

Well Being 124

IF (randomizer indicating whether respondent got the short or bare survey = Short survey) THEN

| **intro_returningshort** intro survey if answered any prior financial crisis questionnaire
| Since May 2009 we have been asking you every month about your health and economic well-being.
| Some of these monthly surveys are short (like February and March 2010) and some are long (like
| the last survey in April). The short surveys have been running a little over 13 minutes on
| average. The survey for this month is one of the shorter ones, but to reduce the burden on
| you we have cut the length of the short survey. We no longer ask about housing, mortgages,
| renting, credit cards and whether you have been affected by the crisis. We hope that you
| will like this shortened version of the survey!

| **intro_returningshort2** intro 2 survey if answered any prior financial crisis questionnaire
| Some questions ask what has happened since a certain date which was when we last asked you
| these questions. You will receive \$7 for completing the survey. We understand that some of
| these questions are of a personal nature. Please remember that your answers are extremely
| important to us. Your participation is voluntary and you may skip over any questions that you
| would prefer not to answer. Your responses are confidential, and it helps us a great deal if
| you respond as completely, honestly and accurately as possible. Thank you for your
| participation!

| **MS001** current marital situation
| What is your current marital situation?
| 1 Married
| 2 Marriage-like relationship
| 3 Separated
| 4 Divorced
| 5 Widowed
| 6 Never married

| IF current marital situation = Marriage-like relationship THEN

| | **MS001_b** planning financial future together
| | Are you and your partner planning your financial future together as a couple?
| | 1 Yes
| | 5 No

| ENDIF

| IF (current marital situation = Married OR current marital situation = Marriage-like
| relationship) THEN

| | **calcage_partner** respondent spouse/partner age
| | What is the age of your [spouse/partner]?
| | Range: 17.0..120.0

| ENDIF

| IF (current marital situation = Married OR current marital situation = Marriage-like
| relationship) THEN

| | **C001b** anybody else in HH spouse/partner

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| | Is anybody else other than your [spouse/partner] living with you (i.e. sharing the same
| | dwelling)?
| | 1 Yes
| | 5 No
| |
| | IF ( anybody else in HH spouse/partner = empty) THEN
| |
| | C001b_NR_DK anybody else in HH spouse/partner after nonresponse
| | [You did not answer. Your answers are important to us. Please answer the question to the
| | best of your ability.] Is anybody else other than your [spouse/partner] living with you
| | (i.e. sharing the same dwelling)?
| | 1 Yes
| | 5 No
| | 8 Don't know
| |
| | ELSE
| |
| | ENDIF
| |
| ELSE
| |
| | C001a anybody else in HH single
| | Is anybody else living with you (i.e. sharing the same dwelling)?
| | 1 Yes
| | 5 No
| |
| | IF ( anybody else in HH single = empty) THEN
| |
| | C001a_NR_DK anybody else in HH single after nonresponse
| | [You did not answer. Your answers are important to us. Please answer the question to the
| | best of your ability.] Is anybody else living with you (i.e. sharing the same dwelling)?
| | 1 Yes
| | 5 No
| | 8 Don't know
| |
| | ELSE
| |
| | ENDIF
| |
| ENDIF
|
| IF ( anybody else in HH single = Yes OR anybody else in HH single after nonresponse = Yes
| OR anybody else in HH spouse/partner = Yes OR anybody else in HH spouse/partner after
| nonresponse = Yes ) THEN
|
| [The following questions are displayed as a table]
|
| C002Intro HH composition intro
| Please indicate the number of persons living with you who are related to you either by
| marriage, blood or adoption, including stepchildren. Not including myself [or your spouse
| partner] there are:
|
| C002Below19 HH composition younger than 19
| Please indicate the number of persons living with you who are related to you either by

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marriage, blood or adoption, including stepchildren. Not including myself [or your spouse partner] there are:

Integer

C002From19to64 HH composition between 19 and 64

Please indicate the number of persons living with you who are related to you either by marriage, blood or adoption, including stepchildren. Not including myself [or your spouse partner] there are:

Integer

C002OlderThan65 HH composition older than 65

Please indicate the number of persons living with you who are related to you either by marriage, blood or adoption, including stepchildren. Not including myself [or your spouse partner] there are:

Integer

C002End HH composition end

(Please enter 0 if no other person of that age group resides with you.)

[End of table display]

ENDIF

LS001 life satisfaction as a whole

To begin with, we have some general questions about your life. Taking all things together, how satisfied are you with your life as a whole these days?

1 Very satisfied

2 Satisfied

3 Neither satisfied nor dissatisfied

4 Dissatisfied

5 Very dissatisfied

VS301_intro job satisfaction

How satisfied are you with your job or other daily activities?

1 Very satisfied

2 Satisfied

3 Neither satisfied nor dissatisfied

4 Dissatisfied

5 Very dissatisfied

LS002 total household income satisfaction

How satisfied are you with the total income of your household?

1 Very satisfied

2 Satisfied

3 Neither satisfied nor dissatisfied

4 Dissatisfied

5 Very dissatisfied

LS003 economic situation satisfaction

How satisfied are you with your overall economic situation?

1 Very satisfied

2 Satisfied

3 Neither satisfied nor dissatisfied

4 Dissatisfied

5 Very dissatisfied

| **C901_** health condition

| Would you say your health is excellent, very good, good, fair, or poor?

- | 1 Excellent
- | 2 Very good
- | 3 Good
- | 4 Fair
- | 5 Poor

| **HH003** difficulties sleeping none to severe

| Overall in the last 30 days, how much difficulty did you have sleeping, such as falling asleep, waking up frequently during the night or waking up too early in the morning?

- | 1 None
- | 2 Some
- | 3 Moderate
- | 4 Severe
- | 5 Extreme

| **HH004** depression problems none to severe

| Overall in the last 30 days, how much of a problem did you have with feeling sad, low, or depressed?

- | 1 None
- | 2 Some
- | 3 Moderate
- | 4 Severe
- | 5 Extreme

| **RH009_intro** how you have felt last 30 days

| The following two questions ask about how often you have felt certain ways during the past 30 days. For each question, please give the one answer that comes closest to describing your situation.

| **RH009_g** felt wornout

| During the past 30 days, how much of the time have you felt worn out?

- | 1 All of the time
- | 2 Most of the time
- | 3 A good bit of the time
- | 4 Some of the time
- | 5 A little of the time
- | 6 None of the time

| **RH009_h** been a happy person

| During the past 30 days, how much of the time have you been a happy person?

- | 1 All of the time
- | 2 Most of the time
- | 3 A good bit of the time
- | 4 Some of the time
- | 5 A little of the time
- | 6 None of the time

| **HB001** health ins coverage

| We would like to find out about your own health insurance situation[] Are you currently covered by health insurance? [fill for health insurance through partner]

| 1 Yes

| 5 No

| IF (health ins coverage = empty) THEN

|| **HB001_NR_DK** health ins coverage after nonresponse

|| [You did not answer. Your answers are important to us. Please answer the question to the best of your ability.] We would like to find out about your own health insurance situation[]

|| Are you currently covered by health insurance? [fill for health insurance through partner]

|| 1 Yes

|| 5 No

|| 8 Don't know

| ELSE

| ENDIF

| IF (current marital situation = Married OR current marital situation = Marriage-like relationship) THEN

|| **HB006** sp/ptner health ins coverage

|| Is your [spouse/partner] currently covered by health insurance? Please include any coverage that may come from your own employment.

|| 1 Yes

|| 5 No

|| IF (sp/ptner health ins coverage = empty) THEN

||| **HB006_NR_DK** sp/ptner health ins coverage after nonresponse

||| [You did not answer. Your answers are important to us. Please answer the question to the best of your ability.] Is your [spouse/partner] currently covered by health insurance?

||| Please include any coverage that may come from your own employment.

||| 1 Yes

||| 5 No

||| 8 Don't know

|| ELSE

|| ENDIF

| ENDIF

| **LF001** current job status

| What is your current employment situation? Please check all that apply.

| 1 Working for pay now

| 2 Unemployed and looking for work

| 3 Temporarily laid off

| 4 On sick or other leave

| 5 Disabled

| 6 Retired

| 7 Homemaker

| 8 Self-employed

| 9 Student

| 10 Other

| **I001** R any income from work last month
| Did you [yourself] receive any income from work during the month of [current month]? Please
| include wage, salary or self-employment income, as well as tips and bonuses.

| 1 Yes

| 5 No

| IF (R any income from work last month = empty) THEN

| | **I001_NR_DK** R any income from work last month after nonresponse
| | [You did not answer. Your answers are important to us. Please answer the question to the
| | best of your ability.] Did you [yourself] receive any income from work during the month of
| | [current month]? Please include wage, salary or self-employment income, as well as tips and
| | bonuses.

| | 1 Yes

| | 5 No

| | 8 Don't know

| ELSE

| ENDIF

| IF (R any income from work last month = Yes OR R any income from work last month after
| nonresponse = Yes) THEN

| | **I002** R income from work last month amt

| | How much was your total income from work in the month of [current month], before taxes and
| | other deductions? If you had more than one job then please report the total from all
| | jobs. [Please do not include your [partner/spouse]'s income from work. We will ask about
| | that separately.]

| | Integer

| IF (R income from work last month amt = empty) THEN

| | **I002_NR_DK** R income from work last month amt after nonresponse
| | [You did not answer. Your answers are important to us. Please answer the question to the
| | best of your ability.] How much was your total income from work in the month of [current
| | month], before taxes and other deductions? If you had more than one job then please
| | report the total from all jobs. [Please do not include your [partner/spouse]'s income from
| | work. We will ask about that separately.]

| | 1 < \$1,000

| | 2 \$1,000 - \$1,999

| | 3 \$2,000 - \$2,999

| | 4 \$3,000 - \$3,999

| | 5 \$4,000 - \$4,999

| | 6 \$5,000 - \$6,999

| | 7 \$7,000 - \$9,999

| | 8 \$10,000 or more

| | 98 Don't know

| ELSE

| ENDIF

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| ENDIF
|
| IF ( current marital situation = Married OR current marital situation = Marriage-like
| relationship ) THEN
|
| | I003 spouse any income from work last month
| | Did your [spouse/partner] receive any income from work during the month of [current month]?
| | Please include wage, salary or self-employment income, as well as tips and bonuses.
| | 1 Yes
| | 5 No
| |
| | IF ( spouse any income from work last month = empty) THEN
| | |
| | | I003_NR_DK spouse any income from work last month after nonresponse
| | | [You did not answer. Your answers are important to us. Please answer the question to the
| | | best of your ability.] Did your [spouse/partner] receive any income from work during the
| | | month of [current month]? Please include wage, salary or self-employment income, as well
| | | as tips and bonuses.
| | | 1 Yes
| | | 5 No
| | | 8 Don't know
| | |
| | | ELSE
| | |
| | | ENDIF
| |
| | IF ( spouse any income from work last month = Yes OR spouse any income from work last
| | month after nonresponse = Yes ) THEN
| | |
| | | I004 spouse income from work last month amt
| | | How much was your [spouse/partner]'s total income from work in the month of [current
| | | month] before taxes and other deductions? If your [spouse/partner] had more than one
| | | job then please report the total from all jobs.
| | | Integer
| | |
| | | IF ( spouse income from work last month amt = empty) THEN
| | | |
| | | | I004_NR_DK spouse income from work last month amt after nonresponse
| | | | [You did not answer. Your answers are important to us. Please answer the question to the
| | | | best of your ability.] How much was your [spouse/partner]'s total income from work in
| | | | the month of [current month] before taxes and other deductions? If your [spouse
| | | | partner] had more than one job then please report the total from all jobs.
| | | | 1 < $1,000
| | | | 2 $1,000 - $1,999
| | | | 3 $2,000 - $2,999
| | | | 4 $3,000 - $3,999
| | | | 5 $4,000 - $4,999
| | | | 6 $5,000 - $6,999
| | | | 7 $7,000 - $9,999
| | | | 8 $10,000 or more
| | | | 98 Don't know
| | | |
| | | | ELSE
| | | |
| | | |

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||| ENDIF

|||

||| ENDIF

|||

||| ENDIF

|| **I005** HH - any other income last month

|| Did [you (and your spouse/partner)] receive any other income in the month of [current month]?

|| 1 Yes

|| 5 No

|| IF (HH - any other income last month = empty) THEN

|||

||| **I005_NR_DK** HH - any other income last month after nonresponse

||| [You did not answer. Your answers are important to us. Please answer the question to the

||| best of your ability.] Did [you (and your spouse/partner)] receive any other income in the

||| month of [current month]?

||| 1 Yes

||| 5 No

||| 8 Don't know

||| ELSE

|||

||| ENDIF

|| IF (HH - any other income last month = Yes OR HH - any other income last month after

|| nonresponse = Yes) THEN

|||

||| **I005a** HH - total other income last month

||| Taking together all other sources of income that [you (and your spouse/partner)] may have

||| received in the month of [current month]: How much would that amount to in total before

||| taxes and other deductions? [Please include any income from work that you may have reported

||| earlier./if married/partnered: for yourself and/or your [spouse/partner]]

||| Integer

|| IF (HH - total other income last month = empty) THEN

|||

||| **I005a_NR_DK** HH - total income last month after nonresponse

||| [You did not answer. Your answers are important to us. Please answer the question to the

||| best of your ability.] Taking together all other sources of income that [you (and your

||| spouse/partner)] may have received in the month of [current month]: How much would that

||| amount to in total before taxes and other deductions? [Please include any income from work

||| that you may have reported earlier./if married/partnered: for yourself and/or your [spouse

||| partner]]

||| 1 < \$2,000

||| 2 \$2,000 - \$3,999

||| 3 \$4,000 - \$5,999

||| 4 \$6,000 - \$7,999

||| 5 \$8,000 - \$9,999

||| 6 \$10,000 - \$14,999

||| 7 \$15,000 - \$19,999

||| 8 \$20,000 or more

||| 98 Don't know

|||


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|| ELSE
||
|| ENDIF
||
|| ENDIF
||
|| IF Working for pay now in current job status OR On sick or other leave in current job
|| status THEN
||
|| [Questions LF004_a to LF004_b are displayed as a table]
||
|| LF004_a loss of job chances
|| We are interested in the chances that you might lose your job or be permanently laid off.
|| On a scale from 0 percent to 100 percent where "0" means that you think there is
|| absolutely no chance, and "100" means that you think the event is absolutely sure to happen,
|| what are the chances that you will lose your job during the next 12 months?
|| Range: 0.0..100.0
||
|| LF004_b loss of job chances self-employed
|| We are interested in the chances that you might lose your job (or be permanently laid off).
|| On a scale from 0 percent to 100 percent where "0" means that you think there is
|| absolutely no chance, and "100" means that you think the event is absolutely sure to happen,
|| what are the chances that you will lose your job during the next 12 months?
|| 1 Self-employed, not relevant
||
|| IF ( loss of job chances != empty AND loss of job chances self-employed != empty) THEN
||
|| checkqandself check display for giving answer to question and checking selfemployed box
|| You entered an answer to the question AND checked the box 'Self-employed, not relevant'.
|| Please go back and keep only the one entry that best describes your situation.
||
|| ENDIF
||
|| IF loss of job chances = empty AND loss of job chances self-employed = empty THEN
||
|| [Questions LF004_a_NR_SP to LF004_b_NR_DK are displayed as a table]
||
|| LF004_a_NR_SP loss of job chances after non-response
|| [You did not answer. Your answers are important to us. Please give us your best guess.] We
|| are interested in the chances that you might lose your job or be permanently laid off.
|| On a scale from 0 percent to 100 percent where "0" means that you think there is
|| absolutely no chance, and "100" means that you think the event is absolutely sure to
|| happen, what are the chances that you will lose your job during the next 12 months?
|| Range: 0.0..100.0
||
|| LF004_b_NR_DK loss of job chances self-employed after nonresponse DK
|| [You did not answer. Your answers are important to us. Please give us your best guess.] We
|| are interested in the chances that you might lose your job or be permanently laid off.
|| On a scale from 0 percent to 100 percent where "0" means that you think there is
|| absolutely no chance, and "100" means that you think the event is absolutely sure to
|| happen, what are the chances that you will lose your job during the next 12 months?
|| 1 Self-employed, not relevant
|| 8 Don't know
||

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|| IF ( loss of job chances after non-response != empty AND loss of job chances
|| self-employed after nonresponse DK != empty) THEN
|| |
|| | checkqandselfdk check display for giving answer to question and checking selfemployed/DK box
|| | You entered an answer to the question AND checked one of the check boxes. Please go back
|| | and keep only the one entry that best describes your situation.
|| |
|| | ENDIF
|| |
|| IF ( Self-employed, not relevant in loss of job chances self-employed after nonresponse
|| DK AND Don't know in loss of job chances self-employed after nonresponse DK ) THEN
|| |
|| | checkselfanddk check display for giving answer by checking two checkboxes
|| | You checked the box 'Self employed, not relevant' as well as the box 'Don't know'.
|| | Please go back and keep only the one entry that best describes your situation.
|| |
|| | ENDIF
|| |
|| ELSE
|| |
|| | ENDIF
|| |
|| ENDIF
||
|| IF Unemployed and looking for work IN current job status THEN
|| |
|| | LF020_u unemployed and chances of finding acceptable job over next 12 months
|| | On a scale from 0 percent to 100 percent where "0" means that you think there is absolutely
|| | no chance, and "100" means that you think the event is absolutely sure to happen, what are
|| | the chances that over the next 6 months you will find a job that you would accept
|| | considering the pay and the type of work?
|| | Range: 0.0..100.0
|| |
|| | IF unemployed and chances of finding acceptable job over next 12 months = empty THEN
|| | |
|| | | [Questions LF020_u_NR_SP to LF020_u_NR_DK are displayed as a table]
|| | |
|| | | LF020_u_NR_SP unemployed and chances of finding acceptable job over next 12 months after nonresponse
|| | | [You did not answer. Your answers are important to us. Please give us your best guess.] On
|| | | a scale from 0 percent to 100 percent where "0" means that you think there is absolutely
|| | | no chance, and "100" means that you think the event is absolutely sure to happen, what are
|| | | the chances that over the next 6 months you will find a job that you would accept
|| | | considering the pay and the type of work?
|| | | Range: 0.0..100.0
|| | |
|| | | LF020_u_NR_DK dont know unemployed and chances of finding acceptable job over next 12 months after
|| | | nonresponse
|| | | [You did not answer. Your answers are important to us. Please give us your best guess.] On
|| | | a scale from 0 percent to 100 percent where "0" means that you think there is absolutely
|| | | no chance, and "100" means that you think the event is absolutely sure to happen, what are
|| | | the chances that over the next 6 months you will find a job that you would accept
|| | | considering the pay and the type of work?
|| | | 8 Don't know
|| | |
|| | |

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|| IF ( unemployed and chances of finding acceptable job over next 12 months after
|| nonresponse != empty AND dont know unemployed and chances of finding acceptable job over
|| next 12 months after nonresponse != empty) THEN
|| |
|| | checkqanddk check display for giving answer to question and checking dont know box
|| | You entered an answer to the question AND checked the box 'Don't know'. Please go back
|| | and keep only the one entry that best describes your situation.
|| |
|| | ENDIF
|| |
|| ELSE
|| |
|| ENDIF
||
| ENDIF
|
| IF ( current marital situation = Married OR current marital situation = Marriage-like
| relationship ) THEN
| |
| | LF002 spouse's current employment status
| | We would also like to know about your [spouse/partner]'s current employment situation, What
| | is the current employment situation of your [spouse/partner]? Please check all that apply.
| | 1 Working for pay now
| | 2 Unemployed and looking for work
| | 3 Temporarily laid off
| | 4 On sick or other leave
| | 5 Disabled
| | 6 Retired
| | 7 Homemaker
| | 8 Self-employed
| | 9 Student
| | 10 Other
| |
| | IF Working for pay now in spouse's current employment status OR On sick or other leave
| | in spouse's current employment status THEN
| | |
| | | [Questions LF006_a to LF006_b are displayed as a table]
| | |
| | | LF006_a loss of job chances spouse
| | | On a scale from 0 percent to 100 percent where "0" equals absolutely no chance and "100"
| | | equals absolutely certain, what are the chances that your [spouse/partner] will lose his
| | | or her job during the next 12 months?
| | | Range: 0.0..100.0
| | |
| | | LF006_b loss of job chances spouse/partner self-employed
| | | On a scale from 0 percent to 100 percent where "0" equals absolutely no chance and "100"
| | | equals absolutely certain, what are the chances that your [spouse/partner] will lose his
| | | or her job during the next 6 months?
| | | 1 Self-employed, not relevant
| | |
| | | IF ( loss of job chances spouse != empty AND loss of job chances spouse/partner
| | | self-employed != empty) THEN
| | | |
| | | | checkqandself check display for giving answer to question and checking selfemployed box

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| | | You entered an answer to the question AND checked the box 'Self-employed, not relevant'.
| | | Please go back and keep only the one entry that best describes your situation.
| | |
| | | ENDIF
| | |
| | | IF loss of job chances spouse = empty AND loss of job chances spouse/partner
| | | self-employed = empty THEN
| | |
| | | [Questions LF006_a_NR_SP to LF006_b_NR_DK are displayed as a table]
| | |
| | | LF006_a_NR_SP loss of job chances spouse after non-response
| | | [You did not answer. Your answers are important to us. Please give us your best guess.]
| | | On a scale from 0 percent to 100 percent where "0" equals absolutely no chance and "100"
| | | equals absolutely certain, what are the chances that your [spouse/partner] will lose his
| | | or her job during the next 12 months?
| | | Range: 0.0..100.0
| | |
| | | LF006_b_NR_DK loss of job chances spouse/partner self-employed after nonresponse DK
| | | [You did not answer. Your answers are important to us. Please give us your best guess.]
| | | On a scale from 0 percent to 100 percent where "0" equals absolutely no chance and "100"
| | | equals absolutely certain, what are the chances that your [spouse/partner] will lose his
| | | or her job during the next 6 months?
| | | 1 Self-employed, not relevant
| | | 8 Don't know
| | |
| | | IF ( loss of job chances spouse after non-response != empty AND loss of job chances
| | | spouse/partner self-employed after nonresponse DK != empty) THEN
| | |
| | | | checkqandselfdk check display for giving answer to question and checking selfemployed/DK box
| | | | You entered an answer to the question AND checked one of the check boxes. Please go
| | | | back and keep only the one entry that best describes your situation.
| | | |
| | | | ENDIF
| | | |
| | | IF ( Self-employed, not relevant in loss of job chances spouse/partner self-employed
| | | after nonresponse DK AND Don't know in loss of job chances spouse/partner
| | | self-employed after nonresponse DK ) THEN
| | |
| | | | checkselfanddk check display for giving answer by checking two checkboxes
| | | | You checked the box 'Self employed, not relevant' as well as the box 'Don't know'.
| | | | Please go back and keep only the one entry that best describes your situation.
| | | |
| | | | ENDIF
| | | |
| | | ELSE
| | |
| | | ENDIF
| | |
| | ENDIF
| |
| ENDIF
|
| RA001 any retirement saving accounts.
| We are interested in how people save for retirement. Do [you and/or your spouse/partner] have

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| any IRA, 401(k), Keogh or similar retirement saving accounts? Please include any such accounts
| that [you and/or your spouse/partner] have through [your (and/or your [spouse's/partner's])]
| employer.

| 1 Yes

| 5 No

| IF (any retirement saving accounts. = empty) THEN

|| **RA001_NR_DK** any retirement saving accounts after nonresponse

|| [You did not answer. Your answers are important to us. Please answer the question to the
|| best of your ability.] We are interested in how people save for retirement. Do [you and/or
|| your spouse/partner] have any IRA, 401(k), Keogh or similar retirement saving accounts?
|| Please include any such accounts that [you and/or your spouse/partner] have through [your
|| (and/or your [spouse's/partner's])] employer.

|| 1 Yes

|| 5 No

|| 8 Don't know

| ELSE

| ENDIF

| IF (any retirement saving accounts. = Yes OR any retirement saving accounts after
| nonresponse = Yes) THEN

|| **RA016** moved assets in retirement accounts

|| Not counting any new contributions to these retirement accounts: since [time frame reference
|| for when last taken RA015-RA020 questions], have [you and/or your spouse/partner] moved any
|| assets into or out of stocks or stock mutual funds within your retirement accounts?

|| 1 [Fill for RA016] **only** moved assets **into** stocks (i.e. increased the amount invested in stocks by this move)

|| 2 [Fill for RA016] **only** moved assets **out** of stocks (i.e. decreased the amount invested in stocks by this move)

|| 3 Both. [Fill for RA016] moved **more** funds **into** stocks than out of stocks

|| 4 Both. [Fill for RA016] moved **more** funds **out** of stocks than into stocks

|| 5 No, [Fill for RA016] did not move any assets into or out of stocks within retirement accounts

|| IF (moved assets in retirement accounts = empty) THEN

|| **RA016_NR_DK** moved assets in retirement accounts after nonresponse

|| [You did not answer. Your answers are important to us. Please answer the question to the
|| best of your ability.] Not counting any new contributions to these retirement accounts:
|| since [time frame reference for when last taken RA015-RA020 questions], have [you and/or
|| your spouse/partner] moved any assets into or out of stocks or stock mutual funds within
|| your retirement accounts?

|| 1 [Fill for RA016] **only** moved assets **into** stocks (i.e. increased the amount invested in stocks by this move)

|| 2 [Fill for RA016] **only** moved assets **out** of stocks (i.e. decreased the amount invested in stocks by this move)

|| 3 Both. [Fill for RA016] moved **more** funds **into** stocks than out of stocks

|| 4 Both. [Fill for RA016] moved **more** funds **out** of stocks than into stocks

|| 5 No, [Fill for RA016] did not move any assets into or out of stocks within retirement accounts

|| 8 Don't know

| ELSE

| ENDIF

```

|| IF ( moved assets in retirement accounts = ^FLRA016WeCAPS only moved assets into<
|| b> stocks (i.e. increased the amount invested in stocks by this move) OR moved assets in
|| retirement accounts after nonresponse = ^FLRA016WeCAPS only moved assets into
|| stocks (i.e. increased the amount invested in stocks by this move) ) THEN
|| |
|| | RA017 amount moved into stocks
|| | What was the total value of the funds that [you and/or your spouse/partner] moved into
|| | stocks since [time frame reference for when last taken RA015-RA020 questions]?
|| | Integer
|| |
|| | IF ( amount moved into stocks = empty) THEN
|| | |
|| | | RA017_NR_DK amount moved into stocks after nonresponse
|| | | [You did not answer. Your answers are important to us. Please answer the question to the
|| | | best of your ability.] What was the total value of the funds that [you and/or your
|| | | spouse/partner] moved into stocks since [time frame reference for when last taken
|| | | RA015-RA020 questions]?
|| | | 1 $0 - $5,000
|| | | 2 $5,001 - $10,000
|| | | 3 $10,001 - $25,000
|| | | 4 $25,001 - $50,000
|| | | 5 $50,001 - $100,000
|| | | 6 $100,001 - $250,000
|| | | 7 $250,001 - $500,000
|| | | 8 $500,001 - $1,000,000
|| | | 9 More than $1,000,000
|| | | 10 Don't know
|| | |
|| | | ELSE
|| | |
|| | | ENDIF
|| | |
|| | ELSEIF ( moved assets in retirement accounts = ^FLRA016WeCAPS only moved assets
|| | out of stocks (i.e. decreased the amount invested in stocks by this move) OR moved
|| | assets in retirement accounts after nonresponse = ^FLRA016WeCAPS only moved assets
|| | out of stocks (i.e. decreased the amount invested in stocks by this move) ) THEN
|| | |
|| | | RA018 amount moved out of stocks
|| | | What was the total value of the funds that [you and/or your spouse/partner] moved out of
|| | | stocks since [time frame reference for when last taken RA015-RA020 questions]?
|| | | Integer
|| | |
|| | | IF ( amount moved out of stocks = empty) THEN
|| | | |
|| | | | RA018_NR_DK amount moved out of stocks after nonresponse
|| | | | [You did not answer. Your answers are important to us. Please answer the question to the
|| | | | best of your ability.] What was the total value of the funds that [you and/or your
|| | | | spouse/partner] moved out of stocks since [time frame reference for when last taken
|| | | | RA015-RA020 questions]?
|| | | | 1 $0 - $5,000
|| | | | 2 $5,001 - $10,000
|| | | | 3 $10,001 - $25,000
|| | | | 4 $25,001 - $50,000
|| | | | 5 $50,001 - $100,000

```

```

||| 6 $100,001 - $250,000
||| 7 $250,001 - $500,000
||| 8 $500,001 - $1,000,000
||| 9 More than $1,000,000
||| 10 Don't know
|||
||| ELSE
|||
||| ENDIF
|||
||| ELSEIF ( moved assets in retirement accounts = Both. ^FLRA016WeCAPS moved more
||| funds into stocks than out of stocks OR moved assets in retirement accounts after
||| nonresponse = Both. ^FLRA016WeCAPS moved more funds into stocks than out
||| of stocks ) THEN
|||
||| RA019 both amount moved into stocks
||| How big was the difference (i.e. how much more did you move into stocks than what you
||| moved out since [time frame reference for when last taken RA015-RA020 questions])?
||| Integer
|||
||| IF ( both amount moved into stocks = empty) THEN
|||
||| RA019_NR_DK both amount moved into stocks after nonresponse
||| [You did not answer. Your answers are important to us. Please answer the question to the
||| best of your ability.] How big was the difference (i.e. how much more did you move into
||| stocks than what you moved out since [time frame reference for when last taken
||| RA015-RA020 questions])?
||| 1 $0 - $5,000
||| 2 $5,001 - $10,000
||| 3 $10,001 - $25,000
||| 4 $25,001 - $50,000
||| 5 $50,001 - $100,000
||| 6 $100,001 - $250,000
||| 7 $250,001 - $500,000
||| 8 $500,001 - $1,000,000
||| 9 More than $1,000,000
||| 10 Don't know
|||
||| ELSE
|||
||| ENDIF
|||
||| ELSEIF ( moved assets in retirement accounts = Both. ^FLRA016WeCAPS moved more
||| funds out of stocks than into stocks OR moved assets in retirement accounts after
||| nonresponse = Both. ^FLRA016WeCAPS moved more funds out of stocks than
||| into stocks ) THEN
|||
||| RA020 both amount moved out of stocks
||| How big was the difference (i.e. how much more did you move out of stocks than what you
||| moved in since [time frame reference for when last taken RA015-RA020 questions])?
||| Integer
|||
||| IF ( both amount moved out of stocks = empty) THEN

```

||| **RA020_NR_DK** both amount moved out of stocks after nonresponse
||| [You did not answer. Your answers are important to us. Please answer the question to the
||| best of your ability.] How big was the difference (i.e. how much more did you move out
||| of stocks than what you moved in since [time frame reference for when last taken
||| RA015-RA020 questions])?

- ||| 1 \$0 - \$5,000
- ||| 2 \$5,001 - \$10,000
- ||| 3 \$10,001 - \$25,000
- ||| 4 \$25,001 - \$50,000
- ||| 5 \$50,001 - \$100,000
- ||| 6 \$100,001 - \$250,000
- ||| 7 \$250,001 - \$500,000
- ||| 8 \$500,001 - \$1,000,000
- ||| 9 More than \$1,000,000
- ||| 10 Don't know

|||
||| ELSE

|||
||| ENDIF

|||
||| ENDIF

|||
||| ENDIF

|
| **ST001** have any shares of stock or stock mutual funds
| In the next set of questions we will ask you about stock holdings besides those that you may
| have already told us about. Do [you and/or your spouse/partner] have any shares of stock or
| stock mutual funds besides stock holdings that are part of an IRA, 401(k), Keogh or similar
| retirement accounts?

- | 1 Yes
- | 5 No

|
| IF have any shares of stock or stock mutual funds = empty THEN

|
| **ST001_NR_DK** have any shares of stock or stock mutual funds after nonresponse
| [You did not answer. Your answers are important to us. Please answer the question to the
| best of your ability.] In the next set of questions we will ask you about stock holdings
| besides those that you may have already told us about. Do [you and/or your spouse/partner]
| have any shares of stock or stock mutual funds besides stock holdings that are part of an
| IRA, 401(k), Keogh or similar retirement accounts?

- | 1 Yes
- | 5 No
- | 8 Don't know

|
| ELSE

|
| ENDIF

|
| **ST004** bought or sold any stock since ms83/ms74/oct 2008/since May 2009
| Since [time frame reference for ST00 questions], have [you and/or your spouse/partner] bought
| or sold any stock or stock mutual funds?

- | 1 Bought only
- | 2 Sold only
- | 3 Both bought and sold


```

| 4 Neither bought nor sold
|
| IF ( bought or sold any stock since ms83/ms74/oct 2008/since May 2009 = empty) THEN
|
| | ST004_NR_DK bought or sold any stock since ms83/ms74/oct 2008/since May 2009 after nonresponse
| | [You did not answer. Your answers are important to us. Please answer the question to the
| | best of your ability.] Since [time frame reference for ST00 questions], have [you and/or
| | your spouse/partner] bought or sold any stock or stock mutual funds?
| | 1 Bought only
| | 2 Sold only
| | 3 Both bought and sold
| | 4 Neither bought nor sold
| | 9 Don't know
| |
| ELSE
|
| ENDIF
|
| IF bought or sold any stock since ms83/ms74/oct 2008/since May 2009 = Bought only OR bought
| or sold any stock since ms83/ms74/oct 2008/since May 2009 after nonresponse = Bought only
| THEN
|
| | ST005 how much pay in total for stocks bought since october 1st/since MS74
| | How much did [you and/or your spouse/partner] pay in total for the stocks you bought since
| | [time frame reference for ST00 questions]?
| | Integer
| |
| IF how much pay in total for stocks bought since october 1st/since MS74 = empty THEN
|
| | | ST005_NR_DK how much pay in total for stocks bought since october 1st/since MS74 after nonresponse
| | | [You did not answer. Your answers are important to us. Please answer the question to the
| | | best of your ability.] How much did [you and/or your spouse/partner] pay in total for the
| | | stocks you bought since [time frame reference for ST00 questions]?
| | | 1 $0 - $5,000
| | | 2 $5,001 - $10,000
| | | 3 $10,001 - $25,000
| | | 4 $25,001 - $50,000
| | | 5 $50,001 - $100,000
| | | 6 $100,001 - $250,000
| | | 7 $250,001 - $500,000
| | | 8 $500,001 - $1,000,000
| | | 9 More than $1,000,000
| | | 10 Don't know
| | |
| | ELSE
| |
| | ENDIF
|
| ELSEIF bought or sold any stock since ms83/ms74/oct 2008/since May 2009 = Sold only OR
| bought or sold any stock since ms83/ms74/oct 2008/since May 2009 after nonresponse = Sold
| only THEN
|
| | ST006 how much receive in total for stocks bought since october 1st/since May 2009
| | How much money did [you and/or your spouse/partner] receive in total for the stocks you sold

```

```
|| since [time frame reference for ST00 questions]?
|| Integer
||
|| IF how much receive in total for stocks bought since october 1st/since May 2009 = empty THEN
||
|| | ST006_NR_DK how much receive in total for stocks bought since october 1st/since May 2009 after
nonresponse
|| | [You did not answer. Your answers are important to us. Please answer the question to the
|| | best of your ability.] How much money did [you and/or your spouse/partner] receive in
|| | total for the stocks you sold since [time frame reference for ST00 questions]?
|| | 1 $0 - $5,000
|| | 2 $5,001 - $10,000
|| | 3 $10,001 - $25,000
|| | 4 $25,001 - $50,000
|| | 5 $50,001 - $100,000
|| | 6 $100,001 - $250,000
|| | 7 $250,001 - $500,000
|| | 8 $500,001 - $1,000,000
|| | 9 More than $1,000,000
|| | 10 Don't know
||
|| ELSE
||
|| ENDIF
||
|| ELSEIF bought or sold any stock since ms83/ms74/oct 2008/since May 2009 = Both bought and
|| sold OR bought or sold any stock since ms83/ms74/oct 2008/since May 2009 after nonresponse
|| = Both bought and sold THEN
||
|| | ST007 bought and sold since october 2008/since May 2009 took out or put in
|| | Thinking both of what [you and/or your spouse/partner] bought and what [you and/or your
|| | spouse/partner] sold since [time frame reference for ST00 questions], did you overall take
|| | money out of the stock market or did you overall put money in?
|| | 1 Took out
|| | 2 Put in
|| | 3 Neither (purchases and sales were worth about the same)
||
|| IF bought and sold since october 2008/since May 2009 took out or put in = empty THEN
||
|| | ST007_NR_DK bought and sold since october 2008/since May 2009 took out or put in
|| | [You did not answer. Your answers are important to us. Please answer the question to the
|| | best of your ability.] Thinking both of what [you and/or your spouse/partner] bought and
|| | what [you and/or your spouse/partner] sold since [time frame reference for ST00
|| | questions], did you overall take money out of the stock market or did you overall put
|| | money in?
|| | 1 Took out
|| | 2 Put in
|| | 3 Neither (purchases and sales were worth about the same)
|| | 8 Don't know
||
|| ELSE
||
|| ENDIF
||
```

```

|| IF bought and sold since october 2008/since May 2009 took out or put in = Took out OR
|| bought and sold since october 2008/since May 2009 took out or put in = Took out THEN
||
|| ST007_a amount taken out of stock market since october 2008/may 2009
|| About how much in total did [you and/or your spouse/partner] take out of the stock market
|| since [time frame reference for ST00 questions]?
|| Integer
||
|| IF amount taken out of stock market since october 2008/may 2009 = empty THEN
||
|| ST007_a_NR_DK amount taken out of stock market after nonresponse since oct 2008/may 2009
|| [You did not answer. Your answers are important to us. Please answer the question to the
|| best of your ability.] About how much in total did [you and/or your spouse/partner] take
|| out of the stock market since [time frame reference for ST00 questions]?
|| 1 $0 - $5,000
|| 2 $5,001 - $10,000
|| 3 $10,001 - $25,000
|| 4 $25,001 - $50,000
|| 5 $50,001 - $100,000
|| 6 $100,001 - $250,000
|| 7 $250,001 - $500,000
|| 8 $500,001 - $1,000,000
|| 9 More than $1,000,000
|| 10 Don't know
||
|| ELSE
||
|| ENDIF
||
|| ELSEIF bought and sold since october 2008/since May 2009 took out or put in = Put in OR
|| bought and sold since october 2008/since May 2009 took out or put in = Put in THEN
||
|| ST007_b amount put in to stock market since oct 2008/may 2009
|| About how much in total did [you and/or your spouse/partner] put in to the stock market
|| since [time frame reference for ST00 questions]?
|| Integer
||
|| IF amount put in to stock market since oct 2008/may 2009 = empty THEN
||
|| ST007_b_NR_DK amount put in to the stock market since oct 2008/may 2009 after nonresponse
|| [You did not answer. Your answers are important to us. Please answer the question to the
|| best of your ability.] About how much in total did [you and/or your spouse/partner] put
|| in to the stock market since [time frame reference for ST00 questions]?
|| 1 $0 - $5,000
|| 2 $5,001 - $10,000
|| 3 $10,001 - $25,000
|| 4 $25,001 - $50,000
|| 5 $50,001 - $100,000
|| 6 $100,001 - $250,000
|| 7 $250,001 - $500,000
|| 8 $500,001 - $1,000,000
|| 9 More than $1,000,000
|| 10 Don't know
||

```

```

|| ELSE
|||
||| ENDIF
|||
||| ENDIF
|||
||| ENDIF
|||
| ST010 chance investment blue chips worth more year from now
| We are interested in how well you think the economy will do in the future. On a scale from
| 0 percent to 100 percent where "0" means that you think there is absolutely no chance, and
| "100" means that you think the event is absolutely sure to happen, what are the chances that
| by next year at this time mutual fund shares invested in blue chip stocks like those in the
| Dow Jones Industrial Average will be worth more than they are today?
| Range: 0.0..100.0
|
| IF chance investment blue chips worth more year from now = empty THEN
|
| [Questions ST010_NR_SP to ST010_NR_DK are displayed as a table]
|
| ST010_NR_SP chance investment blue chips worth more year from now after nonresponse
| [You did not answer. Your answers are important to us. Please give us your best guess.] We
| are interested in how well you think the economy will do in the future. On a scale from 0
| percent to 100 percent where "0" means that you think there is absolutely no chance, and
| "100" means that you think the event is absolutely sure to happen, what are the chances that
| by next year at this time mutual fund shares invested in blue chip stocks like those in the
| Dow Jones Industrial Average will be worth more than they are today?
| Range: 0.0..100.0
|
| ST010_NR_DK chance investment blue chips worth more year from now after nonresponse DK
| [You did not answer. Your answers are important to us. Please give us your best guess.] We
| are interested in how well you think the economy will do in the future. On a scale from 0
| percent to 100 percent where "0" means that you think there is absolutely no chance, and
| "100" means that you think the event is absolutely sure to happen, what are the chances that
| by next year at this time mutual fund shares invested in blue chip stocks like those in the
| Dow Jones Industrial Average will be worth more than they are today?
| 8 Don't know
|
| IF ( chance investment blue chips worth more year from now after nonresponse != empty AND
| chance investment blue chips worth more year from now after nonresponse DK != empty) THEN
|
| | checkqanddk check display for giving answer to question and checking dont know box
| | You entered an answer to the question AND checked the box 'Don't know'. Please go back and
| | keep only the one entry that best describes your situation.
|
| ENDIF
|
| ELSE
|
| ENDIF
|
| IF chance investment blue chips worth more year from now = 50 OR chance investment blue
| chips worth more year from now after nonresponse = 50 THEN
|

```

```

| | ST011 chance investment blue chips worth more 50 percent
| | Do you think it is equally likely the shares will be worth more in a year as it is they will
| | be worth less or are you just unsure about the chances?
| | 1 Equally likely
| | 2 Unsure
| |
| | ENDIF
| |
| | IF chance investment blue chips worth more year from now > 0 OR chance investment blue
| | chips worth more year from now after nonresponse > 0 OR ( chance investment blue chips worth
| | more year from now = empty AND chance investment blue chips worth more year from now after
| | nonresponse = empty) THEN
| |
| | ST012 chance blue chip stocks gained more than 20 percent
| | By next year at this time, what are the chances that mutual fund shares invested in
| | blue-chip stocks like those in the Dow Jones Industrial Average will have increased in value
| | by more than 20 percent compared to what they are worth today?
| | Range: 0.0..100.0
| |
| | IF chance blue chip stocks gained more than 20 percent = empty THEN
| |
| | [Questions ST012_NR_SP to ST012_NR_DK are displayed as a table]
| |
| | ST012_NR_SP chance blue chip stocks gained more than 20 percent after nonresponse
| | [You did not answer. Your answers are important to us. Please give us your best guess.] By
| | next year at this time, what are the chances that mutual fund shares invested in blue-chip
| | stocks like those in the Dow Jones Industrial Average will have increased in value by more
| | than 20 percent compared to what they are worth today?
| | Range: 0.0..100.0
| |
| | ST012_NR_DK chance blue chip stocks gained more than 20 percent after nonresponse DK
| | [You did not answer. Your answers are important to us. Please give us your best guess.] By
| | next year at this time, what are the chances that mutual fund shares invested in blue-chip
| | stocks like those in the Dow Jones Industrial Average will have increased in value by more
| | than 20 percent compared to what they are worth today?
| | 8 Don't know
| |
| | IF ( chance blue chip stocks gained more than 20 percent after nonresponse != empty AND
| | chance blue chip stocks gained more than 20 percent after nonresponse DK != empty) THEN
| |
| | | | checkqanddk check display for giving answer to question and checking dont know box
| | | | You entered an answer to the question AND checked the box 'Don't know'. Please go back
| | | | and keep only the one entry that best describes your situation.
| | | |
| | | | ENDIF
| | | |
| | | | ELSE
| | | |
| | | | ENDIF
| | | |
| | | | ENDIF
| |
| | IF ( chance investment blue chips worth more year from now < 100 AND chance investment blue
| | chips worth more year from now != empty) OR ( chance investment blue chips worth more year

```

| from now after nonresponse < 100 AND chance investment blue chips worth more year from now
| after nonresponse != empty) OR (chance investment blue chips worth more year from now =
| empty AND chance investment blue chips worth more year from now after nonresponse = empty) OR
| (chance investment blue chips worth more year from now after nonresponse DK = Don't know)
| THEN

||
|| **ST013** chance blue chip stocks fallen more than 20 percent
|| By next year at this time, what are the chances that mutual fund shares invested in
|| blue-chip stocks like those in the Dow Jones Industrial Average will have fallen in value by
|| more than 20 percent compared to what they are worth today?
|| Range: 0.0..100.0

|| IF chance blue chip stocks fallen more than 20 percent = empty THEN

|| [Questions ST013_NR_SP to ST013_NR_DK are displayed as a table]

|| **ST013_NR_SP** chance blue chip stocks fallen more than 20 percent after nonresponse
|| [You did not answer. Your answers are important to us. Please give us your best guess.] By
|| next year at this time, what are the chances that mutual fund shares invested in blue-chip
|| stocks like those in the Dow Jones Industrial Average will have fallen in value by more
|| than 20 percent compared to what they are worth today?
|| Range: 0.0..100.0

|| **ST013_NR_DK** chance blue chip stocks fallen more than 20 percent after nonresponse DK
|| [You did not answer. Your answers are important to us. Please give us your best guess.] By
|| next year at this time, what are the chances that mutual fund shares invested in blue-chip
|| stocks like those in the Dow Jones Industrial Average will have fallen in value by more
|| than 20 percent compared to what they are worth today?
|| 8 Don't know

|| IF (chance blue chip stocks fallen more than 20 percent after nonresponse != empty AND
|| chance blue chip stocks fallen more than 20 percent after nonresponse DK != empty) THEN

|| **checkqanddk** check display for giving answer to question and checking dont know box
|| You entered an answer to the question AND checked the box 'Don't know'. Please go back
|| and keep only the one entry that best describes your situation.

|| ENDIF

|| ELSE

|| ENDIF

|| ENDIF

| **ST014** chance blue chip stocks worth more in 10 years time
| Now please think about how the stock market will change over the next 10 years: What are
| the chances that mutual fund shares invested in blue chip stocks like those in the Dow Jones
| Industrial Average will be worth more in 10 years than they are today?
| Range: 0.0..100.0

| IF chance blue chip stocks worth more in 10 years time = empty THEN

|| [Questions ST014_NR_SP to ST014_NR_DK are displayed as a table]

||
|| **ST014_NR_SP** chance blue chip stocks worth more in 10 years time after nonresponse
|| [You did not answer. Your answers are important to us. Please give us your best guess.] Now
|| please think about how the stock market will change over the next 10 years: What are the
|| chances that mutual fund shares invested in blue chip stocks like those in the Dow Jones
|| Industrial Average will be worth more in 10 years than they are today?
|| Range: 0.0..100.0
||

|| **ST014_NR_DK** chance blue chip stocks worth more in 10 years time after nonresponse DK
|| [You did not answer. Your answers are important to us. Please give us your best guess.] Now
|| please think about how the stock market will change over the next 10 years: What are the
|| chances that mutual fund shares invested in blue chip stocks like those in the Dow Jones
|| Industrial Average will be worth more in 10 years than they are today?
|| 8 Don't know
||

|| IF (chance blue chip stocks worth more in 10 years time after nonresponse != empty AND
|| chance blue chip stocks worth more in 10 years time after nonresponse DK != empty) THEN
||

|| **checkqanddk** check display for giving answer to question and checking dont know box
|| You entered an answer to the question AND checked the box 'Don't know'. Please go back and
|| keep only the one entry that best describes your situation.
||

|| ENDIF
||

|| ELSE
||

|| ENDIF
||

|| IF (chance blue chip stocks worth more in 10 years time = 50 OR chance blue chip stocks
|| worth more in 10 years time after nonresponse = 50) THEN
||

|| **ST014_a** equally chance blue chip stocks worth more/less in 10 years time
|| Do you think it is equally likely the shares will be worth more in 10 years as it is they
|| will be worth less or are you just unsure about the chances?
|| 1 Equally likely
|| 2 Unsure
||

|| IF equally chance blue chip stocks worth more/less in 10 years time = empty THEN
||

|| **ST014_a_NR_DK** equally chance blue chip stocks worth more/less in 10 years time after nonresponse
|| [You did not answer. Your answers are important to us. Please answer the question to the
|| best of your ability.] Do you think it is equally likely the shares will be worth more in
|| 10 years as it is they will be worth less or are you just unsure about the chances?
|| 1 Equally likely
|| 2 Unsure
|| 8 Don't know
||

|| ELSE
||

|| ENDIF
||

|| ENDIF
||

|| **IntroShort** intro to spending questions
||

| The next questions are about how much your household spent on certain items in the last
| calendar month (i.e. during the month of [holder for previous month name]). As you will see,
| the list does not cover all types of spending, only those that tend to be most frequent. In
| later surveys we will ask about additional types of spending, and you will have a chance to
| report about those less frequently purchased items. [(Click here for a list of spending
| categories that we DO NOT ask about in this survey.)/ (Click here for a list of spending
| categories that we ask about LATER IN THIS survey.)] Please provide your best estimate of how
| much in total your household spent in the described categories. Please include spending by all
| members of your household, that is, by you and anyone living with you. Even if the amount
| your household spent last calendar month was unusual, please report that amount.

| [Questions SP001 to B24_NA are displayed as a table]

| **SP001** short intro to mortgage, rent, utilities, car spending questions
| Mortgage, rent, utilities, car Please provide your best estimate of how much in total your
| household spent in the following categories. Please include spending by all members of your
| household, that is, by you and anyone living with you. Even if the amount your household
| spent last calendar month was unusual, please report that amount.

| **B18** mortgage spending
| Mortgage
| Integer

| **B18_NA** mortgage spending not applicable
| Mortgage not applicable
| 1 Not applicable

| **B19** rent spending
| Rent
| Integer

| **B19_NA** rent spending not applicable
| Rent not applicable
| 1 Not applicable

| **B20** electricity spending
| Electricity
| Integer

| **B20_NA** electricity spending not applicable
| Electricity not applicable
| 1 Not applicable

| **B21** water spending
| Water
| Integer

| **B21_NA** water spending not applicable
| Water not applicable
| 1 Not applicable

| **B22** heating fuel for the home spending
| Heating fuel for the home
| Integer

| **B22_NA** heating fuel for the home spending not applicable
| Heating fuel for the home not applicable
| 1 Not applicable

| **B23** telephone, cable, internet spending
| Telephone, cable, internet
| Integer

| **B23_NA** telephone, cable, internet spending not applicable
| Telephone, cable, internet not applicable
| 1 Not applicable

| **B24** car payments (interest and principal) spending
| Car payments: interest & principal
| Integer

| **B24_NA** car payments (interest and principle) spending not applicable
| Car payments not applicable: interest & principal
| 1 Not applicable

| IF (fill for spending table error answer categories != empty AND fill for spending table
| empty answer categories != empty) THEN

| | **checkemptyanddouble** check for if spending table answers contain both empty and double answers
| | You did not give an answer for: [fill for spending table empty answer categories] You also
| | entered both a dollar amount AND checked the 'no spending' box for: [fill for spending table
| | error answer categories] Your answers are important to us. Please try to answer as best you
| | can. If you would like to change your answers to the question please press the "Back"
| | button.

| ELSEIF (fill for spending table empty answer categories != empty) THEN

| | **checknoanswer** check for not giving answer for spending category
| | You did not give an answer for: [fill for spending table empty answer categories] Your
| | answers are important to us. Please try to answer as best you can. If you would like to
| | answer the question please press the "Back" button.

| ELSEIF (fill for spending table error answer categories != empty) THEN

| | **checkamandcheck** check for giving answer to both amount question and checkbox
| | You entered both a dollar amount AND checked the 'no spending' box for: [fill for spending
| | table error answer categories] Please go back and keep only the answer(s) that best
| | describes your situation.

| ENDIF

| [Questions SP006 to B42_NA are displayed as a table]

| **SP006** short intro to food in/out, gasoline spending questions
| Food, beverages and gasoline Please provide your best estimate of how much in total your
| household spent in the following categories. Please include spending by all members of your
| household, that is, by you and anyone living with you. Even if the amount your household

| spent last calendar month was unusual, please report that amount.

| **B40** food and beverages: food and drinks, including alcoholic, that you buy in grocery or other stores spending
| Food and beverages: food and drinks, including alcoholic, that you buy in grocery or other
| stores
| Integer

| **B40_NA** food and beverages not applicable: food and drinks, including alcoholic, that you buy in grocery or
| other stores spending
| Food and beverages not applicable: food and drinks, including alcoholic, that you buy in
| grocery or other stores
| 1 Not applicable

| **B41** dining and/or drinking out: items in restaurants, cafes, bars and diners, including take-out food spending
| Dining and/or drinking out: items in restaurants, cafes, bars and diners, including take-out
| food
| Integer

| **B41_NA** dining and/or drinking out: items in restaurants, cafes, bars and diners, including take-out food
| spending
| Dining and/or drinking out not applicable: items in restaurants, cafes, bars and diners,
| including take-out food
| 1 Not applicable

| **B42** gasoline spending
| Gasoline
| Integer

| **B42_NA** gasoline spending not applicable
| Gasoline not applicable
| 1 Not applicable

| IF (fill for spending table error answer categories != empty AND fill for spending table
| empty answer categories != empty) THEN

| | **checkemptyanddouble** check for if spending table answers contain both empty and double answers
| | You did not give an answer for: [fill for spending table empty answer categories] You also
| | entered both a dollar amount AND checked the 'no spending' box for: [fill for spending table
| | error answer categories] Your answers are important to us. Please try to answer as best you
| | can. If you would like to change your answers to the question please press the "Back"
| | button.

| ELSEIF (fill for spending table empty answer categories != empty) THEN

| | **checknoanswer** check for not giving answer for spending category
| | You did not give an answer for: [fill for spending table empty answer categories] Your
| | answers are important to us. Please try to answer as best you can. If you would like to
| | answer the question please press the "Back" button.

| ELSEIF (fill for spending table error answer categories != empty) THEN

| | **checkamandcheck** check for giving answer to both amount question and checkbox
| | You entered both a dollar amount AND checked the 'no spending' box for: [fill for spending

| table error answer categories] Please go back and keep only the answer(s) that best
| describes your situation.

|
| ENDIF

| [Questions SP002 to B28_NA are displayed as a table]

| **SP002** short intro to housekeeping, garden spending questions
| Housekeeping, garden Please provide your best estimate of how much in total your household
| spent in the following categories. Please include spending by all members of your household,
| that is, by you and anyone living with you. Even if the amount your household spent last
| calendar month was unusual, please report that amount.

| **B25** housekeeping supplies: cleaning and laundry products spending
| Housekeeping supplies: cleaning and laundry products
| Integer

| **B25_NA** housekeeping supplies not applicable: cleaning and laundry products spending
| Housekeeping supplies not applicable: cleaning and laundry products
| 1 Not applicable

| **B26** housekeeping, dry cleaning and laundry service spending
| Housekeeping, dry cleaning and laundry services: hiring costs for housekeeping or home
| cleaning, and amount spent at dry cleaners and laundries
| Integer

| **B26_NA** housekeeping, dry cleaning and laundry service spending not applicable
| Housekeeping, dry cleaning and laundry services not applicable: hiring costs for housekeeping
| or home cleaning, and amount spent at dry cleaners and laundries
| 1 Not applicable

| **B27** gardening and yard supplies: yard, lawn and garden products spending
| Gardening and yard supplies: yard, lawn and garden products
| Integer

| **B27_NA** gardening and yard supplies not applicable: yard, lawn and garden products spending
| Gardening and yard supplies not applicable: yard, lawn and garden products
| 1 Not applicable

| **B28** gardening and yard services: hiring costs including materials they provided spending
| Gardening and yard services: hiring costs including materials they provided
| Integer

| **B28_NA** gardening and yard services not applicable: hiring costs including materials they provided spending
| Gardening and yard services not applicable: hiring costs including materials they provided
| 1 Not applicable

| IF (fill for spending table error answer categories != empty AND fill for spending table
| empty answer categories != empty) THEN

| | **checkemptyanddouble** check for if spending table answers contain both empty and double answers
| | You did not give an answer for: [fill for spending table empty answer categories] You also
| | entered both a dollar amount AND checked the 'no spending' box for: [fill for spending table

| error answer categories] Your answers are important to us. Please try to answer as best you
| can. If you would like to change your answers to the question please press the "Back"
| button.

| ELSEIF (fill for spending table empty answer categories != empty) THEN

| **checknoanswer** check for not giving answer for spending category
| You did not give an answer for: [fill for spending table empty answer categories] Your
| answers are important to us. Please try to answer as best you can. If you would like to
| answer the question please press the "Back" button.

| ELSEIF (fill for spending table error answer categories != empty) THEN

| **checkamandcheck** check for giving answer to both amount question and checkbox
| You entered both a dollar amount AND checked the 'no spending' box for: [fill for spending
| table error answer categories] Please go back and keep only the answer(s) that best
| describes your situation.

| ENDIF

| [Questions SP003 to B33_NA are displayed as a table]

| **SP003** short intro to clothing, health spending questions
| Clothing, health Please provide your best estimate of how much in total your household
| spent in the following categories. Please include spending by all members of your household,
| that is, by you and anyone living with you. Even if the amount your household spent last
| calendar month was unusual, please report that amount.

| **B29** clothing and apparel: including footwear, outerwear, and products such as watches or jewelry spending
| Clothing and apparel: including footwear, outerwear, and products such as watches or jewelry
| Integer

| **B29_NA** clothing and apparel not applicable: including footwear, outerware, and products such as watches or
| jewelry spending
| Clothing and apparel not applicable: including footwear, outerware, and products such as
| watches or jewelry
| 1 Not applicable

| **B30** personal care products and services: including hair care, shaving and skin products, amount spent at hair
| dresser, manicure, etc. spending
| Personal care products and services: including hair care, shaving and skin products, amount
| spent at hair dresser, manicure, etc.
| Integer

| **B30_NA** personal care products and services not applicable: including hair care, shaving and skin products,
| amount spent at hair dresser, manicure, etc. spend
| Personal care products and services not applicable: including hair care, shaving and skin
| products, amount spent at hair dresser, manicure, etc.
| 1 Not applicable

| **B31** prescription and nonprescription medications: out-of-pocket cost, not including whats covered by insurance
| spending
| Prescription and nonprescription medications: out-of-pocket cost, not including what's covered
| by insurance

| Integer

| **B31_NA** prescription and nonprescription medications not applicable: out-of-pocket cost, not including whats covered by insur

| Prescription and nonprescription medications not applicable: out-of-pocket cost, not including what's covered by insurance

| 1 Not applicable

| **B32** health care services: out-of-pocket cost of hospital care, doctor services, lab tests, eye, dental, and nursing home care spending

| Health care services: out-of-pocket cost of hospital care, doctor services, lab tests, eye, dental, and nursing home care

| Integer

| **B32_NA** Health care services not applicable: out-of-pocket cost of hospital care, doctor services, lab tests, eye, dental, and nursing home care spending

| Health care services not applicable: out-of-pocket cost of hospital care, doctor services, lab tests, eye, dental, and nursing home care

| 1 Not applicable

| **B33** medical supplies: out-of-pocket cost, not including what's covered by insurance spending

| Medical supplies: out-of-pocket cost, not including what's covered by insurance

| Integer

| **B33_NA** Medical supplies not applicable: out-of-pocket cost, not including what's covered by insurance spending

| Medical supplies not applicable: out-of-pocket cost, not including what's covered by insurance

| 1 Not applicable

| IF (fill for spending table error answer categories != empty AND fill for spending table empty answer categories != empty) THEN

|| **checkemptyanddouble** check for if spending table answers contain both empty and double answers
|| You did not give an answer for: [fill for spending table empty answer categories] You also entered both a dollar amount AND checked the 'no spending' box for: [fill for spending table error answer categories] Your answers are important to us. Please try to answer as best you can. If you would like to change your answers to the question please press the "Back" button.

|| ELSEIF (fill for spending table empty answer categories != empty) THEN

|| **checknoanswer** check for not giving answer for spending category
|| You did not give an answer for: [fill for spending table empty answer categories] Your answers are important to us. Please try to answer as best you can. If you would like to answer the question please press the "Back" button.

|| ELSEIF (fill for spending table error answer categories != empty) THEN

|| **checkamandcheck** check for giving answer to both amount question and checkbox
|| You entered both a dollar amount AND checked the 'no spending' box for: [fill for spending table error answer categories] Please go back and keep only the answer(s) that best describes your situation.

| ENDIF

| [Questions SP004 to B36_NA are displayed as a table]

| **SP004** short intro to leisure spending questions

| Leisure Please provide your best estimate of how much in total your household spent in the
| following categories. Please include spending by all members of your household, that is, by
| you and anyone living with you. Even if the amount your household spent last calendar month
| was unusual, please report that amount.

| **B34** entertainment: tickets to movies, sporting events, performing arts, etc. spending

| Entertainment: tickets to movies, sporting events, performing arts, etc

| Integer

| **B34_NA** entertainment: tickets not applicable to movies, sporting events, performing arts, etc. spending

| Entertainment: tickets not applicable to movies, sporting events, performing arts, etc.

| 1 Not applicable

| **B35** sports: including gym, exercise equipment such as bicycles, skis, boats, etc. spending

| Sports: including gym, exercise equipment such as bicycles, skis, boats, etc.

| Integer

| **B35_NA** Sports not applicable: including gym, exercise equipment such as bicycles, skis, boats, etc. spending

| Sports not applicable: including gym, exercise equipment such as bicycles, skis, boats, etc.

| 1 Not applicable

| **B36** hobbies and leisure equipment: such as photography, stamps, reading materials, camping, etc. spending

| Hobbies and leisure equipment: such as photography, stamps, reading materials, camping, etc.

| Integer

| **B36_NA** hobbies and leisure equipment not applicable: such as photography, stamps, reading materials,
| camping, etc. spending

| Hobbies and leisure equipment not applicable: such as photography, stamps, reading materials,
| camping, etc.

| 1 Not applicable

| IF (fill for spending table error answer categories != empty AND fill for spending table

| empty answer categories != empty) THEN

| | **checkemptyanddouble** check for if spending table answers contain both empty and double answers

| | You did not give an answer for: [fill for spending table empty answer categories] You also
| | entered both a dollar amount AND checked the 'no spending' box for: [fill for spending table
| | error answer categories] Your answers are important to us. Please try to answer as best you
| | can. If you would like to change your answers to the question please press the "Back"
| | button.

| ELSEIF (fill for spending table empty answer categories != empty) THEN

| | **checknoanswer** check for not giving answer for spending category

| | You did not give an answer for: [fill for spending table empty answer categories] Your
| | answers are important to us. Please try to answer as best you can. If you would like to
| | answer the question please press the "Back" button.

| ELSEIF (fill for spending table error answer categories != empty) THEN

| |
| | **checkamandcheck** check for giving answer to both amount question and checkbox
| | You entered both a dollar amount AND checked the 'no spending' box for: [fill for spending
| | table error answer categories] Please go back and keep only the answer(s) that best
| | describes your situation.

| ENDIF

| [Questions SP005 to B39_NA are displayed as a table]

| **SP005** short intro to pers.serv, education, other child-rel spending questions
| Personal services, education, and other child-related spending Please provide your best
| estimate of how much in total your household spent in the following categories. Please include
| spending by all members of your household, that is, by you and anyone living with you. Even
| if the amount your household spent last calendar month was unusual, please report that amount.

| **B37** personal services: including cost of care for elderly and/or children, after-school activities spending
| Personal services: including cost of care for elderly and/or children, after-school activities

| Integer

| **B37_NA** personal services not applicable: including cost of day care, baby-sitters, after-school spending
| Personal Services not applicable: including cost of care for elderly and/or children,
| after-school activities

| 1 Not applicable

| **B38** education: including tuition, room and board, books and supplies spending
| Education: including tuition, room and board, books and supplies

| Integer

| **B38_NA** education not applicable: including tuition , room and board, books and supplies spending
| Education not applicable: including tuition, room and board, books and supplies

| 1 Not applicable

| **B39** other child-related spending, not yet reported: including gear and equipment, spending
| Other child-related spending, not yet reported: including toys, gear and equipment

| Integer

| **B39_NA** other child-related spending not applicable, not yet reported: including gear and equipment, spending
| Other child-related spending not applicable, not yet reported: including toys, gear and
| equipment

| 1 Not applicable

| IF (fill for spending table error answer categories != empty AND fill for spending table
| empty answer categories != empty) THEN

| |
| | **checkemptyanddouble** check for if spending table answers contain both empty and double answers
| | You did not give an answer for: [fill for spending table empty answer categories] You also
| | entered both a dollar amount AND checked the 'no spending' box for: [fill for spending table
| | error answer categories] Your answers are important to us. Please try to answer as best you
| | can. If you would like to change your answers to the question please press the "Back"

| button.

| ELSEIF (fill for spending table empty answer categories != empty) THEN

| **checknoanswer** check for not giving answer for spending category
| You did not give an answer for: [fill for spending table empty answer categories] Your
| answers are important to us. Please try to answer as best you can. If you would like to
| answer the question please press the "Back" button.

| ELSEIF (fill for spending table error answer categories != empty) THEN

| **checkamandcheck** check for giving answer to both amount question and checkbox
| You entered both a dollar amount AND checked the 'no spending' box for: [fill for spending
| table error answer categories] Please go back and keep only the answer(s) that best
| describes your situation.

| ENDIF

| [The following questions are displayed as a table]

| **FL_TotalText** total of spending

| \$ []

| String

| **summary_intro** intro to summary table

| According to your entries your household's spending in [holder for previous month name] on the
| described categories was: \$[]. Below is a summary of your entries. If you would like to make
| any changes to your entries, you can change the amounts in the table below and then click the
| 'Update total' button in the lower right corner of the screen to recalculate your total. Once
| you are satisfied with your entries, please just click 'Next'. [As a reminder, there are some
| categories of spending that we DID NOT ask you about in this survey, but we will ask these in
| a later survey. (Click here for a list of spending categories that we will ask in a later
| survey.)/As a reminder, there are some categories of spending that we HAVE NOT YET asked you
| about, but that we will ask you in the next set of questions in THIS SURVEY. (Click here for a
| list of spending categories that we will ask about in the next set of questions.)]

| **B18_confirm** summary mortgage spending

| Mortgage

| Integer

| **B19_confirm** summary rent spending

| Rent

| Integer

| **B20_confirm** summary electricity spending

| Electricity

| Integer

| **B21_confirm** summary water spending

| Water

| Integer

| **B22_confirm** summary heating fuel for the home spending

| Heating fuel for the home

| Integer

| **B23_confirm** summary telephone, cable, internet spending

| Telephone, cable, internet

| Integer

| **B24_confirm** summary car payments (interest and principal) spending

| Car payments

| Integer

| **B40_confirm** summary food and beverages: food and drinks, including alcoholic, that you buy in grocery or other stores spending

| Food and beverages

| Integer

| **B41_confirm** summary dining and/or drinking out: items in restaurants, cafes, bars and diners, including take-out food spending

| Dining and/or drinking out

| Integer

| **B42_confirm** summary gasoline spending

| Gasoline

| Integer

| **B25_confirm** summary housekeeping supplies: cleaning and laundry products spending

| Housekeeping supplies

| Integer

| **B26_confirm** summary housekeeping, dry cleaning and laundry service spending

| Housekeeping, dry cleaning and laundry services

| Integer

| **B27_confirm** summary gardening and yard supplies: yard, lawn and garden products spending

| Gardening and yard supplies

| Integer

| **B28_confirm** summary gardening and yard services: hiring costs including materials they provided spending

| Gardening and yard services

| Integer

| **B29_confirm** summary clothing and apparel: including footwear, outerware, and products such as watches or jewelry spending

| Clothing and apparel

| Integer

| **B30_confirm** summary personal care products and services: including hair care, shaving and skin products, amount spent at hair dresser, manicure, etc. spending

| Personal care products and services

| Integer

| **B31_confirm** summary prescription and nonprescription medications: out-of-pocket cost

| Prescription and nonprescription medications

| Integer

| **B32_confirm** summary health care services: out-of-pocket cost of hospital care, doctor services, lab tests, eye, dental, and nursing home care spending

| Health care services

| Integer

| **B33_confirm** summary medical supplies: out-of-pocket cost, not including what's covered by insurance spending

| Medical supplies

| Integer

| **B34_confirm** summary entertainment: tickets to movies, sporting events, performing arts, etc. spending

| Entertainment

| Integer

| **B35_confirm** summary sports: including gym, exercise equipment such as bicycles, skis, boats, etc. spending

| Sports

| Integer

| **B36_confirm** summary hobbies and leisure equipment: such as photography, stamps, reading materials, camping, etc. spending

| Hobbies and leisure equipment

| Integer

| **B37_confirm** summary personal services: including cost of day care, baby-sitters, after-school spending

| Personal services

| Integer

| **B38_confirm** summary education: including tuition , room and board, books and supplies spending

| Education

| Integer

| **B39_confirm** summary other child-related spending, not yet reported: including gear and equipment, spending

| Other child-related spending, not yet reported

| Integer

| [End of table display]

| **CS_001** HOW PLEASANT INTERVIEW

| Could you tell us how interesting or uninteresting you found the questions in this interview?

| 1 Very interesting

| 2 Interesting

| 3 Neither interesting nor uninteresting

| 4 Uninteresting

| 5 Very uninteresting

| **CS_003** comments

| Do you have any other comments on the interview? Please type these in the box below.

| Open

| EXIT

| ELSE

| **intro_returningbare** intro bare survey if answered any prior financial crisis questionnaire

| Since May 2009 we have been asking you every month about your health and economic well-being.

| Some of these monthly surveys are short (like February and March 2010) and some are long (like

| the last survey in April). The short surveys have been running a little over 13 minutes on
| average. The survey for this month is one of the shorter ones, but to reduce the burden on
| you we have cut the length of the short survey. We no longer ask about your health and
| well-being, health insurance coverage, chances of losing or finding a job, housing, mortgages,
| renting, credit cards and whether you have been affected by the crisis. We hope that you
| will like this shortened version of the survey!

| **intro_returningbare2** intro bare survey if answered any prior financial crisis questionnaire
| Some questions ask what has happened since a certain date which was when we last asked you
| these questions. You will receive \$5 for completing the survey. We understand that some of
| these questions are of a personal nature. Please remember that your answers are extremely
| important to us. Your participation is voluntary and you may skip over any questions that you
| would prefer not to answer. Your responses are confidential, and it helps us a great deal if
| you respond as completely, honestly and accurately as possible. Thank you for your
| participation!

| **MS001** current marital situation

| What is your current marital situation?

| 1 Married

| 2 Marriage-like relationship

| 3 Separated

| 4 Divorced

| 5 Widowed

| 6 Never married

| IF current marital situation = Marriage-like relationship THEN

| | **MS001_b** planning financial future together

| | Are you and your partner planning your financial future together as a couple?

| | 1 Yes

| | 5 No

| | ENDIF

| IF (current marital situation = Married OR current marital situation = Marriage-like
| relationship) THEN

| | **calcage_partner** respondent spouse/partner age

| | What is the age of your [spouse/partner]?

| | Range: 17.0..120.0

| | ENDIF

| IF (current marital situation = Married OR current marital situation = Marriage-like
| relationship) THEN

| | **C001b** anybody else in HH spouse/partner

| | Is anybody else other than your [spouse/partner] living with you (i.e. sharing the same
| dwelling)?

| | 1 Yes

| | 5 No

| | IF (anybody else in HH spouse/partner = empty) THEN

| | |

|| **C001b_NR_DK** anybody else in HH spouse/partner after nonresponse
|| [You did not answer. Your answers are important to us. Please answer the question to the
|| best of your ability.] Is anybody else other than your [spouse/partner] living with you
|| (i.e. sharing the same dwelling)?

|| 1 Yes
|| 5 No
|| 8 Don't know

||
|| ELSE
||
|| ENDIF

|| ELSE

|| **C001a** anybody else in HH single
|| Is anybody else living with you (i.e. sharing the same dwelling)?

|| 1 Yes
|| 5 No

|| IF (anybody else in HH single = empty) THEN

|| **C001a_NR_DK** anybody else in HH single after nonresponse
|| [You did not answer. Your answers are important to us. Please answer the question to the
|| best of your ability.] Is anybody else living with you (i.e. sharing the same dwelling)?

|| 1 Yes
|| 5 No
|| 8 Don't know

||
|| ELSE
||
|| ENDIF

|| ENDIF

|| IF (anybody else in HH single = Yes OR anybody else in HH single after nonresponse = Yes
|| OR anybody else in HH spouse/partner = Yes OR anybody else in HH spouse/partner after
|| nonresponse = Yes) THEN

|| [The following questions are displayed as a table]

|| **C002Intro** HH composition intro

|| Please indicate the number of persons living with you who are related to you either by
|| marriage, blood or adoption, including stepchildren. Not including myself [or your spouse
|| partner] there are:

|| **C002Below19** HH composition younger than 19

|| Please indicate the number of persons living with you who are related to you either by
|| marriage, blood or adoption, including stepchildren. Not including myself [or your spouse
|| partner] there are:

|| Integer

|| **C002From19to64** HH composition between 19 and 64

|| Please indicate the number of persons living with you who are related to you either by
|| marriage, blood or adoption, including stepchildren. Not including myself [or your spouse

```

| partner] there are:
| Integer
|
| C002OlderThan65 HH composition older than 65
| Please indicate the number of persons living with you who are related to you either by
| marriage, blood or adoption, including stepchildren. Not including myself [or your spouse
| partner] there are:
| Integer
|
| C002End HH composition end
| (Please enter 0 if no other person of that age group resides with you.)
|
| [End of table display]
| ENDIF
|
| LF001 current job status
| What is your current employment situation? Please check all that apply.
| 1 Working for pay now
| 2 Unemployed and looking for work
| 3 Temporarily laid off
| 4 On sick or other leave
| 5 Disabled
| 6 Retired
| 7 Homemaker
| 8 Self-employed
| 9 Student
| 10 Other
|
| I001 R any income from work last month
| Did you [yourself] receive any income from work during the month of [current month]? Please
| include wage, salary or self-employment income, as well as tips and bonuses.
| 1 Yes
| 5 No
|
| IF ( R any income from work last month = empty) THEN
|
| I001_NR_DK R any income from work last month after nonresponse
| [You did not answer. Your answers are important to us. Please answer the question to the
| best of your ability.] Did you [yourself] receive any income from work during the month of
| [current month]? Please include wage, salary or self-employment income, as well as tips and
| bonuses.
| 1 Yes
| 5 No
| 8 Don't know
|
| ELSE
|
| ENDIF
|
| IF ( R any income from work last month = Yes OR R any income from work last month after
| nonresponse = Yes ) THEN
|
| I002 R income from work last month amt
| How much was your total income from work in the month of [current month], before taxes and

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|| other deductions? If you had more than one job then please report the total from all
|| jobs. [Please do not include your [partner/spouse]'s income from work. We will ask about
|| that separately.]
|| Integer
||
|| IF ( R income from work last month amt = empty) THEN
||
|| I002_NR_DK R income from work last month amt after nonresponse
|| [You did not answer. Your answers are important to us. Please answer the question to the
|| best of your ability.] How much was your total income from work in the month of [current
|| month], before taxes and other deductions? If you had more than one job then please
|| report the total from all jobs. [Please do not include your [partner/spouse]'s income from
|| work. We will ask about that separately.]
|| 1 < $1,000
|| 2 $1,000 - $1,999
|| 3 $2,000 - $2,999
|| 4 $3,000 - $3,999
|| 5 $4,000 - $4,999
|| 6 $5,000 - $6,999
|| 7 $7,000 - $9,999
|| 8 $10,000 or more
|| 98 Don't know
||
|| ELSE
||
|| ENDIF
||
|| ENDIF
||
|| IF ( current marital situation = Married OR current marital situation = Marriage-like
|| relationship ) THEN
||
|| I003 spouse any income from work last month
|| Did your [spouse/partner] receive any income from work during the month of [current month]?
|| Please include wage, salary or self-employment income, as well as tips and bonuses.
|| 1 Yes
|| 5 No
||
|| IF ( spouse any income from work last month = empty) THEN
||
|| I003_NR_DK spouse any income from work last month after nonresponse
|| [You did not answer. Your answers are important to us. Please answer the question to the
|| best of your ability.] Did your [spouse/partner] receive any income from work during the
|| month of [current month]? Please include wage, salary or self-employment income, as well
|| as tips and bonuses.
|| 1 Yes
|| 5 No
|| 8 Don't know
||
|| ELSE
||
|| ENDIF
||
|| IF ( spouse any income from work last month = Yes OR spouse any income from work last

```

```

| | month after nonresponse = Yes ) THEN
| |
| | I004 spouse income from work last month amt
| | How much was your [spouse/partner]'s total income from work in the month of [current
| | month] before taxes and other deductions? If your [spouse/partner] had more than one
| | job then please report the total from all jobs.
| | Integer
| |
| | IF ( spouse income from work last month amt = empty) THEN
| |
| | I004_NR_DK spouse income from work last month amt after nonresponse
| | [You did not answer. Your answers are important to us. Please answer the question to the
| | best of your ability.] How much was your [spouse/partner]'s total income from work in
| | the month of [current month] before taxes and other deductions? If your [spouse
| | partner] had more than one job then please report the total from all jobs.
| | 1 < $1,000
| | 2 $1,000 - $1,999
| | 3 $2,000 - $2,999
| | 4 $3,000 - $3,999
| | 5 $4,000 - $4,999
| | 6 $5,000 - $6,999
| | 7 $7,000 - $9,999
| | 8 $10,000 or more
| | 98 Don't know
| |
| | ELSE
| |
| | ENDIF
| |
| | ENDIF
| |
| | ENDIF
| |
| | I005 HH - any other income last month
| | Did [you (and your spouse/partner)] receive any other income in the month of [current month]?
| | 1 Yes
| | 5 No
| |
| | IF ( HH - any other income last month = empty) THEN
| |
| | I005_NR_DK HH - any other income last month after nonresponse
| | [You did not answer. Your answers are important to us. Please answer the question to the
| | best of your ability.] Did [you (and your spouse/partner)] receive any other income in the
| | month of [current month]?
| | 1 Yes
| | 5 No
| | 8 Don't know
| |
| | ELSE
| |
| | ENDIF
| |
| | IF ( HH - any other income last month = Yes OR HH - any other income last month after
| | nonresponse = Yes ) THEN

```

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|
|
| I005a HH - total other income last month
| Taking together all other sources of income that [you (and your spouse/partner)] may have
| received in the month of [current month]: How much would that amount to in total before
| taxes and other deductions? [Please include any income from work that you may have reported
| earlier./if married/partnered: for yourself and/or your [spouse/partner]]
| Integer
|
| IF ( HH - total other income last month = empty) THEN
|
| I005a_NR_DK HH - total income last month after nonresponse
| [You did not answer. Your answers are important to us. Please answer the question to the
| best of your ability.] Taking together all other sources of income that [you (and your
| spouse/partner)] may have received in the month of [current month]: How much would that
| amount to in total before taxes and other deductions? [Please include any income from work
| that you may have reported earlier./if married/partnered: for yourself and/or your [spouse
| partner]]
| 1 < $2,000
| 2 $2,000 - $3,999
| 3 $4,000 - $5,999
| 4 $6,000 - $7,999
| 5 $8,000 - $9,999
| 6 $10,000 - $14,999
| 7 $15,000 - $19,999
| 8 $20,000 or more
| 98 Don't know
|
| ELSE
|
| ENDIF
|
| ENDIF
|
| IF ( current marital situation = Married OR current marital situation = Marriage-like
| relationship ) THEN
|
| LF002 spouse's current employment status
| We would also like to know about your [spouse/partner]'s current employment situation, What
| is the current employment situation of your [spouse/partner]? Please check all that apply.
| 1 Working for pay now
| 2 Unemployed and looking for work
| 3 Temporarily laid off
| 4 On sick or other leave
| 5 Disabled
| 6 Retired
| 7 Homemaker
| 8 Self-employed
| 9 Student
| 10 Other
|
| ENDIF
|
| RA001 any retirement saving accounts.
| We are interested in how people save for retirement. Do [you and/or your spouse/partner] have

```


| any IRA, 401(k), Keogh or similar retirement saving accounts? Please include any such accounts
| that [you and/or your spouse/partner] have through [your (and/or your [spouse's/partner's])]
| employer.

| 1 Yes

| 5 No

| IF (any retirement saving accounts. = empty) THEN

|| **RA001_NR_DK** any retirement saving accounts after nonresponse

|| [You did not answer. Your answers are important to us. Please answer the question to the
|| best of your ability.] We are interested in how people save for retirement. Do [you and/or
|| your spouse/partner] have any IRA, 401(k), Keogh or similar retirement saving accounts?
|| Please include any such accounts that [you and/or your spouse/partner] have through [your
|| (and/or your [spouse's/partner's])] employer.

|| 1 Yes

|| 5 No

|| 8 Don't know

| ELSE

| ENDIF

| IF (any retirement saving accounts. = Yes OR any retirement saving accounts after
| nonresponse = Yes) THEN

|| **RA016** moved assets in retirement accounts

|| Not counting any new contributions to these retirement accounts: since [time frame reference
|| for when last taken RA015-RA020 questions], have [you and/or your spouse/partner] moved any
|| assets into or out of stocks or stock mutual funds within your retirement accounts?

|| 1 [Fill for RA016] **only** moved assets **into** stocks (i.e. increased the amount invested in stocks by this move)

|| 2 [Fill for RA016] **only** moved assets **out** of stocks (i.e. decreased the amount invested in stocks by this move)

|| 3 Both. [Fill for RA016] moved **more** funds **into** stocks than out of stocks

|| 4 Both. [Fill for RA016] moved **more** funds **out** of stocks than into stocks

|| 5 No, [Fill for RA016] did not move any assets into or out of stocks within retirement accounts

|| IF (moved assets in retirement accounts = empty) THEN

|| **RA016_NR_DK** moved assets in retirement accounts after nonresponse

|| [You did not answer. Your answers are important to us. Please answer the question to the
|| best of your ability.] Not counting any new contributions to these retirement accounts:
|| since [time frame reference for when last taken RA015-RA020 questions], have [you and/or
|| your spouse/partner] moved any assets into or out of stocks or stock mutual funds within
|| your retirement accounts?

|| 1 [Fill for RA016] **only** moved assets **into** stocks (i.e. increased the amount invested in stocks by this move)

|| 2 [Fill for RA016] **only** moved assets **out** of stocks (i.e. decreased the amount invested in stocks by this move)

|| 3 Both. [Fill for RA016] moved **more** funds **into** stocks than out of stocks

|| 4 Both. [Fill for RA016] moved **more** funds **out** of stocks than into stocks

|| 5 No, [Fill for RA016] did not move any assets into or out of stocks within retirement accounts

|| 8 Don't know

| ELSE

| ENDIF

```

|| IF ( moved assets in retirement accounts = ^FLRA016WeCAPS only moved assets into<
|| b> stocks (i.e. increased the amount invested in stocks by this move) OR moved assets in
|| retirement accounts after nonresponse = ^FLRA016WeCAPS only moved assets into
|| stocks (i.e. increased the amount invested in stocks by this move) ) THEN
|| |
|| | RA017 amount moved into stocks
|| | What was the total value of the funds that [you and/or your spouse/partner] moved into
|| | stocks since [time frame reference for when last taken RA015-RA020 questions]?
|| | Integer
|| |
|| | IF ( amount moved into stocks = empty) THEN
|| | |
|| | | RA017_NR_DK amount moved into stocks after nonresponse
|| | | [You did not answer. Your answers are important to us. Please answer the question to the
|| | | best of your ability.] What was the total value of the funds that [you and/or your
|| | | spouse/partner] moved into stocks since [time frame reference for when last taken
|| | | RA015-RA020 questions]?
|| | | 1 $0 - $5,000
|| | | 2 $5,001 - $10,000
|| | | 3 $10,001 - $25,000
|| | | 4 $25,001 - $50,000
|| | | 5 $50,001 - $100,000
|| | | 6 $100,001 - $250,000
|| | | 7 $250,001 - $500,000
|| | | 8 $500,001 - $1,000,000
|| | | 9 More than $1,000,000
|| | | 10 Don't know
|| | |
|| | | ELSE
|| | |
|| | | ENDIF
|| | |
|| | ELSEIF ( moved assets in retirement accounts = ^FLRA016WeCAPS only moved assets
|| | out of stocks (i.e. decreased the amount invested in stocks by this move) OR moved
|| | assets in retirement accounts after nonresponse = ^FLRA016WeCAPS only moved assets
|| | out of stocks (i.e. decreased the amount invested in stocks by this move) ) THEN
|| | |
|| | | RA018 amount moved out of stocks
|| | | What was the total value of the funds that [you and/or your spouse/partner] moved out of
|| | | stocks since [time frame reference for when last taken RA015-RA020 questions]?
|| | | Integer
|| | |
|| | | IF ( amount moved out of stocks = empty) THEN
|| | | |
|| | | | RA018_NR_DK amount moved out of stocks after nonresponse
|| | | | [You did not answer. Your answers are important to us. Please answer the question to the
|| | | | best of your ability.] What was the total value of the funds that [you and/or your
|| | | | spouse/partner] moved out of stocks since [time frame reference for when last taken
|| | | | RA015-RA020 questions]?
|| | | | 1 $0 - $5,000
|| | | | 2 $5,001 - $10,000
|| | | | 3 $10,001 - $25,000
|| | | | 4 $25,001 - $50,000
|| | | | 5 $50,001 - $100,000

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```

||| 6 $100,001 - $250,000
||| 7 $250,001 - $500,000
||| 8 $500,001 - $1,000,000
||| 9 More than $1,000,000
||| 10 Don't know
|||
||| ELSE
|||
||| ENDIF
|||
||| ELSEIF ( moved assets in retirement accounts = Both. ^FLRA016WeCAPS moved more
||| funds into stocks than out of stocks OR moved assets in retirement accounts after
||| nonresponse = Both. ^FLRA016WeCAPS moved more funds into stocks than out
||| of stocks ) THEN
|||
||| RA019 both amount moved into stocks
||| How big was the difference (i.e. how much more did you move into stocks than what you
||| moved out since [time frame reference for when last taken RA015-RA020 questions])?
||| Integer
|||
||| IF ( both amount moved into stocks = empty) THEN
|||
||| RA019_NR_DK both amount moved into stocks after nonresponse
||| [You did not answer. Your answers are important to us. Please answer the question to the
||| best of your ability.] How big was the difference (i.e. how much more did you move into
||| stocks than what you moved out since [time frame reference for when last taken
||| RA015-RA020 questions])?
||| 1 $0 - $5,000
||| 2 $5,001 - $10,000
||| 3 $10,001 - $25,000
||| 4 $25,001 - $50,000
||| 5 $50,001 - $100,000
||| 6 $100,001 - $250,000
||| 7 $250,001 - $500,000
||| 8 $500,001 - $1,000,000
||| 9 More than $1,000,000
||| 10 Don't know
|||
||| ELSE
|||
||| ENDIF
|||
||| ELSEIF ( moved assets in retirement accounts = Both. ^FLRA016WeCAPS moved more
||| funds out of stocks than into stocks OR moved assets in retirement accounts after
||| nonresponse = Both. ^FLRA016WeCAPS moved more funds out of stocks than
||| into stocks ) THEN
|||
||| RA020 both amount moved out of stocks
||| How big was the difference (i.e. how much more did you move out of stocks than what you
||| moved in since [time frame reference for when last taken RA015-RA020 questions])?
||| Integer
|||
||| IF ( both amount moved out of stocks = empty) THEN

```

||| **RA020_NR_DK** both amount moved out of stocks after nonresponse
||| [You did not answer. Your answers are important to us. Please answer the question to the
||| best of your ability.] How big was the difference (i.e. how much more did you move out
||| of stocks than what you moved in since [time frame reference for when last taken
||| RA015-RA020 questions])?

- ||| 1 \$0 - \$5,000
- ||| 2 \$5,001 - \$10,000
- ||| 3 \$10,001 - \$25,000
- ||| 4 \$25,001 - \$50,000
- ||| 5 \$50,001 - \$100,000
- ||| 6 \$100,001 - \$250,000
- ||| 7 \$250,001 - \$500,000
- ||| 8 \$500,001 - \$1,000,000
- ||| 9 More than \$1,000,000
- ||| 10 Don't know

|||
||| ELSE
|||
||| ENDIF

|||
||| ENDIF
|||
||| ENDIF

| **ST001** have any shares of stock or stock mutual funds
| In the next set of questions we will ask you about stock holdings besides those that you may
| have already told us about. Do [you and/or your spouse/partner] have any shares of stock or
| stock mutual funds besides stock holdings that are part of an IRA, 401(k), Keogh or similar
| retirement accounts?

- | 1 Yes
- | 5 No

| IF have any shares of stock or stock mutual funds = empty THEN

|| **ST001_NR_DK** have any shares of stock or stock mutual funds after nonresponse
|| [You did not answer. Your answers are important to us. Please answer the question to the
|| best of your ability.] In the next set of questions we will ask you about stock holdings
|| besides those that you may have already told us about. Do [you and/or your spouse/partner]
|| have any shares of stock or stock mutual funds besides stock holdings that are part of an
|| IRA, 401(k), Keogh or similar retirement accounts?

- || 1 Yes
- || 5 No
- || 8 Don't know

|||
||| ELSE
|||
||| ENDIF

| **ST004** bought or sold any stock since ms83/ms74/oct 2008/since May 2009
| Since [time frame reference for ST00 questions], have [you and/or your spouse/partner] bought
| or sold any stock or stock mutual funds?

- | 1 Bought only
- | 2 Sold only
- | 3 Both bought and sold

```

| 4 Neither bought nor sold
|
| IF ( bought or sold any stock since ms83/ms74/oct 2008/since May 2009 = empty) THEN
|
| | ST004_NR_DK bought or sold any stock since ms83/ms74/oct 2008/since May 2009 after nonresponse
| | [You did not answer. Your answers are important to us. Please answer the question to the
| | best of your ability.] Since [time frame reference for ST00 questions], have [you and/or
| | your spouse/partner] bought or sold any stock or stock mutual funds?
| | 1 Bought only
| | 2 Sold only
| | 3 Both bought and sold
| | 4 Neither bought nor sold
| | 9 Don't know
| |
| ELSE
|
| ENDIF
|
| IF bought or sold any stock since ms83/ms74/oct 2008/since May 2009 = Bought only OR bought
| or sold any stock since ms83/ms74/oct 2008/since May 2009 after nonresponse = Bought only
| THEN
|
| | ST005 how much pay in total for stocks bought since october 1st/since MS74
| | How much did [you and/or your spouse/partner] pay in total for the stocks you bought since
| | [time frame reference for ST00 questions]?
| | Integer
| |
| IF how much pay in total for stocks bought since october 1st/since MS74 = empty THEN
|
| | | ST005_NR_DK how much pay in total for stocks bought since october 1st/since MS74 after nonresponse
| | | [You did not answer. Your answers are important to us. Please answer the question to the
| | | best of your ability.] How much did [you and/or your spouse/partner] pay in total for the
| | | stocks you bought since [time frame reference for ST00 questions]?
| | | 1 $0 - $5,000
| | | 2 $5,001 - $10,000
| | | 3 $10,001 - $25,000
| | | 4 $25,001 - $50,000
| | | 5 $50,001 - $100,000
| | | 6 $100,001 - $250,000
| | | 7 $250,001 - $500,000
| | | 8 $500,001 - $1,000,000
| | | 9 More than $1,000,000
| | | 10 Don't know
| | |
| | ELSE
| |
| | ENDIF
|
| ELSEIF bought or sold any stock since ms83/ms74/oct 2008/since May 2009 = Sold only OR
| bought or sold any stock since ms83/ms74/oct 2008/since May 2009 after nonresponse = Sold
| only THEN
|
| | ST006 how much receive in total for stocks bought since october 1st/since May 2009
| | How much money did [you and/or your spouse/partner] receive in total for the stocks you sold

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```
|| since [time frame reference for ST00 questions]?
|| Integer
||
|| IF how much receive in total for stocks bought since october 1st/since May 2009 = empty THEN
||
|| | ST006_NR_DK how much receive in total for stocks bought since october 1st/since May 2009 after
nonresponse
|| | [You did not answer. Your answers are important to us. Please answer the question to the
|| | best of your ability.] How much money did [you and/or your spouse/partner] receive in
|| | total for the stocks you sold since [time frame reference for ST00 questions]?
|| | 1 $0 - $5,000
|| | 2 $5,001 - $10,000
|| | 3 $10,001 - $25,000
|| | 4 $25,001 - $50,000
|| | 5 $50,001 - $100,000
|| | 6 $100,001 - $250,000
|| | 7 $250,001 - $500,000
|| | 8 $500,001 - $1,000,000
|| | 9 More than $1,000,000
|| | 10 Don't know
||
|| ELSE
||
|| ENDIF
||
|| ELSEIF bought or sold any stock since ms83/ms74/oct 2008/since May 2009 = Both bought and
|| sold OR bought or sold any stock since ms83/ms74/oct 2008/since May 2009 after nonresponse
|| = Both bought and sold THEN
||
|| | ST007 bought and sold since october 2008/since May 2009 took out or put in
|| | Thinking both of what [you and/or your spouse/partner] bought and what [you and/or your
|| | spouse/partner] sold since [time frame reference for ST00 questions], did you overall take
|| | money out of the stock market or did you overall put money in?
|| | 1 Took out
|| | 2 Put in
|| | 3 Neither (purchases and sales were worth about the same)
||
|| IF bought and sold since october 2008/since May 2009 took out or put in = empty THEN
||
|| | ST007_NR_DK bought and sold since october 2008/since May 2009 took out or put in
|| | [You did not answer. Your answers are important to us. Please answer the question to the
|| | best of your ability.] Thinking both of what [you and/or your spouse/partner] bought and
|| | what [you and/or your spouse/partner] sold since [time frame reference for ST00
|| | questions], did you overall take money out of the stock market or did you overall put
|| | money in?
|| | 1 Took out
|| | 2 Put in
|| | 3 Neither (purchases and sales were worth about the same)
|| | 8 Don't know
||
|| ELSE
||
|| ENDIF
||
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|| IF bought and sold since october 2008/since May 2009 took out or put in = Took out OR
|| bought and sold since october 2008/since May 2009 took out or put in = Took out THEN
||
|| ST007_a amount taken out of stock market since october 2008/may 2009
|| About how much in total did [you and/or your spouse/partner] take out of the stock market
|| since [time frame reference for ST00 questions]?
|| Integer
||
|| IF amount taken out of stock market since october 2008/may 2009 = empty THEN
||
|| ST007_a_NR_DK amount taken out of stock market after nonresponse since oct 2008/may 2009
|| [You did not answer. Your answers are important to us. Please answer the question to the
|| best of your ability.] About how much in total did [you and/or your spouse/partner] take
|| out of the stock market since [time frame reference for ST00 questions]?
|| 1 $0 - $5,000
|| 2 $5,001 - $10,000
|| 3 $10,001 - $25,000
|| 4 $25,001 - $50,000
|| 5 $50,001 - $100,000
|| 6 $100,001 - $250,000
|| 7 $250,001 - $500,000
|| 8 $500,001 - $1,000,000
|| 9 More than $1,000,000
|| 10 Don't know
||
|| ELSE
||
|| ENDIF
||
|| ELSEIF bought and sold since october 2008/since May 2009 took out or put in = Put in OR
|| bought and sold since october 2008/since May 2009 took out or put in = Put in THEN
||
|| ST007_b amount put in to stock market since oct 2008/may 2009
|| About how much in total did [you and/or your spouse/partner] put in to the stock market
|| since [time frame reference for ST00 questions]?
|| Integer
||
|| IF amount put in to stock market since oct 2008/may 2009 = empty THEN
||
|| ST007_b_NR_DK amount put in to the stock market since oct 2008/may 2009 after nonresponse
|| [You did not answer. Your answers are important to us. Please answer the question to the
|| best of your ability.] About how much in total did [you and/or your spouse/partner] put
|| in to the stock market since [time frame reference for ST00 questions]?
|| 1 $0 - $5,000
|| 2 $5,001 - $10,000
|| 3 $10,001 - $25,000
|| 4 $25,001 - $50,000
|| 5 $50,001 - $100,000
|| 6 $100,001 - $250,000
|| 7 $250,001 - $500,000
|| 8 $500,001 - $1,000,000
|| 9 More than $1,000,000
|| 10 Don't know
||

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|| ELSE
|||
||| ENDIF
|||
||| ENDIF
|||
||| ENDIF
|||
| ST010 chance investment blue chips worth more year from now
| We are interested in how well you think the economy will do in the future. On a scale from
| 0 percent to 100 percent where "0" means that you think there is absolutely no chance, and
| "100" means that you think the event is absolutely sure to happen, what are the chances that
| by next year at this time mutual fund shares invested in blue chip stocks like those in the
| Dow Jones Industrial Average will be worth more than they are today?
| Range: 0.0..100.0
|
| IF chance investment blue chips worth more year from now = empty THEN
|
| [Questions ST010_NR_SP to ST010_NR_DK are displayed as a table]
|
| ST010_NR_SP chance investment blue chips worth more year from now after nonresponse
| [You did not answer. Your answers are important to us. Please give us your best guess.] We
| are interested in how well you think the economy will do in the future. On a scale from 0
| percent to 100 percent where "0" means that you think there is absolutely no chance, and
| "100" means that you think the event is absolutely sure to happen, what are the chances that
| by next year at this time mutual fund shares invested in blue chip stocks like those in the
| Dow Jones Industrial Average will be worth more than they are today?
| Range: 0.0..100.0
|
| ST010_NR_DK chance investment blue chips worth more year from now after nonresponse DK
| [You did not answer. Your answers are important to us. Please give us your best guess.] We
| are interested in how well you think the economy will do in the future. On a scale from 0
| percent to 100 percent where "0" means that you think there is absolutely no chance, and
| "100" means that you think the event is absolutely sure to happen, what are the chances that
| by next year at this time mutual fund shares invested in blue chip stocks like those in the
| Dow Jones Industrial Average will be worth more than they are today?
| 8 Don't know
|
| IF ( chance investment blue chips worth more year from now after nonresponse != empty AND
| chance investment blue chips worth more year from now after nonresponse DK != empty) THEN
|
| | checkqanddk check display for giving answer to question and checking dont know box
| | You entered an answer to the question AND checked the box 'Don't know'. Please go back and
| | keep only the one entry that best describes your situation.
|
| | ENDIF
|
| ELSE
|
| ENDIF
|
| IF chance investment blue chips worth more year from now = 50 OR chance investment blue
| chips worth more year from now after nonresponse = 50 THEN
|

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| | ST011 chance investment blue chips worth more 50 percent
| | Do you think it is equally likely the shares will be worth more in a year as it is they will
| | be worth less or are you just unsure about the chances?
| | 1 Equally likely
| | 2 Unsure
| |
| | ENDIF
| |
| | IF chance investment blue chips worth more year from now > 0 OR chance investment blue
| | chips worth more year from now after nonresponse > 0 OR ( chance investment blue chips worth
| | more year from now = empty AND chance investment blue chips worth more year from now after
| | nonresponse = empty) THEN
| |
| | ST012 chance blue chip stocks gained more than 20 percent
| | By next year at this time, what are the chances that mutual fund shares invested in
| | blue-chip stocks like those in the Dow Jones Industrial Average will have increased in value
| | by more than 20 percent compared to what they are worth today?
| | Range: 0.0..100.0
| |
| | IF chance blue chip stocks gained more than 20 percent = empty THEN
| |
| | [Questions ST012_NR_SP to ST012_NR_DK are displayed as a table]
| |
| | ST012_NR_SP chance blue chip stocks gained more than 20 percent after nonresponse
| | [You did not answer. Your answers are important to us. Please give us your best guess.] By
| | next year at this time, what are the chances that mutual fund shares invested in blue-chip
| | stocks like those in the Dow Jones Industrial Average will have increased in value by more
| | than 20 percent compared to what they are worth today?
| | Range: 0.0..100.0
| |
| | ST012_NR_DK chance blue chip stocks gained more than 20 percent after nonresponse DK
| | [You did not answer. Your answers are important to us. Please give us your best guess.] By
| | next year at this time, what are the chances that mutual fund shares invested in blue-chip
| | stocks like those in the Dow Jones Industrial Average will have increased in value by more
| | than 20 percent compared to what they are worth today?
| | 8 Don't know
| |
| | IF ( chance blue chip stocks gained more than 20 percent after nonresponse != empty AND
| | chance blue chip stocks gained more than 20 percent after nonresponse DK != empty) THEN
| |
| | | | checkqanddk check display for giving answer to question and checking dont know box
| | | | You entered an answer to the question AND checked the box 'Don't know'. Please go back
| | | | and keep only the one entry that best describes your situation.
| | | |
| | | | ENDIF
| | | |
| | | | ELSE
| | | |
| | | | ENDIF
| | | |
| | | | ENDIF
| |
| | IF ( chance investment blue chips worth more year from now < 100 AND chance investment blue
| | chips worth more year from now != empty) OR ( chance investment blue chips worth more year

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| from now after nonresponse < 100 AND chance investment blue chips worth more year from now
| after nonresponse != empty) OR (chance investment blue chips worth more year from now =
| empty AND chance investment blue chips worth more year from now after nonresponse = empty) OR
| (chance investment blue chips worth more year from now after nonresponse DK = Don't know)
| THEN

||
|| **ST013** chance blue chip stocks fallen more than 20 percent
|| By next year at this time, what are the chances that mutual fund shares invested in
|| blue-chip stocks like those in the Dow Jones Industrial Average will have fallen in value by
|| more than 20 percent compared to what they are worth today?
|| Range: 0.0..100.0

|| IF chance blue chip stocks fallen more than 20 percent = empty THEN

|| [Questions ST013_NR_SP to ST013_NR_DK are displayed as a table]

|| **ST013_NR_SP** chance blue chip stocks fallen more than 20 percent after nonresponse
|| [You did not answer. Your answers are important to us. Please give us your best guess.] By
|| next year at this time, what are the chances that mutual fund shares invested in blue-chip
|| stocks like those in the Dow Jones Industrial Average will have fallen in value by more
|| than 20 percent compared to what they are worth today?
|| Range: 0.0..100.0

|| **ST013_NR_DK** chance blue chip stocks fallen more than 20 percent after nonresponse DK
|| [You did not answer. Your answers are important to us. Please give us your best guess.] By
|| next year at this time, what are the chances that mutual fund shares invested in blue-chip
|| stocks like those in the Dow Jones Industrial Average will have fallen in value by more
|| than 20 percent compared to what they are worth today?
|| 8 Don't know

|| IF (chance blue chip stocks fallen more than 20 percent after nonresponse != empty AND
|| chance blue chip stocks fallen more than 20 percent after nonresponse DK != empty) THEN

|| **checkqanddk** check display for giving answer to question and checking dont know box
|| You entered an answer to the question AND checked the box 'Don't know'. Please go back
|| and keep only the one entry that best describes your situation.

|| ENDIF

|| ELSE

|| ENDIF

|| ENDIF

| **ST014** chance blue chip stocks worth more in 10 years time
| Now please think about how the stock market will change over the next 10 years: What are
| the chances that mutual fund shares invested in blue chip stocks like those in the Dow Jones
| Industrial Average will be worth more in 10 years than they are today?
| Range: 0.0..100.0

| IF chance blue chip stocks worth more in 10 years time = empty THEN

|| [Questions ST014_NR_SP to ST014_NR_DK are displayed as a table]

||
|| **ST014_NR_SP** chance blue chip stocks worth more in 10 years time after nonresponse
|| [You did not answer. Your answers are important to us. Please give us your best guess.] Now
|| please think about how the stock market will change over the next 10 years: What are the
|| chances that mutual fund shares invested in blue chip stocks like those in the Dow Jones
|| Industrial Average will be worth more in 10 years than they are today?
|| Range: 0.0..100.0
||

|| **ST014_NR_DK** chance blue chip stocks worth more in 10 years time after nonresponse DK
|| [You did not answer. Your answers are important to us. Please give us your best guess.] Now
|| please think about how the stock market will change over the next 10 years: What are the
|| chances that mutual fund shares invested in blue chip stocks like those in the Dow Jones
|| Industrial Average will be worth more in 10 years than they are today?
|| 8 Don't know
||

|| IF (chance blue chip stocks worth more in 10 years time after nonresponse != empty AND
|| chance blue chip stocks worth more in 10 years time after nonresponse DK != empty) THEN
||

|| **checkqanddk** check display for giving answer to question and checking dont know box
|| You entered an answer to the question AND checked the box 'Don't know'. Please go back and
|| keep only the one entry that best describes your situation.
||

|| ENDIF
||

|| ELSE
||

|| ENDIF
||

|| IF (chance blue chip stocks worth more in 10 years time = 50 OR chance blue chip stocks
|| worth more in 10 years time after nonresponse = 50) THEN
||

|| **ST014_a** equally chance blue chip stocks worth more/less in 10 years time
|| Do you think it is equally likely the shares will be worth more in 10 years as it is they
|| will be worth less or are you just unsure about the chances?
|| 1 Equally likely
|| 2 Unsure
||

|| IF equally chance blue chip stocks worth more/less in 10 years time = empty THEN
||

|| **ST014_a_NR_DK** equally chance blue chip stocks worth more/less in 10 years time after nonresponse
|| [You did not answer. Your answers are important to us. Please answer the question to the
|| best of your ability.] Do you think it is equally likely the shares will be worth more in
|| 10 years as it is they will be worth less or are you just unsure about the chances?
|| 1 Equally likely
|| 2 Unsure
|| 8 Don't know
||

|| ELSE
||

|| ENDIF
||

|| ENDIF
||

|| **IntroShort** intro to spending questions
||

| The next questions are about how much your household spent on certain items in the last
| calendar month (i.e. during the month of [holder for previous month name]). As you will see,
| the list does not cover all types of spending, only those that tend to be most frequent. In
| later surveys we will ask about additional types of spending, and you will have a chance to
| report about those less frequently purchased items. [(Click here for a list of spending
| categories that we DO NOT ask about in this survey.)/ (Click here for a list of spending
| categories that we ask about LATER IN THIS survey.)] Please provide your best estimate of how
| much in total your household spent in the described categories. Please include spending by all
| members of your household, that is, by you and anyone living with you. Even if the amount
| your household spent last calendar month was unusual, please report that amount.

| [Questions SP001 to B24_NA are displayed as a table]

| **SP001** short intro to mortgage, rent, utilities, car spending questions
| Mortgage, rent, utilities, car Please provide your best estimate of how much in total your
| household spent in the following categories. Please include spending by all members of your
| household, that is, by you and anyone living with you. Even if the amount your household
| spent last calendar month was unusual, please report that amount.

| **B18** mortgage spending
| Mortgage
| Integer

| **B18_NA** mortgage spending not applicable
| Mortgage not applicable
| 1 Not applicable

| **B19** rent spending
| Rent
| Integer

| **B19_NA** rent spending not applicable
| Rent not applicable
| 1 Not applicable

| **B20** electricity spending
| Electricity
| Integer

| **B20_NA** electricity spending not applicable
| Electricity not applicable
| 1 Not applicable

| **B21** water spending
| Water
| Integer

| **B21_NA** water spending not applicable
| Water not applicable
| 1 Not applicable

| **B22** heating fuel for the home spending
| Heating fuel for the home
| Integer

| **B22_NA** heating fuel for the home spending not applicable
| Heating fuel for the home not applicable
| 1 Not applicable

| **B23** telephone, cable, internet spending
| Telephone, cable, internet
| Integer

| **B23_NA** telephone, cable, internet spending not applicable
| Telephone, cable, internet not applicable
| 1 Not applicable

| **B24** car payments (interest and principal) spending
| Car payments: interest & principal
| Integer

| **B24_NA** car payments (interest and principle) spending not applicable
| Car payments not applicable: interest & principal
| 1 Not applicable

| IF (fill for spending table error answer categories != empty AND fill for spending table
| empty answer categories != empty) THEN

| | **checkemptyanddouble** check for if spending table answers contain both empty and double answers
| | You did not give an answer for: [fill for spending table empty answer categories] You also
| | entered both a dollar amount AND checked the 'no spending' box for: [fill for spending table
| | error answer categories] Your answers are important to us. Please try to answer as best you
| | can. If you would like to change your answers to the question please press the "Back"
| | button.

| ELSEIF (fill for spending table empty answer categories != empty) THEN

| | **checknoanswer** check for not giving answer for spending category
| | You did not give an answer for: [fill for spending table empty answer categories] Your
| | answers are important to us. Please try to answer as best you can. If you would like to
| | answer the question please press the "Back" button.

| ELSEIF (fill for spending table error answer categories != empty) THEN

| | **checkamandcheck** check for giving answer to both amount question and checkbox
| | You entered both a dollar amount AND checked the 'no spending' box for: [fill for spending
| | table error answer categories] Please go back and keep only the answer(s) that best
| | describes your situation.

| ENDIF

| [Questions SP006 to B42_NA are displayed as a table]

| **SP006** short intro to food in/out, gasoline spending questions
| Food, beverages and gasoline Please provide your best estimate of how much in total your
| household spent in the following categories. Please include spending by all members of your
| household, that is, by you and anyone living with you. Even if the amount your household

| spent last calendar month was unusual, please report that amount.

| **B40** food and beverages: food and drinks, including alcoholic, that you buy in grocery or other stores spending
| Food and beverages: food and drinks, including alcoholic, that you buy in grocery or other
| stores
| Integer

| **B40_NA** food and beverages not applicable: food and drinks, including alcoholic, that you buy in grocery or
| other stores spending
| Food and beverages not applicable: food and drinks, including alcoholic, that you buy in
| grocery or other stores
| 1 Not applicable

| **B41** dining and/or drinking out: items in restaurants, cafes, bars and diners, including take-out food spending
| Dining and/or drinking out: items in restaurants, cafes, bars and diners, including take-out
| food
| Integer

| **B41_NA** dining and/or drinking out: items in restaurants, cafes, bars and diners, including take-out food
| spending
| Dining and/or drinking out not applicable: items in restaurants, cafes, bars and diners,
| including take-out food
| 1 Not applicable

| **B42** gasoline spending
| Gasoline
| Integer

| **B42_NA** gasoline spending not applicable
| Gasoline not applicable
| 1 Not applicable

| IF (fill for spending table error answer categories != empty AND fill for spending table
| empty answer categories != empty) THEN

| | **checkemptyanddouble** check for if spending table answers contain both empty and double answers
| | You did not give an answer for: [fill for spending table empty answer categories] You also
| | entered both a dollar amount AND checked the 'no spending' box for: [fill for spending table
| | error answer categories] Your answers are important to us. Please try to answer as best you
| | can. If you would like to change your answers to the question please press the "Back"
| | button.

| ELSEIF (fill for spending table empty answer categories != empty) THEN

| | **checknoanswer** check for not giving answer for spending category
| | You did not give an answer for: [fill for spending table empty answer categories] Your
| | answers are important to us. Please try to answer as best you can. If you would like to
| | answer the question please press the "Back" button.

| ELSEIF (fill for spending table error answer categories != empty) THEN

| | **checkamandcheck** check for giving answer to both amount question and checkbox
| | You entered both a dollar amount AND checked the 'no spending' box for: [fill for spending

| table error answer categories] Please go back and keep only the answer(s) that best
| describes your situation.

|
| ENDIF

| [Questions SP002 to B28_NA are displayed as a table]

| **SP002** short intro to housekeeping, garden spending questions
| Housekeeping, garden Please provide your best estimate of how much in total your household
| spent in the following categories. Please include spending by all members of your household,
| that is, by you and anyone living with you. Even if the amount your household spent last
| calendar month was unusual, please report that amount.

| **B25** housekeeping supplies: cleaning and laundry products spending
| Housekeeping supplies: cleaning and laundry products
| Integer

| **B25_NA** housekeeping supplies not applicable: cleaning and laundry products spending
| Housekeeping supplies not applicable: cleaning and laundry products
| 1 Not applicable

| **B26** housekeeping, dry cleaning and laundry service spending
| Housekeeping, dry cleaning and laundry services: hiring costs for housekeeping or home
| cleaning, and amount spent at dry cleaners and laundries
| Integer

| **B26_NA** housekeeping, dry cleaning and laundry service spending not applicable
| Housekeeping, dry cleaning and laundry services not applicable: hiring costs for housekeeping
| or home cleaning, and amount spent at dry cleaners and laundries
| 1 Not applicable

| **B27** gardening and yard supplies: yard, lawn and garden products spending
| Gardening and yard supplies: yard, lawn and garden products
| Integer

| **B27_NA** gardening and yard supplies not applicable: yard, lawn and garden products spending
| Gardening and yard supplies not applicable: yard, lawn and garden products
| 1 Not applicable

| **B28** gardening and yard services: hiring costs including materials they provided spending
| Gardening and yard services: hiring costs including materials they provided
| Integer

| **B28_NA** gardening and yard services not applicable: hiring costs including materials they provided spending
| Gardening and yard services not applicable: hiring costs including materials they provided
| 1 Not applicable

| IF (fill for spending table error answer categories != empty AND fill for spending table
| empty answer categories != empty) THEN

| | **checkemptyanddouble** check for if spending table answers contain both empty and double answers
| | You did not give an answer for: [fill for spending table empty answer categories] You also
| | entered both a dollar amount AND checked the 'no spending' box for: [fill for spending table

| error answer categories] Your answers are important to us. Please try to answer as best you
| can. If you would like to change your answers to the question please press the "Back"
| button.

| ELSEIF (fill for spending table empty answer categories != empty) THEN

| **checknoanswer** check for not giving answer for spending category
| You did not give an answer for: [fill for spending table empty answer categories] Your
| answers are important to us. Please try to answer as best you can. If you would like to
| answer the question please press the "Back" button.

| ELSEIF (fill for spending table error answer categories != empty) THEN

| **checkamandcheck** check for giving answer to both amount question and checkbox
| You entered both a dollar amount AND checked the 'no spending' box for: [fill for spending
| table error answer categories] Please go back and keep only the answer(s) that best
| describes your situation.

| ENDIF

| [Questions SP003 to B33_NA are displayed as a table]

| **SP003** short intro to clothing, health spending questions
| Clothing, health Please provide your best estimate of how much in total your household
| spent in the following categories. Please include spending by all members of your household,
| that is, by you and anyone living with you. Even if the amount your household spent last
| calendar month was unusual, please report that amount.

| **B29** clothing and apparel: including footwear, outerwear, and products such as watches or jewelry spending
| Clothing and apparel: including footwear, outerwear, and products such as watches or jewelry
| Integer

| **B29_NA** clothing and apparel not applicable: including footwear, outerware, and products such as watches or
| jewelry spending
| Clothing and apparel not applicable: including footwear, outerware, and products such as
| watches or jewelry
| 1 Not applicable

| **B30** personal care products and services: including hair care, shaving and skin products, amount spent at hair
| dresser, manicure, etc. spending
| Personal care products and services: including hair care, shaving and skin products, amount
| spent at hair dresser, manicure, etc.
| Integer

| **B30_NA** personal care products and services not applicable: including hair care, shaving and skin products,
| amount spent at hair dresser, manicure, etc. spend
| Personal care products and services not applicable: including hair care, shaving and skin
| products, amount spent at hair dresser, manicure, etc.
| 1 Not applicable

| **B31** prescription and nonprescription medications: out-of-pocket cost, not including whats covered by insurance
| spending
| Prescription and nonprescription medications: out-of-pocket cost, not including what's covered
| by insurance

| Integer

| **B31_NA** prescription and nonprescription medications not applicable: out-of-pocket cost, not including whats covered by insur

| Prescription and nonprescription medications not applicable: out-of-pocket cost, not including what's covered by insurance

| 1 Not applicable

| **B32** health care services: out-of-pocket cost of hospital care, doctor services, lab tests, eye, dental, and nursing home care spending

| Health care services: out-of-pocket cost of hospital care, doctor services, lab tests, eye, dental, and nursing home care

| Integer

| **B32_NA** Health care services not applicable: out-of-pocket cost of hospital care, doctor services, lab tests, eye, dental, and nursing home care spending

| Health care services not applicable: out-of-pocket cost of hospital care, doctor services, lab tests, eye, dental, and nursing home care

| 1 Not applicable

| **B33** medical supplies: out-of-pocket cost, not including what's covered by insurance spending

| Medical supplies: out-of-pocket cost, not including what's covered by insurance

| Integer

| **B33_NA** Medical supplies not applicable: out-of-pocket cost, not including what's covered by insurance spending

| Medical supplies not applicable: out-of-pocket cost, not including what's covered by insurance

| 1 Not applicable

| IF (fill for spending table error answer categories != empty AND fill for spending table empty answer categories != empty) THEN

|| **checkemptyanddouble** check for if spending table answers contain both empty and double answers
|| You did not give an answer for: [fill for spending table empty answer categories] You also
|| entered both a dollar amount AND checked the 'no spending' box for: [fill for spending table
|| error answer categories] Your answers are important to us. Please try to answer as best you
|| can. If you would like to change your answers to the question please press the "Back"
|| button.

| ELSEIF (fill for spending table empty answer categories != empty) THEN

|| **checknoanswer** check for not giving answer for spending category
|| You did not give an answer for: [fill for spending table empty answer categories] Your
|| answers are important to us. Please try to answer as best you can. If you would like to
|| answer the question please press the "Back" button.

| ELSEIF (fill for spending table error answer categories != empty) THEN

|| **checkamandcheck** check for giving answer to both amount question and checkbox
|| You entered both a dollar amount AND checked the 'no spending' box for: [fill for spending
|| table error answer categories] Please go back and keep only the answer(s) that best
|| describes your situation.

| ENDIF

| [Questions SP004 to B36_NA are displayed as a table]

| **SP004** short intro to leisure spending questions

| Leisure Please provide your best estimate of how much in total your household spent in the
| following categories. Please include spending by all members of your household, that is, by
| you and anyone living with you. Even if the amount your household spent last calendar month
| was unusual, please report that amount.

| **B34** entertainment: tickets to movies, sporting events, performing arts, etc. spending

| Entertainment: tickets to movies, sporting events, performing arts, etc

| Integer

| **B34_NA** entertainment: tickets not applicable to movies, sporting events, performing arts, etc. spending

| Entertainment: tickets not applicable to movies, sporting events, performing arts, etc.

| 1 Not applicable

| **B35** sports: including gym, exercise equipment such as bicycles, skis, boats, etc. spending

| Sports: including gym, exercise equipment such as bicycles, skis, boats, etc.

| Integer

| **B35_NA** Sports not applicable: including gym, exercise equipment such as bicycles, skis, boats, etc. spending

| Sports not applicable: including gym, exercise equipment such as bicycles, skis, boats, etc.

| 1 Not applicable

| **B36** hobbies and leisure equipment: such as photography, stamps, reading materials, camping, etc. spending

| Hobbies and leisure equipment: such as photography, stamps, reading materials, camping, etc.

| Integer

| **B36_NA** hobbies and leisure equipment not applicable: such as photography, stamps, reading materials,
| camping, etc. spending

| Hobbies and leisure equipment not applicable: such as photography, stamps, reading materials,
| camping, etc.

| 1 Not applicable

| IF (fill for spending table error answer categories != empty AND fill for spending table

| empty answer categories != empty) THEN

| | **checkemptyanddouble** check for if spending table answers contain both empty and double answers

| | You did not give an answer for: [fill for spending table empty answer categories] You also
| | entered both a dollar amount AND checked the 'no spending' box for: [fill for spending table
| | error answer categories] Your answers are important to us. Please try to answer as best you
| | can. If you would like to change your answers to the question please press the "Back"
| | button.

| ELSEIF (fill for spending table empty answer categories != empty) THEN

| | **checknoanswer** check for not giving answer for spending category

| | You did not give an answer for: [fill for spending table empty answer categories] Your
| | answers are important to us. Please try to answer as best you can. If you would like to
| | answer the question please press the "Back" button.

| ELSEIF (fill for spending table error answer categories != empty) THEN

| |
| | **checkamandcheck** check for giving answer to both amount question and checkbox
| | You entered both a dollar amount AND checked the 'no spending' box for: [fill for spending
| | table error answer categories] Please go back and keep only the answer(s) that best
| | describes your situation.

| ENDIF

| [Questions SP005 to B39_NA are displayed as a table]

| **SP005** short intro to pers.serv, education, other child-rel spending questions
| Personal services, education, and other child-related spending Please provide your best
| estimate of how much in total your household spent in the following categories. Please include
| spending by all members of your household, that is, by you and anyone living with you. Even
| if the amount your household spent last calendar month was unusual, please report that amount.

| **B37** personal services: including cost of care for elderly and/or children, after-school activities spending
| Personal services: including cost of care for elderly and/or children, after-school activities

| Integer

| **B37_NA** personal services not applicable: including cost of day care, baby-sitters, after-school spending
| Personal Services not applicable: including cost of care for elderly and/or children,
| after-school activities

| 1 Not applicable

| **B38** education: including tuition, room and board, books and supplies spending
| Education: including tuition, room and board, books and supplies

| Integer

| **B38_NA** education not applicable: including tuition , room and board, books and supplies spending
| Education not applicable: including tuition, room and board, books and supplies

| 1 Not applicable

| **B39** other child-related spending, not yet reported: including gear and equipment, spending
| Other child-related spending, not yet reported: including toys, gear and equipment

| Integer

| **B39_NA** other child-related spending not applicable, not yet reported: including gear and equipment, spending
| Other child-related spending not applicable, not yet reported: including toys, gear and
| equipment

| 1 Not applicable

| IF (fill for spending table error answer categories != empty AND fill for spending table
| empty answer categories != empty) THEN

| |
| | **checkemptyanddouble** check for if spending table answers contain both empty and double answers
| | You did not give an answer for: [fill for spending table empty answer categories] You also
| | entered both a dollar amount AND checked the 'no spending' box for: [fill for spending table
| | error answer categories] Your answers are important to us. Please try to answer as best you
| | can. If you would like to change your answers to the question please press the "Back"

| button.

| ELSEIF (fill for spending table empty answer categories != empty) THEN

| **checknoanswer** check for not giving answer for spending category
| You did not give an answer for: [fill for spending table empty answer categories] Your
| answers are important to us. Please try to answer as best you can. If you would like to
| answer the question please press the "Back" button.

| ELSEIF (fill for spending table error answer categories != empty) THEN

| **checkamandcheck** check for giving answer to both amount question and checkbox
| You entered both a dollar amount AND checked the 'no spending' box for: [fill for spending
| table error answer categories] Please go back and keep only the answer(s) that best
| describes your situation.

| ENDIF

| [The following questions are displayed as a table]

| **FL_TotalText** total of spending

| \$ []

| String

| **summary_intro** intro to summary table

| According to your entries your household's spending in [holder for previous month name] on the
| described categories was: \$[]. Below is a summary of your entries. If you would like to make
| any changes to your entries, you can change the amounts in the table below and then click the
| 'Update total' button in the lower right corner of the screen to recalculate your total. Once
| you are satisfied with your entries, please just click 'Next'. [As a reminder, there are some
| categories of spending that we DID NOT ask you about in this survey, but we will ask these in
| a later survey. (Click here for a list of spending categories that we will ask in a later
| survey.)/As a reminder, there are some categories of spending that we HAVE NOT YET asked you
| about, but that we will ask you in the next set of questions in THIS SURVEY. (Click here for a
| list of spending categories that we will ask about in the next set of questions.)]

| **B18_confirm** summary mortgage spending

| Mortgage

| Integer

| **B19_confirm** summary rent spending

| Rent

| Integer

| **B20_confirm** summary electricity spending

| Electricity

| Integer

| **B21_confirm** summary water spending

| Water

| Integer

| **B22_confirm** summary heating fuel for the home spending

| Heating fuel for the home

| Integer

| **B23_confirm** summary telephone, cable, internet spending

| Telephone, cable, internet

| Integer

| **B24_confirm** summary car payments (interest and principal) spending

| Car payments

| Integer

| **B40_confirm** summary food and beverages: food and drinks, including alcoholic, that you buy in grocery or other stores spending

| Food and beverages

| Integer

| **B41_confirm** summary dining and/or drinking out: items in restaurants, cafes, bars and diners, including take-out food spending

| Dining and/or drinking out

| Integer

| **B42_confirm** summary gasoline spending

| Gasoline

| Integer

| **B25_confirm** summary housekeeping supplies: cleaning and laundry products spending

| Housekeeping supplies

| Integer

| **B26_confirm** summary housekeeping, dry cleaning and laundry service spending

| Housekeeping, dry cleaning and laundry services

| Integer

| **B27_confirm** summary gardening and yard supplies: yard, lawn and garden products spending

| Gardening and yard supplies

| Integer

| **B28_confirm** summary gardening and yard services: hiring costs including materials they provided spending

| Gardening and yard services

| Integer

| **B29_confirm** summary clothing and apparel: including footwear, outerware, and products such as watches or jewelry spending

| Clothing and apparel

| Integer

| **B30_confirm** summary personal care products and services: including hair care, shaving and skin products, amount spent at hair dresser, manicure, etc. spending

| Personal care products and services

| Integer

| **B31_confirm** summary prescription and nonprescription medications: out-of-pocket cost

| Prescription and nonprescription medications

| Integer

| **B32_confirm** summary health care services: out-of-pocket cost of hospital care, doctor services, lab tests, eye, dental, and nursing home care spending

| Health care services

| Integer

| **B33_confirm** summary medical supplies: out-of-pocket cost, not including what's covered by insurance spending

| Medical supplies

| Integer

| **B34_confirm** summary entertainment: tickets to movies, sporting events, performing arts, etc. spending

| Entertainment

| Integer

| **B35_confirm** summary sports: including gym, exercise equipment such as bicycles, skis, boats, etc. spending

| Sports

| Integer

| **B36_confirm** summary hobbies and leisure equipment: such as photography, stamps, reading materials, camping, etc. spending

| Hobbies and leisure equipment

| Integer

| **B37_confirm** summary personal services: including cost of day care, baby-sitters, after-school spending

| Personal services

| Integer

| **B38_confirm** summary education: including tuition , room and board, books and supplies spending

| Education

| Integer

| **B39_confirm** summary other child-related spending, not yet reported: including gear and equipment, spending

| Other child-related spending, not yet reported

| Integer

| [End of table display]

| **CS_001** HOW PLEASANT INTERVIEW

| Could you tell us how interesting or uninteresting you found the questions in this interview?

| 1 Very interesting

| 2 Interesting

| 3 Neither interesting nor uninteresting

| 4 Uninteresting

| 5 Very uninteresting

| EXIT

| ENDIF