Well Being 189

IF CURRENT JOB STATUS = empty THEN
|
| **currentjobstatus** CURRENT JOB STATUS
| What is your current employment situation?
| 1 Working now
| 2 Unemployed and looking for work
| 3 Temporarily laid off, on sick or other leave
| 4 Disabled
| 5 Retired
| 6 Homemaker
| 7 Other
|
ENDIF

IF CALCULATED AGE = empty THEN
|
| [Questions IN002 to birthyear are displayed as a table]
|
| **IN002** BIRTH DATE HEADER
| What is your birth date?
|
| **birthmonth** BIRTH MONTH
| Month
| 1 January
| 2 February
| 3 March
| 4 April
| 5 May
| 6 June
| 7 July
| 8 August
| 9 September
| 10 October
| 11 November
| 12 December
|
| **birthday** BIRTH DAY
| Day
| 1 01
| 2 02
| 3 03
| 4 04
| 5 05
| 6 06
| 7 07
| 8 08
| 9 09
| 10 10
| 11 11
| 12 12
| 13 13
| 14 14

| 15 15
| 16 16
| 17 17
| 18 18
| 19 19
| 20 20
| 21 21
| 22 22
| 23 23
| 24 24
| 25 25
| 26 26
| 27 27
| 28 28
| 29 29
| 30 30
| 31 31
|
| **birthyear** BIRTH YEAR
| Year
| 11 1911
| 12 1912
| 13 1913
| 14 1914
| 15 1915
| 16 1916
| 17 1917
| 18 1918
| 19 1919
| 20 1920
| 21 1921
| 22 1922
| 23 1923
| 24 1924
| 25 1925
| 26 1926
| 27 1927
| 28 1928
| 29 1929
| 30 1930
| 31 1931
| 32 1932
| 33 1933
| 34 1934
| 35 1935
| 36 1936
| 37 1937
| 38 1938
| 39 1939
| 40 1940
| 41 1941
| 42 1942
| 43 1943
| 44 1944

| 45 1945
| 46 1946
| 47 1947
| 48 1948
| 49 1949
| 50 1950
| 51 1951
| 52 1952
| 53 1953
| 54 1954
| 55 1955
| 56 1956
| 57 1957
| 58 1958
| 59 1959
| 60 1960
| 61 1961
| 62 1962
| 63 1963
| 64 1964
| 65 1965
| 66 1966
| 67 1967
| 68 1968
| 69 1969
| 70 1970
| 71 1971
| 72 1972
| 73 1973
| 74 1974
| 75 1975
| 76 1976
| 77 1977
| 78 1978
| 79 1979
| 80 1980
| 81 1981
| 82 1982
| 83 1983
| 84 1984
| 85 1985
| 86 1986
| 87 1987
| 88 1988
| 89 1989
| 90 1990
| 91 1991
| 92 1992
| 93 1993
| 94 1994
| 95 1995
| 96 1996
| 97 1997
| 98 1998

```
| 99 1999
|
ENDIF
```

[The following questions are displayed as a table]

I1a country born
In what country were you born?
51 United States of America
1 Argentina
2 Brazil
3 Cambodia
4 Canada
5 China
6 Colombia
7 Cuba
8 Dominican Republic
9 Ecuador
10 Egypt
11 El Salvador
12 England
13 France
14 Germany
15 Greece
16 Guatemala
17 Guyana/British Guiana
18 Haiti
19 Honduras
20 Hong Kong
21 India
22 Iran
23 Ireland
24 Israel/Palestine
25 Italy
26 Jamaica
27 Japan
28 Korea
29 Laos
30 Lebanon
31 Mexico
32 Netherlands
33 Nicaragua
34 Nigeria
35 Russia
36 Pakistan
37 Panama
38 Peru
39 Philippines
40 Poland
41 Portugal
42 Puerto Rico
43 Romania
44 South Korea
45 Spain

46 Taiwan
47 Thailand
48 Trinidad and Tobago
49 Ukraine
50 United Kingdom
52 Venezuela
53 Vietnam
54 Other (please specify):

I1a_other other

String

[End of table display]
IF country born = United States of America THEN
|
| **I1** state born
| In which state were you born?
| 1 ALASKA (AK)
| 2 ALABAMA (AL)
| 3 ARIZONA (AZ)
| 4 ARKANSAS (AR)
| 5 CALIFORNIA (CA)
| 6 COLORADO (CO)
| 7 CONNECTICUT (CT)
| 8 DELAWARE (DE)
| 9 FLORIDA (FL)
| 10 GEORGIA (GA)
| 11 HAWAII (HI)
| 12 IDAHO (ID)
| 13 ILLINOIS (IL)
| 14 INDIANA (IN)
| 15 IOWA (IA)
| 16 KANSAS (KS)
| 17 KENTUCKY (KY)
| 18 LOUISIANA (LA)
| 19 MAINE (ME)
| 20 MARYLAND (MD)
| 21 MASSACHUSETTS (MA)
| 22 MICHIGAN (MI)
| 23 MINNESOTA (MN)
| 24 MISSISSIPPI (MS)
| 25 MISSOURI (MO)
| 26 MONTANA (MT)
| 27 NEBRASKA (NE)
| 28 NEVADA (NV)
| 29 NEW HAMPSHIRE (NH)
| 30 NEW JERSEY (NJ)
| 31 NEW MEXICO (NM)
| 32 NEW YORK (NY)
| 33 NORTH CAROLINA (NC)
| 34 NORTH DAKOTA (ND)
| 35 OHIO (OH)
| 36 OKLAHOMA (OK)

| 37 OREGON (OR)
| 38 PENNSYLVANIA (PA)
| 39 RHODE ISLAND (RI)
| 40 SOUTH CAROLINA (SC)
| 41 SOUTH DAKOTA (SD)
| 42 TENNESSEE (TN)
| 43 TEXAS (TX)
| 44 UTAH (UT)
| 45 VERMONT (VT)
| 46 VIRGINIA (VA)
| 47 WASHINGTON (WA)
| 48 WEST VIRGINIA (WV)
| 49 WISCONSIN (WI)
| 50 WYOMING (WY)
| 51 WASHINGTON D.C.
| 52 PUERTO RICO
| 53 I was not born in the US
|
| IF state born = I was not born in the US THEN
| |
| | **CheckUS** check US birth mismatch
| | You just specified that you were not born in the US, but in the question prior to that you said
| | that you were. Your answers are important to us. Please go back and correct your answer(s).
| |
| ENDIF
|
ELSE
|
| **I2** year come to live in US
| In which year did you come to live in the United States?
| 1900 1900
| 1901 1901
| 1902 1902
| 1903 1903
| 1904 1904
| 1905 1905
| 1906 1906
| 1907 1907
| 1908 1908
| 1909 1909
| 1910 1910
| 1911 1911
| 1912 1912
| 1913 1913
| 1914 1914
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| 1937 1937
| 1938 1938
| 1939 1939
| 1940 1940
| 1941 1941
| 1942 1942
| 1943 1943
| 1944 1944
| 1945 1945
| 1946 1946
| 1947 1947
| 1948 1948
| 1949 1949
| 1950 1950
| 1951 1951
| 1952 1952
| 1953 1953
| 1954 1954
| 1955 1955
| 1956 1956
| 1957 1957
| 1958 1958
| 1959 1959
| 1960 1960
| 1961 1961
| 1962 1962
| 1963 1963
| 1964 1964
| 1965 1965
| 1966 1966
| 1967 1967
| 1968 1968
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| 1971 1971
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| 1974 1974
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| 1992 1992
| 1993 1993
| 1994 1994
| 1995 1995
| 1996 1996
| 1997 1997
| 1998 1998
| 1999 1999
| 2000 2000
| 2001 2001
| 2002 2002
| 2003 2003
| 2004 2004
| 2005 2005
| 2006 2006
| 2007 2007
| 2008 2008
| 2009 2009
| 2010 2010
| 2011 2011
|
| **I3** currently US citizen
| Are you currently a citizen of the United States?
| 1 Yes
| 2 No
|
| IF currently US citizen != Yes THEN
| |
| | **I4** currently have permanent residence card or green card
| | Do you currently have a permanent residence card or a green card?
| | 1 Yes
| | 2 No
| |
| | IF currently have permanent residence card or green card != Yes THEN
| | |
| | | **I5** granted asylum, refugee status, or TPS
| | | Have you been granted asylum, refugee status, or temporary protected immigrant status (TPS)?
| | | 1 Yes
| | | 2 No
| | |

||| IF granted asylum, refugee status, or TPS != Yes THEN
||||
|||| **I6** visa or other document
|||| Do you have a tourist visa, a student visa, a work visa or permit, or another document which
|||| permits you to stay in the US for a limited time?
|||| 1 Yes
|||| 2 No
||||
|||| **I7** visa valid or expired
|||| Is this visa or document still valid or has it expired?
|||| 1 Still valid
|||| 2 Has expired
||||
||| ENDIF
|||
|| ENDIF
||
| ENDIF
|
| **I8** how well understand english
| How well would you say you understand English when someone is speaking to you? Would you say:
| 1 Very well
| 2 Well
| 3 Not well
| 4 Not at all
|
| **I9** how well speak english
| How well would you say you speak English? Would you say:
| 1 Very well
| 2 Well
| 3 Not well
| 4 Not at all
|
| **I10** how well read english
| How well would you say you read English? Would you say:
| 1 Very well
| 2 Well
| 3 Not well
| 4 Not at all
|
| **I11** how well write english
| How well would you say you write English? Would you say:
| 1 Very well
| 2 Well
| 3 Not well
| 4 Not at all
|
| **I12** attended classes to learn or improve English last twelve months
| Have you attended classes to learn or improve your English during the last twelve months?
| 1 Yes
| 2 No
|
ENDIF

[The following questions are displayed as a table]

I13 country mother born
What country was your mother born in?
51 United States of America
1 Argentina
2 Brazil
3 Cambodia
4 Canada
5 China
6 Colombia
7 Cuba
8 Dominican Republic
9 Ecuador
10 Egypt
11 El Salvador
12 England
13 France
14 Germany
15 Greece
16 Guatemala
17 Guyana/British Guiana
18 Haiti
19 Honduras
20 Hong Kong
21 India
22 Iran
23 Ireland
24 Israel/Palestine
25 Italy
26 Jamaica
27 Japan
28 Korea
29 Laos
30 Lebanon
31 Mexico
32 Netherlands
33 Nicaragua
34 Nigeria
35 Russia
36 Pakistan
37 Panama
38 Peru
39 Philippines
40 Poland
41 Portugal
42 Puerto Rico
43 Romania
44 South Korea
45 Spain
46 Taiwan
47 Thailand
48 Trinidad and Tobago
49 Ukraine

50 United Kingdom
52 Venezuela
53 Vietnam
54 Other (please specify):

I13_other other

String

[End of table display]
[The following questions are displayed as a table]

I14 country father born
What country was your father born in?
51 United States of America
1 Argentina
2 Brazil
3 Cambodia
4 Canada
5 China
6 Colombia
7 Cuba
8 Dominican Republic
9 Ecuador
10 Egypt
11 El Salvador
12 England
13 France
14 Germany
15 Greece
16 Guatemala
17 Guyana/British Guiana
18 Haiti
19 Honduras
20 Hong Kong
21 India
22 Iran
23 Ireland
24 Israel/Palestine
25 Italy
26 Jamaica
27 Japan
28 Korea
29 Laos
30 Lebanon
31 Mexico
32 Netherlands
33 Nicaragua
34 Nigeria
35 Russia
36 Pakistan
37 Panama
38 Peru
39 Philippines

40 Poland
41 Portugal
42 Puerto Rico
43 Romania
44 South Korea
45 Spain
46 Taiwan
47 Thailand
48 Trinidad and Tobago
49 Ukraine
50 United Kingdom
52 Venezuela
53 Vietnam
54 Other (please specify):

I14_other other

String

[End of table display]
I15 any grandparents born outside the US
Were any of your grandparents born outside the United States? Choose all that apply.
1 My maternal grandmother (my mother's mother)
2 My maternal grandfather (my mother's father)
3 My paternal grandmother (my father's mother)
4 MY paternal grandfather (my father's father)

IF My maternal grandmother (my mother's mother) in any grandparents born outside the US THEN
|
| [The following questions are displayed as a table]
|
| **I16MGM** country maternal grandmother born
| What country was your maternal grandmother born in?
| 1 Argentina
| 2 Brazil
| 3 Cambodia
| 4 Canada
| 5 China
| 6 Colombia
| 7 Cuba
| 8 Dominican Republic
| 9 Ecuador
| 10 Egypt
| 11 El Salvador
| 12 England
| 13 France
| 14 Germany
| 15 Greece
| 16 Guatemala
| 17 Guyana/British Guiana
| 18 Haiti
| 19 Honduras
| 20 Hong Kong
| 21 India

| 22 Iran
| 23 Ireland
| 24 Israel/Palestine
| 25 Italy
| 26 Jamaica
| 27 Japan
| 28 Korea
| 29 Laos
| 30 Lebanon
| 31 Mexico
| 32 Netherlands
| 33 Nicaragua
| 34 Nigeria
| 35 Russia
| 36 Pakistan
| 37 Panama
| 38 Peru
| 39 Philippines
| 40 Poland
| 41 Portugal
| 42 Puerto Rico
| 43 Romania
| 44 South Korea
| 45 Spain
| 46 Taiwan
| 47 Thailand
| 48 Trinidad and Tobago
| 49 Ukraine
| 50 United Kingdom
| 52 Venezuela
| 53 Vietnam
| 54 Other (please specify):
|
| **I16MGM_other** other
|
| String
|
| [End of table display]
ENDIF

IF My maternal grandfather (my mother's father) in any grandparents born outside the US THEN
|
| [The following questions are displayed as a table]
|
| **I16MGF** country maternal grandfather born
| What country was your maternal grandfather born in?
| 1 Argentina
| 2 Brazil
| 3 Cambodia
| 4 Canada
| 5 China
| 6 Colombia
| 7 Cuba
| 8 Dominican Republic

| 9 Ecuador
| 10 Egypt
| 11 El Salvador
| 12 England
| 13 France
| 14 Germany
| 15 Greece
| 16 Guatemala
| 17 Guyana/British Guiana
| 18 Haiti
| 19 Honduras
| 20 Hong Kong
| 21 India
| 22 Iran
| 23 Ireland
| 24 Israel/Palestine
| 25 Italy
| 26 Jamaica
| 27 Japan
| 28 Korea
| 29 Laos
| 30 Lebanon
| 31 Mexico
| 32 Netherlands
| 33 Nicaragua
| 34 Nigeria
| 35 Russia
| 36 Pakistan
| 37 Panama
| 38 Peru
| 39 Philippines
| 40 Poland
| 41 Portugal
| 42 Puerto Rico
| 43 Romania
| 44 South Korea
| 45 Spain
| 46 Taiwan
| 47 Thailand
| 48 Trinidad and Tobago
| 49 Ukraine
| 50 United Kingdom
| 52 Venezuela
| 53 Vietnam
| 54 Other (please specify):
|
| **I16MGF_other** other
|
| String
|
| [End of table display]
ENDIF

IF My paternal grandmother (my father's mother) in any grandparents born outside the US THEN

|
| [The following questions are displayed as a table]
|
| **I16PGM** country paternal grandmother born
| What country was your paternal grandmother born in?
| 1 Argentina
| 2 Brazil
| 3 Cambodia
| 4 Canada
| 5 China
| 6 Colombia
| 7 Cuba
| 8 Dominican Republic
| 9 Ecuador
| 10 Egypt
| 11 El Salvador
| 12 England
| 13 France
| 14 Germany
| 15 Greece
| 16 Guatemala
| 17 Guyana/British Guiana
| 18 Haiti
| 19 Honduras
| 20 Hong Kong
| 21 India
| 22 Iran
| 23 Ireland
| 24 Israel/Palestine
| 25 Italy
| 26 Jamaica
| 27 Japan
| 28 Korea
| 29 Laos
| 30 Lebanon
| 31 Mexico
| 32 Netherlands
| 33 Nicaragua
| 34 Nigeria
| 35 Russia
| 36 Pakistan
| 37 Panama
| 38 Peru
| 39 Philippines
| 40 Poland
| 41 Portugal
| 42 Puerto Rico
| 43 Romania
| 44 South Korea
| 45 Spain
| 46 Taiwan
| 47 Thailand
| 48 Trinidad and Tobago
| 49 Ukraine

| 50 United Kingdom
| 52 Venezuela
| 53 Vietnam
| 54 Other (please specify):
|
| **I16PGM_other** other
|
| String
|
| [End of table display]
ENDIF

IF MY paternal grandfather (my father's father) in any grandparents born outside the US THEN
|
| [The following questions are displayed as a table]
|
| **I16PGF** country paternal grandfather born
| What country was your paternal grandfather born in?
| 1 Argentina
| 2 Brazil
| 3 Cambodia
| 4 Canada
| 5 China
| 6 Colombia
| 7 Cuba
| 8 Dominican Republic
| 9 Ecuador
| 10 Egypt
| 11 El Salvador
| 12 England
| 13 France
| 14 Germany
| 15 Greece
| 16 Guatemala
| 17 Guyana/British Guiana
| 18 Haiti
| 19 Honduras
| 20 Hong Kong
| 21 India
| 22 Iran
| 23 Ireland
| 24 Israel/Palestine
| 25 Italy
| 26 Jamaica
| 27 Japan
| 28 Korea
| 29 Laos
| 30 Lebanon
| 31 Mexico
| 32 Netherlands
| 33 Nicaragua
| 34 Nigeria
| 35 Russia
| 36 Pakistan

| 37 Panama
| 38 Peru
| 39 Philippines
| 40 Poland
| 41 Portugal
| 42 Puerto Rico
| 43 Romania
| 44 South Korea
| 45 Spain
| 46 Taiwan
| 47 Thailand
| 48 Trinidad and Tobago
| 49 Ukraine
| 50 United Kingdom
| 52 Venezuela
| 53 Vietnam
| 54 Other (please specify):
|
| **I16PGF_other** other
|
| String
|
| [End of table display]
ENDIF

I17 speak language other than English
Do you speak any language other than English?
1 Yes
2 No

IF speak language other than English = Yes THEN
|
| [The following questions are displayed as a table]
|
| **I17a** what language
| What is this language? If you speak more than one other language, please indicate the language that
| you consider to be your native language. If English is your native language, please indicate the
| language you consider yourself most fluent in.
| 1 Albanian
| 2 Arabic
| 3 Armenian
| 4 Chinese
| 5 Czech
| 6 Dravidian
| 7 Dutch
| 8 Filipino
| 9 Tagalog
| 10 French
| 11 German
| 12 Greek
| 13 Hebrew, Israeli
| 14 Hindi and related
| 15 Italian
| 16 Japanese

| 17 Korean
| 18 Magyar, Hungarian
| 19 Micronesian, Polynesian
| 20 Navajo
| 21 Persian, Iranian, Farsi
| 22 Polish
| 23 Portuguese
| 24 Rumanian
| 25 Russian
| 26 Serbo-Croatian, Yugoslavian, Slavonian
| 27 Spanish
| 28 Swedish
| 29 Thai, Siamese, Lao
| 30 Tibetan
| 31 Turkish
| 32 Ukrainian, Ruthenian, Little Russian
| 33 Vietnamese
| 34 Yiddish, Jewish
| 35 Other (please specify):
|
| **I17a_other** other
|
| String
|
| [End of table display]
|
| **I17b** how well speak language
| How well do you speak []?
| 1 Very well
| 2 Well
| 3 Not well
| 4 Not at all
|
ENDIF

I17c language other than English spoken in your home
Is any language other than English spoken in your home by you or other members of your household?
1 Yes
2 No

IF language other than English spoken in your home = Yes THEN
|
| [The following questions are displayed as a table]
|
| **I17e** what language
| What is this language?
| 1 Albanian
| 2 Arabic
| 3 Armenian
| 4 Chinese
| 5 Czech
| 6 Dravidian
| 7 Dutch
| 8 Filipino

| 9 Tagalog
| 10 French
| 11 German
| 12 Greek
| 13 Hebrew, Israeli
| 14 Hindi and related
| 15 Italian
| 16 Japanese
| 17 Korean
| 18 Magyar, Hungarian
| 19 Micronesian, Polynesian
| 20 Navajo
| 21 Persian, Iranian, Farsi
| 22 Polish
| 23 Portuguese
| 24 Rumanian
| 25 Russian
| 26 Serbo-Croatian, Yugoslavian, Slavonian
| 27 Spanish
| 28 Swedish
| 29 Thai, Siamese, Lao
| 30 Tibetan
| 31 Turkish
| 32 Ukrainian, Ruthenian, Little Russian
| 33 Vietnamese
| 34 Yiddish, Jewish
| 35 Other (please specify):
|
| **I17e_other** other
|
| String
|
| [End of table display]
ENDIF

SA1 good at mathematics
How strongly do you agree or disagree with the following statement? I am good at mathematics.
1 Strongly agree
2 Somewhat agree
3 Neither agree nor disagree
4 Somewhat disagree
5 Strongly disagree

SA2 confident about financial matters
How strongly do you agree or disagree with the following statement? I am confident about dealing with day-to-day financial matters, such as checking accounts, credit cards, mortgages, installment payments and budgeting.
1 Strongly agree
2 Somewhat agree
3 Neither agree nor disagree
4 Somewhat disagree
5 Strongly disagree

SA3 like to take risks

How strongly do you agree or disagree with the following statement? I am someone who likes to take risks.
1 Strongly agree
2 Somewhat agree
3 Neither agree nor disagree
4 Somewhat disagree
5 Strongly disagree

SA4 assess financial products
How strongly do you agree or disagree with the following statement? I am able to access financial products, services and professionals that meet all my financial needs.
1 Strongly agree
2 Somewhat agree
3 Neither agree nor disagree
4 Somewhat disagree
5 Strongly disagree

SA5 financial needs
How strongly do you agree or disagree with the following statement? I am confident that I could come up with a sum of $2000 if an unexpected need arose in the next month.
1 Strongly agree
2 Somewhat agree
3 Neither agree nor disagree
4 Somewhat disagree
5 Strongly disagree

IF CURRENT JOB STATUS = Retired THEN
|
| **P2a** think about planning financially for retirement
| Before retiring, how much did you think about planning financially for retirement?
| 1 Hardly at all
| 2 A little
| 3 Some
| 4 A lot
| 5 I don't know
|
| [The following questions are displayed as a table]
|
| **P2b** how made retirement decisions
| How did you make decisions about savings and investment related to retirement?
| 1 Ask relatives/friends
| 2 Talk to financial planners/brokers
| 3 Talk to lawyers
| 4 Read magazines/newspapers/books
| 5 Get advice from television
| 6 Other (please specify):
|
| **P2b_other** other
|
| String
|
| [End of table display]
| **P2c** confident financial needs
| How strongly do you agree or disagree with the following statement? I am confident that I have

| planned and saved adequately to cover my financial needs in retirement.
| 1 Strongly agree
| 2 Somewhat agree
| 3 Neither agree nor disagree
| 4 Somewhat disagree
| 5 Strongly disagree
|
| **P2d** family support
| How strongly do you agree or disagree with the following statement? In retirement, I rely on my
| own financial resources rather than family support.
| 1 Strongly agree
| 2 Somewhat agree
| 3 Neither agree nor disagree
| 4 Somewhat disagree
| 5 Strongly disagree
|
ELSE
|
| **P3a** thought about planning financially for retirement
| How much have you thought about planning financially for retirement?
| 1 Hardly at all
| 2 A little
| 3 Some
| 4 A lot
| 5 I don't know
|
| [The following questions are displayed as a table]
|
| **P3b** how make retirement decisions
| How do you make decisions about savings and investment related to retirement? Choose all that apply.
| 1 Ask relatives/friends
| 2 Talk to financial planners/brokers
| 3 Talk to lawyers
| 4 Read magazines/newspapers/books
| 5 Get advice from television
| 6 Other (please specify):
|
| **P3b_other** other
|
| String
|
| [End of table display]
| **P3c** confident financial needs
| How strongly do you agree or disagree with the following statement? I am confident that I am
| planning and saving adequately to cover my financial needs in retirement.
| 1 Strongly agree
| 2 Somewhat agree
| 3 Neither agree nor disagree
| 4 Somewhat disagree
| 5 Strongly disagree
|
| **P3d** financial support
| How strongly do you agree or disagree with the following statement? In retirement, I expect to
| rely on my own financial resources rather than family support.

| 1 Strongly agree
| 2 Somewhat agree
| 3 Neither agree nor disagree
| 4 Somewhat disagree
| 5 Strongly disagree
|
| **P4** amount set aside for retirement
| In total, of all your savings and investments, about how much money would you say you have set aside
| for your retirement at this moment?
| Integer
|
ENDIF

earnings_intro earnings intro
We are interested in how people are getting along financially these days. The next questions are about
income you and other members of your household receive.

E1 total income last 12 months
First, we'd like to know about your total household income. About how much in total did you and all
other members of your household receive in the last twelve months from all income sources, before taxes
and other deductions?
Integer

IF total income last 12 months = empty THEN
|
| **E1a** total income last 12 months
| About how much in total did you and all other members of your household receive in the last twelve
| months from all income sources, before taxes and other deductions?
| 1 $0 - $5000
| 2 $5000 - $10,000
| 3 $10,000 - $25,000
| 4 $25,000 - $50,000
| 5 $50,000 - $100,000
| 6 More than $100,000
|
| [The following questions are displayed as a table]
|
| **E2a_intro** income source intro percentage
| We are interested in the various sources of income that you and other members of your household
| received. Of your total income what percentage is from:
|
| **E2aa** Wage and Salary earnings
| Wage and Salary earnings
| Real
|
| **E2ab** Self-employment earnings
| Self-employment earnings
| Real
|
| **E2ac** Other sources of earnings such as from odd jobs, royalties, trust fund income, bonuses, commissions,
investment income
| Other sources of earnings such as from odd jobs, royalties, trust fund income, bonuses, commissions,
| investment income
| Real

|
| **E2ad** Alimony or child support payments
| Alimony or child support payments
| Real
|
| **E2ae** Unemployment compensation (income you receive from a government because you are unemployed or out of work)
| Unemployment compensation (income you receive from a government because you are unemployed or out of
| work)
| Real
|
| **E2af** Worker's compensation or other compensation due to an injury at work
| Worker's compensation or other compensation due to an injury at work
| Real
|
| **E2ag** United States Social Security payments
| United States Social Security payments
| Real
|
| **E2ah** Retirement pension payments, including from working for a state, local or federal government in the United States or elsewhere
| Retirement pension payments, including from working for a state, local or federal government in the
| United States or elsewhere
| Real
|
| **E2ai** Foreign government pension payments (other than retirement pension payments)
| Foreign government pension payments (other than retirement pension payments)
| Real
|
| **E2aj** Supplemental Security Income (also called SSI) payments
| Supplemental Security Income (also called SSI) payments
| Real
|
| **E2ak** Disability payments from a government or other source
| Disability payments from a government or other source
| Real
|
| **E2al** Dollar value of U.S. government food stamps or Supplemental Food Program for Women, Infants, and Children (also called WIC)
| Dollar value of U.S. government food stamps or Supplemental Food Program for Women, Infants, and
| Children (also called WIC)
| Real
|
| **E2am** Other welfare/assistance program payments from a government source
| Other welfare/assistance program payments from a government source
| Real
|
| **E2an** Payments from any other sources not included above
| Payments from any other sources not included above (please specify):
| Real
|
| **E2an_other** Payments from any other sources not included above other
|
| String

|
| [End of table display]
| IF Wage and Salary earnings + Self-employment earnings + Other sources of earnings such as from odd
| jobs, royalties, trust fund income, bonuses, commissions, investment income + Alimony or child
| support payments + Unemployment compensation (income you receive from a government because you are
| unemployed or out of work) + Worker's compensation or other compensation due to an injury at work
| + United States Social Security payments + Retirement pension payments, including from working for a
| state, local or federal government in the United States or elsewhere + Foreign government pension
| payments (other than retirement pension payments) + Supplemental Security Income (also called SSI)
| payments + Disability payments from a government or other source + Dollar value of U.S. government
| food stamps or Supplemental Food Program for Women, Infants, and Children (also called WIC) + Other
| welfare/assistance program payments from a government source + Payments from any other sources not
| included above != 100 THEN
| |
| | **check100** check 100%
| | Your total does not add up to 100%. Your answers are important to us. Please go back and change
| | your answer.
| |
| ENDIF
|
ELSE
|
| [The following questions are displayed as a table]
|
| **E2_intro** income source intro $
| We are interested in the various sources of your total income that you reported in the previous
| question. About how much did you and other members of your household receive in the last twelve
| months from the following income sources, before taxes and other deductions?
|
| **E2a** Wage and Salary earnings
| Wage and Salary earnings
| Integer
|
| **E2b** Self-employment earnings
| Self-employment earnings
| Integer
|
| **E2c** Other sources of earnings such as from odd jobs, royalties, trust fund income, bonuses, commissions,
investment income
| Other sources of earnings such as from odd jobs, royalties, trust fund income, bonuses, commissions,
| investment income
| Integer
|
| **E2d** Alimony or child support payments
| Alimony or child support payments
| Integer
|
| **E2e** Unemployment compensation (income you receive from a government because you are unemployed or out of
work)
| Unemployment compensation (income you receive from a government because you are unemployed or out of
| work)
| Integer
|
| **E2f** Worker's compensation or other compensation due to an injury at work

| Worker's compensation or other compensation due to an injury at work
| Integer
|
| **E2g** United States Social Security payments
| United States Social Security payments
| Integer
|
| **E2h** Retirement pension payments, including from working for a state, local or federal government in the United
States or elsewhere
| Retirement pension payments, including from working for a state, local or federal government in the
| United States or elsewhere
| Integer
|
| **E2i** Foreign government pension payments (other than retirement pension payments)
| Foreign government pension payments (other than retirement pension payments)
| Integer
|
| **E2j** Supplemental Security Income (also called SSI) payments
| Supplemental Security Income (also called SSI) payments
| Integer
|
| **E2k** Disability payments from a government or other source
| Disability payments from a government or other source
| Integer
|
| **E2l** Dollar value of U.S. government food stamps or Supplemental Food Program for Women, Infants, and
Children (also called WIC)
| Dollar value of U.S. government food stamps or Supplemental Food Program for Women, Infants, and
| Children (also called WIC)
| Integer
|
| **E2m** Other welfare/assistance program payments from a government source
| Other welfare/assistance program payments from a government source
| Integer
|
| **E2n** Payments from any other sources not included above
| Payments from any other sources not included above
| Integer
|
| [End of table display]
ENDIF

I18 financial assistance given
You may have family, relatives or friends who do not live with you and live outside the United States.
During the last twelve months, how much financial assistance did you give, if any, to all your
family, relatives and friends during periods when they were not living with you and while they were
living outside the U.S.? If none, enter zero.
Integer

IF financial assistance given < THEN
|
| **checkNegative** check for negative value
| You have entered a negative value. Your answers are important to us. Please go back and change your
| answer.

|
ENDIF

IF financial assistance given != empty and financial assistance given != THEN
|
| [The following questions are displayed as a table]
|
| **I18a** how you sent remittances
| How did you send most of those payments or remittances abroad?
| 1 Through a commercial bank
| 2 Through a remittance or money transfer carrier
| 3 Through friends or family
| 4 Through the mail
| 5 Other (specify):
|
| **I18a_other** other
|
| String
|
| [End of table display]
ENDIF

I19 financial assistance received
During the last twelve months, how much financial assistance did you receive, if any, from all your family, relatives and friends during periods when they were not living with you and while they were living outside the U.S.? If none, enter zero.
Integer

IF financial assistance received < THEN
|
| **checkNegative** check for negative value
| You have entered a negative value. Your answers are important to us. Please go back and change your
| answer.
|
ENDIF

IF financial assistance received != empty and financial assistance received != THEN
|
| [The following questions are displayed as a table]
|
| **I19a** how send remittances to you
| How did they send most of those payments or remittances to you from abroad?
| 1 Through a commercial bank
| 2 Through a remittance or money transfer carrier
| 3 Through friends or family
| 4 Through the mail
| 5 Other (specify):
|
| **I19a_other** other
|
| String
|
| [End of table display]
ENDIF

E3 expenses
Over the past year, have your household's monthly expenses (not including the purchase of a new house or car or other big investments) been greater, equal or less than your household income?
1 Greater
2 Equal
3 Less

E4 insurance
Please indicate if you are currently covered by any of the types of insurance below, whether through your employer, self-purchase, or provided by the government. Choose all that apply.
1 Health insurance
2 Life insurance
3 Vehicle insurance
4 Long-term care insurance
5 Homeowners/renters insurance

assets_intro assets intro
The next questions ask about a number of different kinds of savings or investments you may have, as well as different types of debts.

AL1 own or rent
Do you own the place that your are living in, rent it, or what?
1 Own
2 Rent
3 Live for free

IF own or rent = Own THEN
|
| **AL1a** present value
| What is its present value - about what would it bring in if it were sold today? Enter 0 if none.
| Integer
|
| IF present value < THEN
| |
| | **checkNegative** check for negative value
| | You have entered a negative value. Your answers are important to us. Please go back and change your
| | answer.
| |
| ENDIF
|
| **AL1b** owe on mortgage
| About how much do you still owe on the mortgage or land contract? Enter 0 if none.
| Integer
|
| IF owe on mortgage < THEN
| |
| | **checkNegative** check for negative value
| | You have entered a negative value. Your answers are important to us. Please go back and change your
| | answer.
| |
| ENDIF
|
| **AL1c** owe on second mortgage

| About how much do you still owe on any second mortgage and any other loans? Enter 0 if none.
| Integer
|
| IF owe on second mortgage < THEN
| |
| | **checkNegative** check for negative value
| | You have entered a negative value. Your answers are important to us. Please go back and change your
| | answer.
| |
| ENDIF
|
| **AL1d** owe on home equity lines of credit
| About how much do you owe on any home equity lines of credit related to this property? Enter 0 if
| none.
| Integer
|
| IF owe on home equity lines of credit < THEN
| |
| | **checkNegative** check for negative value
| | You have entered a negative value. Your answers are important to us. Please go back and change your
| | answer.
| |
| ENDIF
|
ENDIF

AL2 own any other homes or condos
Not including investment property and this home you are now living in, do you own any other homes or
condos?
1 Yes
2 No

IF own any other homes or condos = Yes THEN
|
| **AL2a** present value
| Taking all your other homes together, what are their present value - about what would they bring in
| if it were sold today? Enter 0 if none.
| Integer
|
| IF present value < THEN
| |
| | **checkNegative** check for negative value
| | You have entered a negative value. Your answers are important to us. Please go back and change your
| | answer.
| |
| ENDIF
|
| **AL2b** how much you owe
| Taking all mortgages owned on your other homes together, how much do you still owe on these
| properties? Enter 0 if none.
| Integer
|
| IF how much you owe < THEN
| |

|| **checkNegative** check for negative value
|| You have entered a negative value. Your answers are important to us. Please go back and change your
|| answer.
||
| ENDIF
|
| **AL2c** homes located outside US
| Are any of these homes located outside the United States?
| 1 Yes
| 2 No
|
| IF homes located outside US = Yes THEN
||
|| [The following questions are displayed as a table]
||
|| **AL2d** countries
|| What countries? Choose all that apply.
|| 51 United States of America
|| 1 Argentina
|| 2 Brazil
|| 3 Cambodia
|| 4 Canada
|| 5 China
|| 6 Colombia
|| 7 Cuba
|| 8 Dominican Republic
|| 9 Ecuador
|| 10 Egypt
|| 11 El Salvador
|| 12 England
|| 13 France
|| 14 Germany
|| 15 Greece
|| 16 Guatemala
|| 17 Guyana/British Guiana
|| 18 Haiti
|| 19 Honduras
|| 20 Hong Kong
|| 21 India
|| 22 Iran
|| 23 Ireland
|| 24 Israel/Palestine
|| 25 Italy
|| 26 Jamaica
|| 27 Japan
|| 28 Korea
|| 29 Laos
|| 30 Lebanon
|| 31 Mexico
|| 32 Netherlands
|| 33 Nicaragua
|| 34 Nigeria
|| 35 Russia
|| 36 Pakistan

|| 37 Panama
|| 38 Peru
|| 39 Philippines
|| 40 Poland
|| 41 Portugal
|| 42 Puerto Rico
|| 43 Romania
|| 44 South Korea
|| 45 Spain
|| 46 Taiwan
|| 47 Thailand
|| 48 Trinidad and Tobago
|| 49 Ukraine
|| 50 United Kingdom
|| 52 Venezuela
|| 53 Vietnam
|| 54 Other (please specify):
||
|| **AL2d_other** other
||
|| String
||
|| [End of table display]
| ENDIF
|
ENDIF

AL3 real estate investment
Do you have any real estate, other than your main home or second homes held for investment such as
land, rental real estate, a partnership, or money owed to you on a land contract or mortgage?
1 Yes
2 No

IF real estate investment = Yes THEN
|
| **AL3a** real estate value
| If you sold all of your real estate of this type and then paid off any debts on it, about how much
| would you get? Enter 0 if none.
| Integer
|
| IF real estate value < THEN
||
|| **checkNegative** check for negative value
|| You have entered a negative value. Your answers are important to us. Please go back and change your
|| answer.
||
| ENDIF
|
| **AL3b** income from rents
| Aside from any other income you have already told us about, before any expenses or deductions, did
| you receive any income such as rents from these properties in the last twelve months? Enter 0 if
| none or if you have already included this in your previous answers.
| Integer
|

| IF income from rents < THEN
||
|| **checkNegative** check for negative value
|| You have entered a negative value. Your answers are important to us. Please go back and change your
|| answer.
||
| ENDIF
|
| **AL3c** properties outside US
| Are any of these properties located outside the United States?
| 1 Yes
| 2 No
|
| IF properties outside US = Yes THEN
||
|| [The following questions are displayed as a table]
||
|| **AL3d** countries
|| What countries? Choose all that apply.
|| 51 United States of America
|| 1 Argentina
|| 2 Brazil
|| 3 Cambodia
|| 4 Canada
|| 5 China
|| 6 Colombia
|| 7 Cuba
|| 8 Dominican Republic
|| 9 Ecuador
|| 10 Egypt
|| 11 El Salvador
|| 12 England
|| 13 France
|| 14 Germany
|| 15 Greece
|| 16 Guatemala
|| 17 Guyana/British Guiana
|| 18 Haiti
|| 19 Honduras
|| 20 Hong Kong
|| 21 India
|| 22 Iran
|| 23 Ireland
|| 24 Israel/Palestine
|| 25 Italy
|| 26 Jamaica
|| 27 Japan
|| 28 Korea
|| 29 Laos
|| 30 Lebanon
|| 31 Mexico
|| 32 Netherlands
|| 33 Nicaragua
|| 34 Nigeria

|| 35 Russia
|| 36 Pakistan
|| 37 Panama
|| 38 Peru
|| 39 Philippines
|| 40 Poland
|| 41 Portugal
|| 42 Puerto Rico
|| 43 Romania
|| 44 South Korea
|| 45 Spain
|| 46 Taiwan
|| 47 Thailand
|| 48 Trinidad and Tobago
|| 49 Ukraine
|| 50 United Kingdom
|| 52 Venezuela
|| 53 Vietnam
|| 54 Other (please specify):
||
|| **AL3d_other** other
||
|| String
||
|| [End of table display]
| ENDIF
|
ENDIF

AL4 own part of any business or farm
Do you own part of any business or farm?
1 Yes
2 No

IF own part of any business or farm = Yes THEN
|
| **AL4a** business or farm value
| If you sold the part of the businesses or farms you own and then paid off any debts on it, about how
| much would you get? Enter 0 if none.
| Integer
|
| IF business or farm value < THEN
||
|| **checkNegative** check for negative value
|| You have entered a negative value. Your answers are important to us. Please go back and change your
|| answer.
||
| ENDIF
|
| **AL4b** income from businesses or farms
| Aside from any other income you have already told us about, before any expenses or deductions, did
| you receive any income from these businesses or farms in the last twelve months? Enter 0 if none
| or if you have already included this in your previous answers.
| Integer

|
| IF income from businesses or farms < THEN
| |
| | **checkNegative** check for negative value
| | You have entered a negative value. Your answers are important to us. Please go back and change your
| | answer.
| |
| ENDIF
|
| **AL4c** businesses or farms outside US
| Are any of these businesses or farms located outside the United States?
| 1 Yes
| 2 No
|
| IF businesses or farms outside US = Yes THEN
| |
| | [The following questions are displayed as a table]
| |
| | **AL4d** countries
| | What countries? Choose all that apply.
| | 51 United States of America
| | 1 Argentina
| | 2 Brazil
| | 3 Cambodia
| | 4 Canada
| | 5 China
| | 6 Colombia
| | 7 Cuba
| | 8 Dominican Republic
| | 9 Ecuador
| | 10 Egypt
| | 11 El Salvador
| | 12 England
| | 13 France
| | 14 Germany
| | 15 Greece
| | 16 Guatemala
| | 17 Guyana/British Guiana
| | 18 Haiti
| | 19 Honduras
| | 20 Hong Kong
| | 21 India
| | 22 Iran
| | 23 Ireland
| | 24 Israel/Palestine
| | 25 Italy
| | 26 Jamaica
| | 27 Japan
| | 28 Korea
| | 29 Laos
| | 30 Lebanon
| | 31 Mexico
| | 32 Netherlands
| | 33 Nicaragua

|| 34 Nigeria
|| 35 Russia
|| 36 Pakistan
|| 37 Panama
|| 38 Peru
|| 39 Philippines
|| 40 Poland
|| 41 Portugal
|| 42 Puerto Rico
|| 43 Romania
|| 44 South Korea
|| 45 Spain
|| 46 Taiwan
|| 47 Thailand
|| 48 Trinidad and Tobago
|| 49 Ukraine
|| 50 United Kingdom
|| 52 Venezuela
|| 53 Vietnam
|| 54 Other (please specify):
||
|| **AL4d_other** other
||
|| String
||
|| [End of table display]
| ENDIF
|
ENDIF

AL5 own any vehicles for transportation
Do you own any vehicles for transportation, like cars, trucks, a trailer, a motor home, a boat, or an airplane?
1 Yes
2 No

IF own any vehicles for transportation = Yes THEN
|
| **AL5a** vehicles value
| What are those all worth altogether, minus anything you still owe on them? Enter 0 if none.
| Integer
|
| IF vehicles value < THEN
||
|| **checkNegative** check for negative value
|| You have entered a negative value. Your answers are important to us. Please go back and change your
|| answer.
||
| ENDIF
|
ENDIF

AL6 checking or savings accounts or money market accounts
Aside from anything you have already told us about, do you have any checking or savings accounts or

money market accounts?
1 Yes, in the US and abroad
2 Yes, only in the US
3 Yes, only abroad
4 No

IF checking or savings accounts or money market accounts = Yes, in the US and abroad or checking or savings accounts or money market accounts = Yes, only in the US or checking or savings accounts or money market accounts = Yes, only abroad THEN
|
| [The following questions are displayed as a table]
|
| **AL6a_intro** accounts intro
| If you added up all such accounts about how much would they amount to right now? Enter 0 if none.
|
| **AL6a1** US
| In the United States:
| Integer
|
| **AL6a2** abroad
| Outside the United States:
| Integer
|
| [End of table display]
| IF US < or abroad < THEN
||
|| **checkNegative** check for negative value
|| You have entered a negative value. Your answers are important to us. Please go back and change your
|| answer.
||
| ENDIF
|
| **AL6c** interest or dividends
| Aside from anything you have already told us about, before taxes and other deductions, about how much
| did you receive in the last 12 months from these accounts in interest or dividends? Enter 0 if
| none or if you have already included this in your previous answers.
| Integer
|
| IF interest or dividends < THEN
||
|| **checkNegative** check for negative value
|| You have entered a negative value. Your answers are important to us. Please go back and change your
|| answer.
||
| ENDIF
|
ENDIF

IF checking or savings accounts or money market accounts = No THEN
|
| [The following questions are displayed as a table]
|
| **AL7_intro** reasons intro
| Why don't you have a checking/savings/money market account? Please choose up to 3 reasons, Rank 1 for

| the most important, 2 for the second most important, and 3 for the third most important.
|
| **AL7a** I dont write enough checks to make it worthwhile
| I don't write enough checks to make it worthwhile
| Range: 1..3
|
| **AL7b** The minimum balance is too high
| The minimum balance is too high
| Range: 1..3
|
| **AL7c** I don't like dealing with banks
| I don't like dealing with banks
| Range: 1..3
|
| **AL7d** The fees and service charges are too high
| The fees and service charges are too high
| Range: 1..3
|
| **AL7e** I cannot manage or balance a checking account
| I cannot manage or balance a checking account
| Range: 1..3
|
| **AL7f** No bank has convenient hours or location
| No bank has convenient hours or location
| Range: 1..3
|
| **AL7g** I do not have enough money
| I do not have enough money
| Range: 1..3
|
| **AL7h** I have or (had) credit problems
| I have or (had) credit problems
| Range: 1..3
|
| **AL7i** I have privacy concerns
| I have privacy concerns
| Range: 1..3
|
| **AL7j** I have security concerns
| I have security concerns
| Range: 1..3
|
| **AL7k** I do not need/want an account
| I do not need/want an account
| Range: 1..3
|
| **AL7l** I cannot get an account from any bank
| I cannot get an account from any bank
| Range: 1..3
|
| **AL7m** Other (explain)
| Other (explain)
| Range: 1..3
|

| **AL7m_other** Other
|
| String
|
| [End of table display]
ENDIF

AL72 have any shares of stock or stock mutual funds
Do you have any shares of stock or stock mutual funds?
1 Yes
2 No

IF have any shares of stock or stock mutual funds = Yes THEN
|
| **AL72a** stocks mutual funds value
| If you sold all those and paid off anything you owed on them, about how much would you have?
| Enter 0 if none.
| Integer
|
| IF stocks mutual funds value < THEN
| |
| | **checkNegative** check for negative value
| | You have entered a negative value. Your answers are important to us. Please go back and change your
| | answer.
| |
| ENDIF
|
| **AL72b** stocks mutual funds last 12 months
| Aside from anything you have already told us about, before taxes and other deductions, about how much
| did you receive from dividends or interest on your stocks or stock mutual funds in the last twelve
| months? Enter 0 if none or if you have already included this in your previous answers.
| Integer
|
| IF stocks mutual funds last 12 months < THEN
| |
| | **checkNegative** check for negative value
| | You have entered a negative value. Your answers are important to us. Please go back and change your
| | answer.
| |
| ENDIF
|
ENDIF

AL8 bonds
Do you have any shares of corporate bonds or bond mutual funds?
1 Yes
2 No

IF bonds = Yes THEN
|
| **AL8a** bonds value
| If you sold all those and paid off anything you owed on them, about how much would you have?
| Enter 0 if none.
| Integer

|
| IF bonds value < THEN
||
|| **checkNegative** check for negative value
|| You have entered a negative value. Your answers are important to us. Please go back and change your
|| answer.
||
| ENDIF
|
| **AL8b** bonds last 12 months
| Aside from anything you have already told us about, before taxes and other deductions, about how much
| did you receive from dividends or interest on your corporate bonds or bond mutual funds in the last
| twelve months? Enter 0 if none or if you have already included this in your previous answers.
| Integer
|
| IF bonds last 12 months < THEN
||
|| **checkNegative** check for negative value
|| You have entered a negative value. Your answers are important to us. Please go back and change your
|| answer.
||
| ENDIF
|
ENDIF

AL9 CDs, Government Savings Bonds, or U.S. Treasury Bills
Aside from anything you have already told us about, do you have any money in certificates of deposits
(CDs), Government Savings Bonds, or U.S. Treasury Bills?
1 Yes
2 No

IF CDs, Government Savings Bonds, or U.S. Treasury Bills = Yes THEN
|
| **AL9a** CDs, Government Savings Bonds, or U.S. Treasury Bills value
| If you added up all such assets, about how much would they amount to right now? Enter 0
| if none.
| Integer
|
| IF CDs, Government Savings Bonds, or U.S. Treasury Bills value < THEN
||
|| **checkNegative** check for negative value
|| You have entered a negative value. Your answers are important to us. Please go back and change your
|| answer.
||
| ENDIF
|
| **AL9b** CDs, Government Savings Bonds, or U.S. Treasury Bills last 12 months
| Aside from anything you have already told us about, before taxes and other deductions, about how much
| did you receive from any other income on these CDs, Government Savings Bonds, or U.S. Treasury Bills
| in the last twelve months? Enter 0 if none or if you have already included this in your previous
| answers.
| Integer
|
| IF CDs, Government Savings Bonds, or U.S. Treasury Bills last 12 months < THEN

||
|| **checkNegative** check for negative value
|| You have entered a negative value. Your answers are important to us. Please go back and change your
|| answer.
||
| ENDIF
|
ENDIF

AL10 other savings or assets
Do you have any other savings or assets, such as jewelry, money owed to you by others, a collection for
investment purposes, or rights in a trust or estate where you are the beneficiary that you haven't
already told us about?
1 Yes
2 No

IF other savings or assets = Yes THEN
|
| **AL10a** other savings or assets value
| If you sold all that and then paid off any debts on it, about how much would you have? Enter 0 if
| none.
| Integer
|
| IF other savings or assets value < THEN
||
|| **checkNegative** check for negative value
|| You have entered a negative value. Your answers are important to us. Please go back and change your
|| answer.
||
| ENDIF
|
| **AL10b** other savings or assets last 12 months
| Aside from anything you have already told us about, before taxes and other deductions, about how much
| did you receive in the last 12 months from these other assets? Enter 0 if none or if you have
| already included this in your previous answers.
| Integer
|
| IF other savings or assets last 12 months < THEN
||
|| **checkNegative** check for negative value
|| You have entered a negative value. Your answers are important to us. Please go back and change your
|| answer.
||
| ENDIF
|
ENDIF

AL11 other debts
And do you have any other debts that we haven't asked about, such as credit card balances, medical
debts, life insurance policy loans, loans from relatives, student loans, and so forth?
1 Yes
2 No

IF other debts = Yes THEN

|
| LOOP FROM 1 TO 5 DO
| |
| | **AL11a** who borrow from
| | For up to 5 of the other debts that you have outstanding, please tell us a few more details. Other
| | debt []: Who did you borrow this money from?
| | 1 Bank
| | 2 Credit card company
| | 3 Finance company
| | 4 Payday lender
| | 5 Check casher
| | 6 Friend/Relative
| |
| | **AL11b** how much still owe
| | Other debt []: How much do you still owe? Enter 0 if none.
| | Integer
| |
| | IF how much still owe < THEN
| | |
| | | **checkNegative** check for negative value
| | | You have entered a negative value. Your answers are important to us. Please go back and change
| | | your answer.
| | |
| | ENDIF
| |
| | [The following questions are displayed as a table]
| |
| | **AL11c** current interest rate on loan
| | Other debt []: And what is the current interest rate on this loan? (Please do not add a percent
| | (%) sign, just the number)
| | Real
| |
| | **AL11c_period** period
| |
| | 1 Per week
| | 2 Per month
| | 3 Per year
| |
| | [End of table display]
| | **AL11d** other debts still not covered
| | Other debt []: Do you have any other debts outstanding that we still have not covered?
| | 1 Yes
| | 2 No
| |
| | IF other debts still not covered <> Yes THEN
| | |
| | | Exit from the loop
| | ENDIF
| |
| ENDDO
|
ENDIF

CI chronic illness

Do you have or have you experienced any of the following health problems? Choose all that apply.
1 Cancer
2 Heart disease
3 High blood pressure
4 Type 2 diabetes
5 Stroke

IF Cancer in chronic illness or Heart disease in chronic illness or High blood pressure in
chronic illness or Type 2 diabetes in chronic illness or Stroke in chronic illness THEN
|
| **CIa** pay out of pocket prescription medications
| About how much do you pay out of pocket every year in medical costs including prescription
| medications?
| Integer
|
ENDIF

IF CURRENT JOB STATUS = Working now THEN
|
| **RSP1** current employer offer any pension, retirement, or tax-deferred savings plans
| Does your current employer offer any pension, retirement, or tax-deferred savings plans to their
| employees? We are only concerned about plans offered by your current employer. Please do not include
| Social Security or plans connected only with earlier jobs.
| 1 Yes
| 2 No
|
| IF current employer offer any pension, retirement, or tax-deferred savings plans = Yes THEN
| |
| | **RSP2** defined-contribution plan
| | Is this plan a defined-contribution plan? In a defined-contribution plan, money accumulates in an
| | account designated for a worker, and that money may be paid out in a variety of ways depending on
| | the plan or the worker's choice. For example, a 401(k) plan or 403(b) plan is this type of plan.
| | 1 Yes
| | 2 No
| |
| | IF defined-contribution plan = Yes THEN
| | |
| | | **RSP3** enrolled in plan
| | | Are you enrolled in this plan? Remember, we are only concerned about the plan offered by your
| | | current employer. Please do not include any other retirement accounts such as IRAs that you have
| | | set up on your own.
| | | 1 Yes
| | | 2 No
| | |
| | | IF enrolled in plan = Yes THEN
| | | |
| | | | **RSP4** current total balance in this plan
| | | | What is the current total balance in this plan? If you do not know, please give us your best
| | | | guess.
| | | | Integer
| | | |
| | | | IF current total balance in this plan < THEN
| | | | |
| | | | | **checkNegative** check for negative value

||||| You have entered a negative value. Your answers are important to us. Please go back and
||||| change your answer.
|||||
|||| ENDIF
||||
|||| [The following questions are displayed as a table]
||||
|||| **RSP5_intro** investment types intro
|||| Thinking about your account, can you tell me what is the approximate share of investment types
||||| in these accounts?
||||
|||| **RSP5_stocks** Stocks or stock mutual funds
||| Stocks or stock mutual funds
|||| Integer
||||
|||| **RSP5_bonds** Bonds or bond mutual funds
|||| Bonds or bond mutual funds
|||| Integer
||||
|||| **RSP5_cash** Cash, T-bills, money-market funds
|||| Cash, T-bills, money-market funds
|||| Integer
||||
|||| **RSP5_other** other assets
|||| Other assets
|||| Integer
||||
|||| [End of table display]
|||| **RSP6** choices
|||| Does this plan offer employees any choices about how the money in their account is invested?
|||| 1 Yes
|||| 2 No
||||
||| ELSE
||||
|||| **RSP3a** why not enrolled in plan
|||| Why are you not enrolled in this plan?
|||| 1 Plan to enroll but not yet eligible
|||| 2 Not enough income to enroll
|||| 3 Not relevant to my circumstances
|||| 4 Too difficult to sign up
|||| 5 Don't trust the plan provider
|||| 6 Do not like the features and options of the plan and have a preferred other option for retirement savings
|||| 7 Do not understand the plan rules and options
|||| 8 Concerned about restrictions such as ability to withdraw money in the future
||||
||| ENDIF
|||
||| **RSP7** money or assets held in retirement savings plans from previous employers
||| Apart from this plan, do you currently have any money or assets that are held in retirement
||| savings plans from previous employers? Do not include IRAs or KEOGH plans
||| 1 Yes
||| 2 No
|||

||| IF money or assets held in retirement savings plans from previous employers = Yes THEN
||||
|||| **RSP7a** assets that are held in retirement savings plans from previous employers amount
|||| If you added up all the balances in such plans, about how much would they amount to right now?
|||| Integer
||||
|||| IF assets that are held in retirement savings plans from previous employers amount < THEN
|||||
||||| **checkNegative** check for negative value
||||| You have entered a negative value. Your answers are important to us. Please go back and
||||| change your answer.
|||||
|||| ENDIF
||||
||| ENDIF
|||
||| **RSP8** tax-advantaged
||| Do you currently have any money or assets that are held in other tax-advantaged retirement
||| savings plans such as IRA or KEOGH plans?
||| 1 Yes
||| 2 No
|||
||| IF tax-advantaged = Yes THEN
||||
|||| **RSP8a** tax-advantaged amount
|||| If you added up all the balances in such accounts, about how much would they amount to right
|||| now?
|||| Integer
||||
|||| IF tax-advantaged amount < THEN
|||||
||||| **checkNegative** check for negative value
||||| You have entered a negative value. Your answers are important to us. Please go back and
||||| change your answer.
|||||
|||| ENDIF
||||
|||| **RSP8b** tax-advantaged lat 12 months
|||| Aside from anything you have already told us about, before taxes and other deductions, about
|||| how much income did you receive from these IRA and/or KEOGH accounts in the last twelve months?
||||
|||| Integer
||||
|||| IF tax-advantaged lat 12 months < THEN
|||||
||||| **checkNegative** check for negative value
||||| You have entered a negative value. Your answers are important to us. Please go back and
||||| change your answer.
|||||
|||| ENDIF
||||
|||| **RSP8c** tax-advanteged abroad
|||| Are any of these accounts held outside the United States?
||||| 1 Yes

| | | | 2 No
| | | |
| | | | IF tax-advanteged abroad = Yes THEN
| | | | |
| | | | | [The following questions are displayed as a table]
| | | | |
| | | | | **RSP8d** tax-advantages countries
| | | | | What countries? Choose all that apply.
| | | | | 51 United States of America
| | | | | 1 Argentina
| | | | | 2 Brazil
| | | | | 3 Cambodia
| | | | | 4 Canada
| | | | | 5 China
| | | | | 6 Colombia
| | | | | 7 Cuba
| | | | | 8 Dominican Republic
| | | | | 9 Ecuador
| | | | | 10 Egypt
| | | | | 11 El Salvador
| | | | | 12 England
| | | | | 13 France
| | | | | 14 Germany
| | | | | 15 Greece
| | | | | 16 Guatemala
| | | | | 17 Guyana/British Guiana
| | | | | 18 Haiti
| | | | | 19 Honduras
| | | | | 20 Hong Kong
| | | | | 21 India
| | | | | 22 Iran
| | | | | 23 Ireland
| | | | | 24 Israel/Palestine
| | | | | 25 Italy
| | | | | 26 Jamaica
| | | | | 27 Japan
| | | | | 28 Korea
| | | | | 29 Laos
| | | | | 30 Lebanon
| | | | | 31 Mexico
| | | | | 32 Netherlands
| | | | | 33 Nicaragua
| | | | | 34 Nigeria
| | | | | 35 Russia
| | | | | 36 Pakistan
| | | | | 37 Panama
| | | | | 38 Peru
| | | | | 39 Philippines
| | | | | 40 Poland
| | | | | 41 Portugal
| | | | | 42 Puerto Rico
| | | | | 43 Romania
| | | | | 44 South Korea
| | | | | 45 Spain

| | | | | 46 Taiwan
| | | | | 47 Thailand
| | | | | 48 Trinidad and Tobago
| | | | | 49 Ukraine
| | | | | 50 United Kingdom
| | | | | 52 Venezuela
| | | | | 53 Vietnam
| | | | | 54 Other (please specify):
| | | | |
| | | | | **RSP8d_other** other
| | | | |
| | | | | String
| | | | |
| | | | | [End of table display]
| | | | ENDIF
| | | |
| | | ENDIF
| | |
| | ENDIF
| |
| ENDIF
|
ENDIF

IF enrolled in plan = Yes THEN
|
| **employer_intro** employer intro
| Thank you! Now we would like to ask a few more questions about the retirement savings plan offered
| through your employer.
|
| **RSB1** 2010 make contributions to account
| In 2010, last year, did you make any contributions to your account?
| 1 Yes
| 2 No
|
| IF 2010 make contributions to account = Yes THEN
| |
| | **RSB1a** plan contribution during 2010 as a percentage of your salary
| | What was your plan contribution during 2010 as a percentage of your salary?
| | Real
| |
| | IF total dollar contribution during 2010 < THEN
| | |
| | | **checkNegative** check for negative value
| | | You have entered a negative value. Your answers are important to us. Please go back and change
| | | your answer.
| | |
| | ENDIF
| |
| | **RSB1b** total dollar contribution during 2010
| | What was your total dollar contribution during 2010?
| | Integer
| |
| | **RSB1c** maximum allowable dollar contribution

|| Was this the maximum allowable dollar contribution?
|| 1 Yes
|| 2 No
||
| ENDIF
|
| **RSB2** how often check performance of investments in your account
| Normally, how often do you check on the performance of the investments in your account?
| 1 Monthly or more frequently
| 2 Quarterly
| 3 Yearly
| 4 Almost never
|
| IF choices = Yes THEN
||
|| **RSB2a** how often change allocation of investments in your account
|| Normally, how often do you change the allocation of the investments in your account?
|| 1 Monthly or more frequently
|| 2 Quarterly
|| 3 Yearly
|| 4 Almost never
||
| ENDIF
|
| **RSB3** 2010 pre-retirement withdrawals from defined contribution plan
| In 2010 did you make any pre-retirement withdrawals from your defined contribution plan for any
| reason?
| 1 Yes
| 2 No
|
| IF 2010 pre-retirement withdrawals from defined contribution plan = Yes THEN
||
|| **RSB3a** how much withdraw
|| How much did you withdraw?
|| Integer
||
|| IF how much withdraw < THEN
|||
||| **checkNegative** check for negative value
||| You have entered a negative value. Your answers are important to us. Please go back and change
||| your answer.
|||
|| ENDIF
||
|| [The following questions are displayed as a table]
||
|| **RSB3b** why make withdrawl
|| Why did you make the withdrawal?
|| 1 Medical expenses
|| 2 House purchase
|| 3 Educational expenses
|| 4 Mortgage payments
|| 5 Paying down other debt, such as credit-card debt
|| 6 Financial investments

|| 7 Rolling over into another account
|| 8 Day-to-day expenses
|| 9 Other (please specify):
||
|| **RSB3b_other** other
||
|| String
||
|| [End of table display]
| ENDIF
|
| **RSB4** 2010 borrow from defined contribution plan
| In 2010 did you borrow from your defined contribution plan for any reason?
| 1 Yes
| 2 No
|
| IF 2010 borrow from defined contribution plan = Yes THEN
||
|| **RSB4a** how much borrow
|| How much did you borrow?
|| Integer
||
|| IF how much borrow < THEN
|||
||| **checkNegative** check for negative value
||| You have entered a negative value. Your answers are important to us. Please go back and change
||| your answer.
|||
|| ENDIF
||
|| [The following questions are displayed as a table]
||
|| **RSB4b** why take loan
|| Why did you take the loan?
|| 1 Medical expenses
|| 2 House purchase
|| 3 Educational expenses
|| 4 Mortgage payments
|| 5 Paying down other debt, such as credit-card debt
|| 6 Financial investments
|| 7 Rolling over into another account
|| 8 Day-to-day expenses
|| 9 Other (please specify):
||
|| **RSB4b_other** other
||
|| String
||
|| [End of table display]
| ENDIF
|
| **RPD7** employer's plan automatically enroll all eligible employees by default
| Does your employer's plan automatically enroll all eligible employees by default, unless you choose
| otherwise?

| 1 Yes
| 2 No
| 3 Don't know
|
| **RPD8** employer's plan provide a base contribution
| Does your employer's plan provide a base contribution (through profit sharing or otherwise) to all
| eligible employees?
| 1 Yes
| 2 No
| 3 Don't know
|
| IF employer's plan provide a base contribution = Yes THEN
| |
| | **RPD8a** base contribution rate from your employer
| | What is the base contribution rate from your employer?
| | Real
| |
| ENDIF
|
| **RPD9** matching contribution
| Does your employer's plan provide a matching contribution?
| 1 Yes
| 2 No
| 3 Don't know
|
| IF matching contribution = Yes THEN
| |
| | **RPD9a** matching contribution rate
| | What is the matching contribution rate from your employer?
| | Real
| |
| ENDIF
|
| **RPD10** default contribution rate
| Does your employer's plan automatically set a certain contribution rate for its employees by default,
| unless you choose otherwise?
| 1 Yes
| 2 No
| 3 Don't know
|
| IF default contribution rate = Yes THEN
| |
| | **RPD10a** default contribution rate
| | What is the default contribution rate from your employer?
| | Real
| |
| ENDIF
|
| **RPD11** automatically increase your contributions by default
| Does your employer's plan automatically increase your contributions by default, unless you choose
| otherwise?
| 1 Yes
| 2 No
| 3 Don't know

|
| **RPD12** target date
| Does your employer's plan provide a target date or lifecycle fund option?
| 1 Yes
| 2 No
| 3 Don't know
|
ENDIF

BF1 $100 2% 5 years
Suppose you had $100 in a savings account and the interest rate was 2% per year. After 5 years, how much do you think you would have in the account if you left the money to grow?
1 More than $102
2 Exactly $102
3 Less than $102
4 I don't know

BF2 $100 20% 5 years
Suppose you had $100 in a savings account and the interest rate is 20% per year and you never withdraw money or interest payments. After 5 years, how much would you have in this account in total?
1 More than $200
2 Exactly $200
3 Less than $200
4 I don't know

BF3 interest 1% inflation 2% 1 year
Imagine that the interest rate on your savings account was 1% per year and inflation was 2% per year. After 1 year, how much would you be able to buy with the money in this account?
1 More than today
2 Exactly the same
3 Less than today
4 I don't know

BF4 friend $10000 today sibling $10000 3 years
Assume a friend inherits $10,000 today and his sibling inherits $10,000 three years from now. Who is richer because of the inheritance?
1 My friend
2 His sibling
3 They are equally rich
4 I don't know

IN1 interest rates bond prices
If interest rates fall, what should happen to bond prices?
1 They should rise
2 They should fall
3 They should stay the same
4 I don't know

IN2 long time period highest return
Considering a long time period (for example 10 or 20 years), which asset normally gives the highest return?
1 Savings accounts
2 Bonds
3 Stocks

4 I don't know

IN3 highest fluctuations
Normally, which asset displays the highest fluctuations over time?
1 Savings accounts
2 Bonds
3 Stocks
4 I don't know

IN4 spread money risk of losing
When an investor spreads his money among different assets, does the risk of losing money:
1 Increase
2 Decrease
3 Stay the same
4 I don't know

IN5 $1000 stock mutual fund less than $1000 withdraw
If you were to invest $1000 in a stock mutual fund, it would be possible to have less than $1000 when you withdraw your money.
1 True
2 False
3 I don't know

ira_intro ira intro
Now, we would like to ask you some questions about some features of retirement savings accounts that apply to 401(k) and IRAs in general. We are not asking about the features of specific 401(k)s or IRAs that you or your household own.

IRA1 after 59 1/2 no tax
A person who withdraws money from a standard 401(k) plan or IRA after he turns 59½ does not pay taxes on the money that he withdraws.
1 True
2 False
3 I don't know

IRA2 non US citizen living abroad
A previous immigrant to the US now living abroad can hold a standard 401(k) plan or IRA in the United States if he has worked in this country in the past.
1 True
2 False
3 I don't know

IRA2a non US citizen living abroad 59 1/2 no tax
If a previous immigrant to the US now living abroad withdraws money from a standard 401(k) plan or IRA held in the U.S. after he turns 59½, he will not need to pay taxes in the US or his home country on the money that he withdraws.
1 True
2 False
3 I don't know

IRA3 defined contribution plan not eligible
A person who has a defined contribution plan through work (like a 401(k) or 403(b) plan) is not eligible to open or deposit money into an IRA.
1 True

2 False
3 I don't know

IRA4 financial hardship
If you are undergoing any financial hardship, you will not incur an extra penalty if you withdraw money from a 401(k) plan or IRA before the age of 59½.
1 True
2 False
3 I don't know

IRA5 70 1/2 withdraw
After age 70½, you have to withdraw at least some money from your 401(k) plan or IRA.
1 True
2 False
3 I don't know

IRA6 lose your job
If you lose your job while holding an outstanding loan from your 401(k) plan:
1 You can still continue to pay for the loan as before.
2 You are no longer responsible for paying back the loan.
3 The loan will be treated as a withdrawal if not paid back promptly, resulting in taxes and penalties.
4 I don't know

[The following questions are displayed as a table]

TF1a The stock market
The stock market
1 1 I do not trust at all
2 2
3 3
4 4
5 5 I trust completely

TF1b Banks
Banks
1 1 I do not trust at all
2 2
3 3
4 4
5 5 I trust completely

TF1c Insurance companies
Insurance companies
1 1 I do not trust at all
2 2
3 3
4 4
5 5 I trust completely

TF1d Stock brokers
Stock brokers
1 1 I do not trust at all
2 2
3 3

4 4
5 5 I trust completely

TF1e Investment advisers
Investment advisers
1 1 I do not trust at all
2 2
3 3
4 4
5 5 I trust completely

[End of table display]
IF (country born != empty and country born != United States of America) or (country mother born
!= empty and country mother born != United States of America) or (country father born != empty and
country father born != United States of America) THEN
|
| [The following questions are displayed as a table]
|
| **TF2a** The stock market
| The stock market
| 1 1 I do not trust at all
| 2 2
| 3 3
| 4 4
| 5 5 I trust completely
|
| **TF2b** Banks
| Banks
| 1 1 I do not trust at all
| 2 2
| 3 3
| 4 4
| 5 5 I trust completely
|
| **TF2c** Insurance companies
| Insurance companies
| 1 1 I do not trust at all
| 2 2
| 3 3
| 4 4
| 5 5 I trust completely
|
| **TF2d** Stock brokers
| Stock brokers
| 1 1 I do not trust at all
| 2 2
| 3 3
| 4 4
| 5 5 I trust completely
|
| **TF2e** Investment advisers
| Investment advisers
| 1 1 I do not trust at all
| 2 2

| 3 3
| 4 4
| 5 5 I trust completely
|
| [End of table display]
ENDIF

RA1 50-50 2 million or reduce by 1/3
Suppose that you unexpectedly inherited 1 million dollars. You have the chance to take a risky but possibly rewarding investment option that has a 50-50 chance of doubling the money to 2 million dollars in a month, and a 50-50 chance of reducing the money by one third, to 667 thousand dollars in a month. In other words, you could keep $1,000,000 or invest in a risky asset that has an equal chance of doubling your money to $2,000,000 or reducing it to $667,000. Would you choose to invest in the risky asset?
1 Yes
2 No

IF 50-50 2 million or reduce by Yes /3 = 1 THEN
|
| **RA1_A1** 50-50 double or half
| Now suppose the investment has a 50-50 chance of doubling the money to 2 million dollars in a month,
| and a 50-50 chance of cutting it in half, to 500 thousand dollars. In other words, you could keep
| $1,000,000 or invest in a risky asset that has an equal chance of doubling your money to $2,000,000
| or reducing it to $500,000. Would you choose to invest in the risky asset?
| 1 Yes
| 2 No
|
| IF 50-50 double or half = Yes THEN
| |
| | **RA1_A2** 50-50 double or reduce by 3/4
| | Now suppose the investment has a 50-50 chance of doubling the money to 2 million dollars in a
| | month, and a 50-50 chance of reducing it by three-quarters, to 250 thousand dollars in within a
| | month. In other words, you could keep $1,000,000 or invest in a risky asset that has an equal
| | chance of doubling your money to $2,000,000 or reducing it to $250,000. Would you choose to
| | invest in the risky asset?
| | 1 Yes
| | 2 No
| |
| ENDIF
|
ELSEIF 50-50 No million or reduce by 1/3 = 2 THEN
|
| **RA1_B1** 50-50 double or reduce by 1/5
| Now suppose the investment has a 50-50 chance of doubling the money in a month to 2 million dollars
| , and a 50-50 chance of reducing it by one-fifth, to 800 thousand dollars. In other words, you
| could keep $1,000,000 or invest in a risky asset that has an equal chance of doubling your money to
| $2,000,000 or reducing it to $800,000. Would you choose to invest in the risky asset?
| 1 Yes
| 2 No
|
| IF 50-50 double or reduce by 1/5 = No THEN
| |
| | **RA1_B2** 50-50 double or reduce by 1/10
| | Now suppose the investment has a 50-50 chance of doubling the money in a month to 2 million
| | dollars, and a 50-50 chance of reducing it by one-tenth, to 900 thousand dollars. In other words, you could

|| keep $1,000,000 or invest in a risky asset that has an equal chance of doubling your money to $2,000,000
|| or reducing it to $900,000. Would you choose to invest in the risky asset?
|| 1 Yes
|| 2 No
||
| ENDIF
|
ENDIF

TPA lottery A
Imagine you just won a lottery prize and have to choose now between one of two options for receiving
your payment. Which would you choose?
1 $1000 today
2 $1,250 a year from today

IF lottery A = 00 today THEN
|
| **TPA1** instead A 1
| What if instead the choice were between these two options, which would you choose?
| 1 $1000 today
| 2 $1,650 a year from today
|
ELSEIF lottery A = 2,250 a year from today THEN
|
| **TPA2** instead A 2
| What if instead the choice were between these two options, which would you choose?
| 1 $1000 today
| 2 $1,100 a year from today
|
ENDIF

TPB lottery B
Imagine you just won a lottery prize and have to choose now between one of two options for receiving
your payment. Which would you choose?
1 $1000 a year from today
2 $1,250 two years from today

IF lottery B = 00 a year from today THEN
|
| **TPB1** instead B 1
| What if instead the choice were between these two options, which would you choose?
| 1 $1000 a year from today
| 2 $1,650 two years from today
|
ELSEIF lottery B = 2,250 two years from today THEN
|
| **TPB2** instead B 2
| What if instead the choice were between these two options, which would you choose?
| 1 $1000 a year from today
| 2 $1,100 two years from today
|
ENDIF

expectations_intro expectations intro

Next, we would like to ask your opinion about how likely you think various events might be. When we ask a question we'd like for you to give us a number from 0 to 100, where "0" means that you think there is absolutely no chance, and "100" means that you think the event is absolutely sure to happen. For example, no one can ever be sure about tomorrow's weather, but if you think that rain is very unlikely tomorrow, you might say that there is a 10 percent chance of rain. If you think there is a very good chance that it will rain tomorrow, you might say that there is an 80 percent chance of rain.

I20 live in a different country than the United States in ten years
What is the percent chance that you would live in a different country than the United States in ten years?
String

IF I20_real > THEN
|
| [The following questions are displayed as a table]
|
| **I20a** what country
| What country would that be?
| 51 United States of America
| 1 Argentina
| 2 Brazil
| 3 Cambodia
| 4 Canada
| 5 China
| 6 Colombia
| 7 Cuba
| 8 Dominican Republic
| 9 Ecuador
| 10 Egypt
| 11 El Salvador
| 12 England
| 13 France
| 14 Germany
| 15 Greece
| 16 Guatemala
| 17 Guyana/British Guiana
| 18 Haiti
| 19 Honduras
| 20 Hong Kong
| 21 India
| 22 Iran
| 23 Ireland
| 24 Israel/Palestine
| 25 Italy
| 26 Jamaica
| 27 Japan
| 28 Korea
| 29 Laos
| 30 Lebanon
| 31 Mexico
| 32 Netherlands
| 33 Nicaragua
| 34 Nigeria

| 35 Russia
| 36 Pakistan
| 37 Panama
| 38 Peru
| 39 Philippines
| 40 Poland
| 41 Portugal
| 42 Puerto Rico
| 43 Romania
| 44 South Korea
| 45 Spain
| 46 Taiwan
| 47 Thailand
| 48 Trinidad and Tobago
| 49 Ukraine
| 50 United Kingdom
| 52 Venezuela
| 53 Vietnam
| 54 Other (please specify):
|
| **I20a_other** other
|
| String
|
| [End of table display]
ENDIF

I21 live in the United States for the rest of your life
What is the percent chance that you will live in the United States for the rest of your life?
String

IF CALCULATED AGE < 65 THEN
|
| **PE1** live to be 75 or more
| What is the percent chance that you will live to be 75 or more?
| String
|
| IF PE1_real < or PE1_real > 100 THEN
| |
| | **check0to100** check for < 0 or > 100
| | You have entered a value less than 0 or greater than 100. Your answers are important to us. Please
| | go back and change your answer.
| |
| ENDIF
|
| IF live to be 75 or more = ' 50 ' THEN
| |
| | **PE1_check50** check 50% response
| | You said you think the probability is 50%. Do you think that there is a 1 in 2 chance that this
| | will happen, or do you mean you are not sure how likely this event is?
| | 1 There is a 1 in 2 chance that this could happen.
| | 2 I am not sure how likely this event is to happen.
| |
| ENDIF

|
ENDIF

PE2 live to be FLPE2 or more
What is the percent chance that you will live to be [85/80/85/90/95/100/110] or more?
String

IF PE2_real < or PE2_real > 100 THEN
|
| **check0to100** check for < 0 or > 100
| You have entered a value less than 0 or greater than 100. Your answers are important to us. Please go
| back and change your answer.
|
ENDIF

IF live to be FLPE2 or more = ' 50 ' THEN
|
| **PE2_check50** check 50% response
| You said you think the probability is 50%. Do you think that there is a 1 in 2 chance that this will
| happen, or do you mean you are not sure how likely this event is?
| 1 There is a 1 in 2 chance that this could happen.
| 2 I am not sure how likely this event is to happen.
|
ENDIF

IF CALCULATED AGE < 65 THEN
|
| **PE4** working full-time after 65
| Now thinking about work in general. On this same scale from 0 to 100 where 0 equals Absolutely no
| chance and 100 equals Absolutely certain, what do you think the chances are that you will be working
| full-time after you reach age 65?
| String
|
| IF PE4_real < or PE4_real > 100 THEN
| |
| | **check0to100** check for < 0 or > 100
| | You have entered a value less than 0 or greater than 100. Your answers are important to us. Please
| | go back and change your answer.
| |
| ENDIF
|
| IF working full-time after 65 = ' 50 ' THEN
| |
| | **PE4_check50** check 50% response
| | You said you think the probability is 50%. Do you think that there is a 1 in 2 chance that this
| | will happen, or do you mean you are not sure how likely this event is?
| | 1 There is a 1 in 2 chance that this could happen.
| | 2 I am not sure how likely this event is to happen.
| |
| ENDIF
|
ENDIF

PE5 give significant financial help

What are the chances that you will give significant financial help totaling $5,000 or more to grown children, relatives or friends over the next ten years? By financial help we mean giving money, helping pay bills, or covering specific types of costs such as those for medical care or insurance, schooling, down payment for a home, rent, etc. The financial help can be considered support, a gift or a loan. Include college tuition payment but not shared housing or food.
String

IF PE5_real < or PE5_real > 100 THEN
|
| **check0to100** check for < 0 or > 100
| You have entered a value less than 0 or greater than 100. Your answers are important to us. Please go
| back and change your answer.
|
ENDIF

IF give significant financial help = ' 50 ' THEN
|
| **PE5_check50** check 50% response
| You said you think the probability is 50%. Do you think that there is a 1 in 2 chance that this will
| happen, or do you mean you are not sure how likely this event is?
| 1 There is a 1 in 2 chance that this could happen.
| 2 I am not sure how likely this event is to happen.
|
ENDIF

PE6 receive significant financial help
What are the chances that you will receive financial help totaling $5,000 or more from your children, relatives or friends over the next 10 years?
String

IF PE6_real < or PE6_real > 100 THEN
|
| **check0to100** check for < 0 or > 100
| You have entered a value less than 0 or greater than 100. Your answers are important to us. Please go
| back and change your answer.
|
ENDIF

IF receive significant financial help = ' 50 ' THEN
|
| **PE6_check50** check 50% response
| You said you think the probability is 50%. Do you think that there is a 1 in 2 chance that this will
| happen, or do you mean you are not sure how likely this event is?
| 1 There is a 1 in 2 chance that this could happen.
| 2 I am not sure how likely this event is to happen.
|
ENDIF

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