000 or more? |
| | REFUSED |
| | DON'T KNOW |

BOX IA44

BOXIA44

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

ia1brewrt

R1 IA44 BUSINESS REALESTATE WRTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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 real estate was sold today and then any debts on it were paid off, about how much would it bring?

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.

CODES

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

IA44a

ia1brejtwrt

R1 IA44A JOINT BUS REAL WRTH

QUESTION TEXT:

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

ENTER NUMBER

Range

1 to 99999999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$99,999,999
Do not display the phrase 'Enter Number'.
If IA44A = 1-99999999, go to BOX IA47.

IA44b

ia1brejtest

R1 IA44B EST JOINT BUS REAL WRTH

QUESTION TEXT:

SHOW CARD IA26

Would it be...

CODES

1	less than \$30,000,	BOX IA47
2	\$30,000-\$151,999,	BOX IA47
3	\$152,000-\$367,999,	BOX IA47
4	\$368,000-\$956,999, or	BOX IA47
5	\$957,000 or more?	BOX IA47
	REFUSED	BOX IA47
	DON'T KNOW	BOX IA47

IA45a

ia1brespwrt

R1 IA45A SP BUS REAL WRTH

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), 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 real estate was sold today and then any debts on it were paid off, about how much would it bring?

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 SP BUSINESS/FARM/REAL ESTATE AMOUNT

ENTER NUMBER

Range 1 to 99999999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$99,999,999
Do not display the phrase 'Enter Number'.
If IA45A = 1-99999999, go to BOX IA46a.

IA45b

ia1brespest

R1 IA45B EST SP BUS REAL WRTH

QUESTION TEXT:

SHOW CARD IA27

Would it be...

CODES

- 1 less than \$30,000,
 - 2 \$30,000-\$88,999,
 - 3 \$89,000-\$295,999,
 - 4 \$296,000-\$360,999, or
 - 5 \$361,000 or more?
- REFUSED
DON'T KNOW

BOX IA46a

BOXIA46a

NOT ON FILE

If IA13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IA46a.
Otherwise, go to BOX IA47.

IA46a

ia1breptwrt

R1 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 real estate was sold today and then any debts on it were paid off, about how much would it bring?

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 SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE AMOUNT

ENTER NUMBER

Range 1 to 99999999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$99,999,999
Do not display the phrase 'Enter Number'.
If IA46A = 1-99999999, go to BOX IA47.

IA46b

ia1breptest

R1 IA46B EST PART BUS RE WRTH

QUESTION TEXT:

SHOW CARD IA27

Would it be...

CODES

1 less than \$30,000,
2 \$30,000-\$88,999,
3 \$89,000-\$295,999,
4 \$296,000-\$360,999, or
5 \$361,000 or more?
REFUSED
DON'T KNOW

BOX IA47

BOXIA47

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

ia1breiinc

R1 IA47 BUS REALESTATE INC LS YR

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) 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. 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.

CODES

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

IA47a

ia1breijtamt

R1 IA47A JOINT BUS RE INC LS YR

QUESTION TEXT:

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

ENTER NUMBER

Range

1 to 99999999

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$99,999,999

Do not display the phrase 'Enter Number'.

If IA47A = 1-99999999, go to BOX IA50.

IA47b

ia1breijtest

R1 IA47B EST JNT BUS RE INC LSYR

QUESTION TEXT:

SHOW CARD IA28

Was it...

CODES

1	less than \$7,200,	IA50
2	\$7,200-\$16,799,	IA50
3	\$16,800-\$40,799,	IA50
4	\$40,800-\$86,399,	IA50
5	\$86,400 or more?	IA50
	REFUSED	IA50
	DON'T KNOW	IA50

IA48a**ia1breispamt**

R1 IA48A AMT SP BUS RE INC LS YR

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no), 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. 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 SP BUSINESS/FARM/REAL ESTATE AMOUNT

ENTER NUMBER

Range	1 to 99999999
REFUSED	
DON’T KNOW	

PROGRAMMER INSTRUCTIONS:

Range: \$1-\$99,999,999
 Do not display the phrase 'Enter Number'.
 If IA48A = 1-99999999, go to BOX IA49a.

IA48b**ia1breispest**

R1 IA48B EST SP BUS RE INC LS YR

QUESTION TEXT:

SHOW CARD IA29

Was it...

CODES

1	less than \$6,000,
2	\$6,000-11,999,
3	\$12,000-\$23,999,
4	\$24,000-\$47,999, or
5	\$48,000 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

ia1breiptamt

R1 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. 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 SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE AMOUNT

ENTER NUMBER

Range 1 to 99999999
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

Do not display the phrase 'Enter Number'.

If IA49A = 1-99999999, go to BOX IA50.

IA49b

ia1breiptest

R1 IA49B EST PRT BS RE INC LS YR

QUESTION TEXT:

SHOW CARD IA29

Was it...

CODES

1 less than \$6,000,
2 \$6,000-11,999,
3 \$12,000-\$23,999,
4 \$24,000-\$47,999, or
5 \$48,000 or more?
REFUSED
DON'T KNOW

IA50

ia1totinc

R1 IA50 TOTAL INCOME

ia1toincimf

R1 F IMPUTED TOTAL INC FLG

ia1toincim1

R1 IA50 IMPUTED TOTAL INC1

ia1toincim2

R1 IA50 IMPUTED TOTAL INC2

ia1toincim3

R1 IA50 IMPUTED TOTAL INC3

ia1toincim4

R1 IA50 IMPUTED TOTAL INC4

ia1toincim5

R1 IA50 IMPUTED TOTAL INC5

DISPLAY INSTRUCTIONS:

If PROXY flag = 2 (no) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "SP's".

If HH1 = 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

1 to 99999999

REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:

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

BOX IA51a

BOXIA51a

NOT ON FILE

If HH1=1 (MARRIED) or 2 (LIVING WITH A PARTNER), go to IA51a.
Otherwise, go to IA51b.

IA51a

ia1toincesjt

R1 IA51A JOINT EST TOT INCOME

ia1eincimjf

R1 F IMPTD JOINT EST TOT INC FLG

ia1eincimj1

R1 IA51A IMP EST JOINT TOT INC1

ia1eincimj2

R1 IA51A IMP EST JOINT TOT INC2

ia1eincimj3

R1 IA51A IMP EST JOINT TOT INC3

ia1eincimj4

R1 IA51A IMP EST JOINT TOT INC4

ia1eincimj5

R1 IA51A IMP EST JOINT TOT INC5

QUESTION TEXT:

SHOW CARD IA30

Was it...

CODES

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

IA51B

ia1toincessg

R1 IA51B SINGLE EST TOT INC

ia1eincimsf

R1 F IMPUTED SGL EST TOT INC FLG

ia1eincims1

R1 IA51B IMP EST SP SGL TOT INC1

ia1eincims2

R1 IA51B IMP EST SP SGL TOT INC2

ia1eincims3

R1 IA51B IMP EST SP SGL TOT INC3

ia1eincims4

R1 IA51B IMP EST SP SGL TOT INC4

ia1eincims5

R1 IA51B IMP EST SP SGL TOT INC5

QUESTION TEXT:

SHOW CARD IA31

Was it...

CODES

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

PROGRAMMER INSTRUCTIONS:

Go to Section CO – Car Ownership.
