Well Being 62

IF SEX OF INDIVIDUAL-UPDATED = EMPTY THEN
|
| **Respondents1X060ASex** SEX OF INDIVIDUAL-UPDATED
| What is your sex?
| 1 (MALE) Male
| 2 (FEMALE) Female
|
ENDIF

IF FIRST NAME OF INDIVIDUAL = EMPTY THEN
|
| **Respondents1X058AFName** FIRST NAME OF INDIVIDUAL
| What is your first name?
| String
|
ENDIF

IF COUPLENESS STATUS OF INDIVIDUAL = EMPTY THEN
|
| **Respondents1X065ACouplenss** COUPLENESS STATUS OF INDIVIDUAL
| Are you married or living with a partner?
| 1 (MARRIED) Married
| 2 (REMARRIED) Remarried
| 3 (PARTNERED_VOL) Partnered
| 4 (REPARTNERED_VOL) Repartnered
| 5 (OTHER) Other
|
ENDIF

LOOP FROM 1 TO 40 DO
ENDDO

LOOP FROM 1 TO 10 DO
ENDDO

LOOP FROM 1 TO 20 DO
ENDDO

LOOP FROM 1 TO 10 DO
ENDDO
IF R CURRENT AGE CALCULATION >= 65 AND (COUPLENESS STATUS OF INDIVIDUAL =
(OTHER) Other OR
SP/P CURRENT AGE CALCULATION >= 65) THEN
|
| **Q010_RSPWRKPAYLCY** R OR SP WORK FOR PAY - LCY
| We are interested in how people are getting along financially these days. The next questions
| are about income you [] [] receive. Let's start with income from work. Did you [] [] do any
| work for pay last year, in [LAST CALENDAR YR CALCULATED]?
| 1 (YES) Yes
| 5 (NO) No
|

| IF R OR SP WORK FOR PAY - LCY = (YES) Yes THEN
||
|| IF COUPLENESS STATUS OF INDIVIDUAL = (OTHER) Other THEN
|||
|| ELSE
|||
||| **Q011_WhoWrkPayLCY** WHO WORKED FOR PAY - LCY
||| Which one of you worked for pay last year?
||| 1 (RESPONDENTONLY) Respondent only
||| 2 (SPOUSE_PARTNERONLY) Spouse/partner only
||| 3 (BTH) Both
|||
|| ENDIF
||
| ENDIF
|
ELSE
|
| IF R OR SP WORK FOR PAY - LCY <> (NO) No and R OR SP WORK FOR PAY - LCY <> Nonresponse
| THEN
||
|| **Q012_RWRKPAYLCY** R WORKED FOR PAY - LCY
|| We are interested in how people are getting along financially these days. The next questions
|| are about income you [] [] receive. Let's start with income from work. Did you do any work
|| for pay last year, in [LAST CALENDAR YR CALCULATED]?
|| 1 (YES) Yes
|| 5 (NO) No
||
|| IF COUPLENESS STATUS OF INDIVIDUAL <> (OTHER) Other THEN
|||
||| **Q013_SPWRKPAYLCY** SP WORKED FOR PAY - LCY
||| Did your [] do any work for pay last year, in [LAST CALENDAR YR CALCULATED]?
||| 1 (YES) Yes
||| 5 (NO) No
|||
|| ENDIF
||
| ENDIF
|
ENDIF

IF R OR SP WORK FOR PAY - LCY <> (NO) No and R OR SP WORK FOR PAY - LCY <> Nonresponse
THEN
|
| IF WHO WORKED FOR PAY - LCY = (RESPONDENTONLY) Respondent only or WHO WORKED FOR
PAY - LCY
| = (BTH) Both or R WORKED FOR PAY - LCY = (YES) Yes THEN
||
|| **Q014_RSEMPINCLCY** R INCOME FROM WORK SELF EMPL - LCY
|| [] []_2 Did any of your earnings from work in [LAST CALENDAR YR CALCULATED] come from
|| self-employment?
|| 1 (YES) Yes
|| 5 (NO) No

||
|| IF R INCOME FROM WORK SELF EMPL - LCY = (YES) Yes THEN
|||
||| **Q015_RAMTSEMPINCLCY** R AMOUNT FROM WORK SELF EMPL LCY
||| About how much did your self-employment income amount to in [LAST CALENDAR YR CALCULATED],
||| including any profits left in the business, before taxes and other deductions?
||| Range: 0..99999996
|||
||| IF R AMOUNT FROM WORK SELF EMPL LCY > 1000000 THEN
||||
|||| **checkQ15** check Q015_RAMTSEMPINCLCY
|||| You entered $[] Your answers are important to us. If this is incorrect, please go back
|||| and change your answer.
||||
||| ENDIF
|||
|| ENDIF
||
|| **Q019_RWAGESALLCY** R WAGES AND SALARY INCOME - LCY
|| [] any of your [LAST CALENDAR YR CALCULATED] earnings come from wages and salaries?
|| 1 (YES) Yes
|| 5 (NO) No
||
|| IF R WAGES AND SALARY INCOME - LCY = (YES) Yes THEN
|||
||| **Q020_RAMTWAGESALLCY** R AMOUNT FROM WAGES AND SALARY LCY
||| About how much wage and salary income did you receive in [LAST CALENDAR YR CALCULATED],
||| before taxes and other deductions?
||| Range: 0..99999996
|||
||| IF R AMOUNT FROM WAGES AND SALARY LCY > 1000000 THEN
||||
|||| **checkQ20** check Q020_RAMTWAGESALLCY
|||| You entered $[] Your answers are important to us. If this is incorrect, please go back
|||| and change your answer.
||||
||| ENDIF
|||
|| ENDIF
||
|| **Q024_RPRACTRADELCY** R INCOME FROM PROF PRAC OR TRADE - LCY
|| [] any of your [LAST CALENDAR YR CALCULATED] income come from a professional practice or
|| trade?
|| 1 (YES) Yes
|| 5 (NO) No
||
|| IF R INCOME FROM PROF PRAC OR TRADE - LCY = (YES) Yes THEN
|||
||| **Q025_RAMTPRACTRADELCY** R AMOUNT FROM PROF PRAC OR TRADE LCY
||| About how much did you receive from professional practice or trade in [LAST CALENDAR YR
||| CALCULATED], before taxes and other deductions?
||| Range: 0..99999996

| | |

| | | IF R AMOUNT FROM PROF PRAC OR TRADE LCY > 1000000 THEN

| | | |

| | | | **checkQ25** check Q025_RAMTPRACTRADELCY

| | | | You entered $[] Your answers are important to us. If this is incorrect, please go back

| | | | and change your answer.

| | | |

| | | ENDIF

| | |

| | ENDIF

| |

| | **Q029_RRCVTIPLCY** R INCOME FROM TIP BONUS COMMISSION - LCY

| | Other than what you have already told us about, did any of your [LAST CALENDAR YR

| | CALCULATED] income come from tips, bonuses, commissions, etc?

| | 1 (YES) Yes

| | 5 (NO) No

| |

| | IF R INCOME FROM TIP BONUS COMMISSION - LCY = (YES) Yes THEN

| | |

| | | **Q030_RAMTTIPLCY** R AMOUNT FROM TIP BONUS COMMISSION LCY

| | | About how much did your [LAST CALENDAR YR CALCULATED] income from tips, bonuses,

| | | commissions, etc. amount to, before taxes and other deductions?

| | | Range: 0..99999996

| | |

| | | IF R AMOUNT FROM TIP BONUS COMMISSION LCY > 1000000 THEN

| | | |

| | | | **checkQ30** check Q030_RAMTTIPLCY

| | | | You entered $[] Your answers are important to us. If this is incorrect, please go back

| | | | and change your answer.

| | | |

| | | ENDIF

| | |

| | ENDIF

| |

| | **Q034_ROTHINCLCY** R OTHER INCOME FROM WORK 2ND JOB - LCY

| | In [LAST CALENDAR YR CALCULATED], did you receive any other income from work, such as a

| | second job or the military reserves?

| | 1 (YES) Yes

| | 5 (NO) No

| |

| | IF R OTHER INCOME FROM WORK 2ND JOB - LCY = (YES) Yes THEN

| | |

| | | **Q035_RAMTOTHINCLCY** R AMOUNT FROM WORK 2ND JOB LCY

| | | How much did you receive from this work in [LAST CALENDAR YR CALCULATED], before taxes and

| | | other deductions?

| | | Range: 0..99999996

| | |

| | | IF R AMOUNT FROM WORK 2ND JOB LCY > 1000000 THEN

| | | |

| | | | **checkQ35** check Q035_RAMTOTHINCLCY

| | | | You entered $[] Your answers are important to us. If this is incorrect, please go back

| | | | and change your answer.

| | | |

| | | ENDIF
| | |
| | ENDIF
| |
| ENDIF
|
| IF WHO WORKED FOR PAY - LCY = (SPOUSE_PARTNERONLY) Spouse/partner only or WHO WORKED FOR PAY
| - LCY = (BTH) Both or SP WORKED FOR PAY - LCY = (YES) Yes THEN
| |
| | **Q039_SPSEMPINCLCY** SP INCOME FROM SELF EMPLOYMENT - LCY
| | [] Did any of your []'s income come from self-employment?
| | 1 (YES) Yes
| | 5 (NO) No
| |
| | IF SP INCOME FROM SELF EMPLOYMENT - LCY = (YES) Yes THEN
| | |
| | | **Q040_SPAMTSEMPINCLCY** SP AMOUNT FROM SELF EMPL INCOME LCY
| | | About how much did your []'s income from self-employment amount to [LAST CALENDAR YR
| | | CALCULATED], including any profits left in the business, before taxes and other deductions?
| | | Range: 0..99999996
| | |
| | | IF SP AMOUNT FROM SELF EMPL INCOME LCY > 1000000 THEN
| | | |
| | | | **checkQ40** check Q040_SPAMTSEMPINCLCY
| | | | You entered $[] Your answers are important to us. If this is incorrect, please go back
| | | | and change your answer.
| | | |
| | | ENDIF
| | |
| | ENDIF
| |
| | **Q044_SPWAGESALLCY** SP WAGES AND SALARY INCOME - LCY
| | Apart from any self-employment income did your [] have any income from wages and salaries
| | last year, in [LAST CALENDAR YR CALCULATED]?
| | 1 (YES) Yes
| | 5 (NO) No
| |
| | IF SP WAGES AND SALARY INCOME - LCY = (YES) Yes THEN
| | |
| | | **Q045_SPAMTWAGESALLCY** SP AMOUNT FROM WAGES AND SALARY LCY
| | | About how much did your []'s income from wages and salaries amount to in [LAST CALENDAR YR
| | | CALCULATED], before taxes and other deductions?
| | | Range: 0..99999996
| | |
| | | IF SP AMOUNT FROM WAGES AND SALARY LCY > 1000000 THEN
| | | |
| | | | **checkQ45** check Q045_SPAMTWAGESALLCY
| | | | You entered $[] Your answers are important to us. If this is incorrect, please go back
| | | | and change your answer.
| | | |
| | | ENDIF
| | |

|| ENDIF
||
|| **Q049_SPPRACTRADELCY** SP INCOME FROM PROF PRAC TRADE - LCY
|| [] any of your []'s income in [LAST CALENDAR YR CALCULATED] come from a professional
|| practice or trade?
|| 1 (YES) Yes
|| 5 (NO) No
||
|| IF SP INCOME FROM PROF PRAC TRADE - LCY = (YES) Yes THEN
|||
||| **Q050_SPAMTPRACTRADLCY** SP AMOUNT FROM PROF PRAC TRADE LCY
||| About how much income did your [] receive in [LAST CALENDAR YR CALCULATED] from a
||| professional practice or trade, before taxes and other deductions?
||| Range: 0..99999996
|||
||| IF SP AMOUNT FROM PROF PRAC TRADE LCY > 1000000 THEN
||||
|||| **checkQ50** check Q050_SPAMTPRACTRADLCY
|||| You entered $[] Your answers are important to us. If this is incorrect, please go back
|||| and change your answer.
||||
||| ENDIF
|||
|| ENDIF
||
|| **Q054_SPRCVTIPLCY** SP INCOME FROM TIP BONUS COMMISS - LCY
|| Other than what you have already told us about, did any of your []'s [LAST CALENDAR YR
|| CALCULATED] income come from tips, bonuses, commissions, etc?
|| 1 (YES) Yes
|| 5 (NO) No
||
|| IF SP INCOME FROM TIP BONUS COMMISS - LCY = (YES) Yes THEN
|||
||| **Q055_SPAMTTIPLCY** SP AMOUNT FR TIP BONUS COMMISS LCY
||| About how much did your [] receive from tips, bonuses, commissions, etc. in [LAST CALENDAR
||| YR CALCULATED], before taxes and other deductions?
||| Range: 0..99999996
|||
||| IF SP AMOUNT FR TIP BONUS COMMISS LCY > 1000000 THEN
||||
|||| **checkQ55** check Q055_SPAMTTIPLCY
|||| You entered $[] Your answers are important to us. If this is incorrect, please go back
|||| and change your answer.
||||
||| ENDIF
|||
|| ENDIF
||
|| IF COUPLENESS STATUS OF INDIVIDUAL = (MARRIED) Married or COUPLENESS STATUS OF
INDIVIDUAL
|| = (PARTNERED_VOL) Partnered THEN
|||
||| **Q059_SPOTHINC** SP OTHER INC FROM WORK 2ND JOB - LCY

| | | Did your [] receive any other income from work, such as a second job or the military
| | | reserves?
| | | 1 (YES) Yes
| | | 5 (NO) No
| | |
| | | IF SP OTHER INC FROM WORK 2ND JOB - LCY = (YES) Yes THEN
| | | |
| | | | **Q060_SPAMTOTHINCLCY** SP AMOUNT FROM WORK 2ND JOB LCY
| | | | How much did your [] receive from this work in [LAST CALENDAR YR CALCULATED], before
| | | | taxes and other deductions?
| | | | Range: 0..99999996
| | | |
| | | | IF SP AMOUNT FROM WORK 2ND JOB LCY > 25000 THEN
| | | | |
| | | | | **checkQ60** check Q060_SPAMTOTHINCLCY
| | | | | You entered $[] Your answers are important to us. If this is incorrect, please go back
| | | | | and change your answer.
| | | | |
| | | | ENDIF
| | | |
| | | ENDIF
| | |
| | ENDIF
| |
| ENDIF
|
| **Q064_RCVUNEMPLLCY** R OR SP INCOME FROM UNEMPLOYMENT - LCY
| Did you [] [] receive any income in [LAST CALENDAR YR CALCULATED] from Unemployment
| Compensation?
| 1 (YES) Yes
| 5 (NO) No
|
| IF R OR SP INCOME FROM UNEMPLOYMENT - LCY <> (NO) No and R OR SP INCOME FROM
UNEMPLOYMENT -
| LCY <> NONRESPONSE THEN
| |
| | IF COUPLENESS STATUS OF INDIVIDUAL <> (MARRIED) Married AND COUPLENESS STATUS OF
| | INDIVIDUAL <> (PARTNERED_VOL) Partnered THEN
| | |
| | ELSE
| | |
| | | **Q065_WHORCVUNEMPLCY** WHO RECEIVED INC FROM UNEMPLOYMENT LCY
| | | Who received that?
| | | 1 (RESPONDENTONLY) Respondent only
| | | 2 (SPOUSE_PARTNERONLY) Spouse/partner only
| | | 3 (BTH) Both
| | |
| | ENDIF
| |
| | IF WHO RECEIVED INC FROM UNEMPLOYMENT LCY <> (SPOUSE_PARTNERONLY)
Spouse/partner only THEN
| | |
| | | **Q066_RAMTUNEMPLCY** R AMOUNT FROM UNEMPLOYMENT - LCY

||| UNEMPLOYMENT COMPENSATION How much did you[] receive in [LAST CALENDAR YR CALCULATED],
||| (before taxes and other deductions)?
||| Range: 0..99999996
|||
||| IF R AMOUNT FROM UNEMPLOYMENT - LCY != empty and (R AMOUNT FROM UNEMPLOYMENT - LCY >
||| 50000 or R AMOUNT FROM UNEMPLOYMENT - LCY = 0) THEN
||||
|||| **checkQ66** check Q066_RAMTUNEMPLCY
|||| You entered $[] Your answers are important to us. If this is incorrect, please go back
|||| and change your answer.
||||
||| ENDIF
|||
|| ENDIF
||
|| IF (WHO RECEIVED INC FROM UNEMPLOYMENT LCY = (SPOUSE_PARTNERONLY) Spouse/partner only or
|| WHO RECEIVED INC FROM UNEMPLOYMENT LCY = (BTH) Both) and (COUPLENESS STATUS OF INDIVIDUAL
|| = (MARRIED) Married or COUPLENESS STATUS OF INDIVIDUAL = (PARTNERED_VOL) Partnered) THEN
|||
||| **Q070_SPAMTUNEMPLCY** SP AMOUNT FROM UNEMPLOYMENT - LCY
||| UNEMPLOYMENT COMPENSATION How much did your [] receive in [LAST CALENDAR YR CALCULATED],
||| (before taxes and other deductions)?
||| Range: 0..99999996
|||
||| IF SP AMOUNT FROM UNEMPLOYMENT - LCY != empty and (SP AMOUNT FROM UNEMPLOYMENT - LCY >
||| 50000 or SP AMOUNT FROM UNEMPLOYMENT - LCY = 0) THEN
||||
|||| **checkQ70** check Q070_SPAMTUNEMPLCY
|||| You entered $[] Your answers are important to us. If this is incorrect, please go back
|||| and change your answer.
||||
||| ENDIF
|||
|| ENDIF
||
| ENDIF
|
| IF R OR SP WORK FOR PAY - LCY = (((YES) Yes) Yes) Yes or R WORKED FOR PAY - LCY = yes
| or SP WORKED FOR PAY - LCY =yes THEN
||
|| **Q074_RCVWRKCOMLCY** R OR SP INCOME FROM WORKERS COMP - LCY
|| Did you [] [] receive any income in [LAST CALENDAR YR CALCULATED] from Workers' Compensation?
|| 1 (YES) Yes
|| 5 (NO) No
||

|| IF R OR SP INCOME FROM WORKERS COMP - LCY <> (NO) No and R OR SP INCOME FROM WORKERS COMP
|| - LCY <> NONRESPONSE THEN
|||
||| IF COUPLENESS STATUS OF INDIVIDUAL <> (MARRIED) Married and COUPLENESS STATUS OF
||| INDIVIDUAL <> (PARTNERED_VOL) Partnered THEN
||||
||| ELSE
||||
|||| **Q075_WHORCVWRKCOMLCY** WHO RECEIVED FROM WORKERS COMP LCY
|||| Who received that?
|||| 1 (RESPONDENTONLY) Respondent only
|||| 2 (SPOUSE_PARTNERONLY) Spouse/partner only
|||| 3 (BTH) Both
||||
||| ENDIF
|||
||| IF WHO RECEIVED FROM WORKERS COMP LCY <> (SPOUSE_PARTNERONLY) Spouse/partner only THEN
||||
|||| **Q076_RAMTWRKCOMLCY** R AMOUNT FROM WORKERS COMP LCY
|||| WORKERS COMPENSATION How much did you[] receive in [LAST CALENDAR YR CALCULATED],
|||| (before taxes and other deductions)?
|||| Range: 0..9999996
||||
|||| IF R AMOUNT FROM WORKERS COMP LCY != empty and (R AMOUNT FROM WORKERS COMP LCY >
|||| 50000 or R AMOUNT FROM WORKERS COMP LCY = 0) THEN
|||||
||||| **checkQ76** check Q076_RAMTWRKCOMLCY
||||| You entered $[] Your answers are important to us. If this is incorrect, please go back
||||| and change your answer.
|||||
|||| ENDIF
||||
||| ENDIF
|||
||| IF (WHO RECEIVED FROM WORKERS COMP LCY = (SPOUSE_PARTNERONLY) Spouse/partner only or WHO
||| RECEIVED FROM WORKERS COMP LCY = (BTH) Both) and (COUPLENESS STATUS OF INDIVIDUAL =
||| (MARRIED) Married or COUPLENESS STATUS OF INDIVIDUAL = (PARTNERED_VOL) Partnered)
THEN
||||
|||| **Q080_SPAMTWRKCOMLCY** SP AMOUNT FROM WORKERS COMP LCY
|||| WORKERS' COMPENSATION How much did your [] receive in [LAST CALENDAR YR CALCULATED],
|||| (before taxes and other deductions)?
|||| Range: 0..9999996
||||
|||| IF SP AMOUNT FROM WORKERS COMP LCY != empty and (SP AMOUNT FROM WORKERS COMP LCY >

|||| 50000 or SP AMOUNT FROM WORKERS COMP LCY = 0) THEN
|||||
||||| **checkQ80** check Q080_SPAMTWRKCOMLCY
||||| You entered $[] Your answers are important to us. If this is incorrect, please go back
||||| and change your answer.
|||||
|||| ENDIF
||||
||| ENDIF
|||
|| ENDIF
||
| ENDIF
|
ENDIF

SecJSOCIALSECURITYJ478_ CURRENTLY RECV SOC SEC INCOME
Do you currently receive any income from Social Security?
1 (YES) Yes
5 (NO) No

IF CURRENTLY RECV SOC SEC INCOME = (YES) Yes THEN
|
| **Q085_RAMTSSLSTMO** R AMOUNT OF SS INCOME - LAST MONTH
| About the Social Security income that you[] receive, how much was that Social Security check,
| or the amount deposited directly into an account, last month?
| Range: 0..9996
|
| IF R AMOUNT OF SS INCOME - LAST MONTH > 3000 THEN
||
|| **checkQ85** check Q085_RAMTSSLSTMO
|| You entered $[] Your answers are important to us. If this is incorrect, please go back and
|| change your answer.
||
| ENDIF
|
| IF PREV WAVE R RECIEVES SS <> (YES) Yes THEN
||
|| **Q089_RSSBENSTARTYR** R YEAR STARTED TO RECEIVE SS BENEFITS
|| In what year did you start to receive Social Security benefits?
|| Range: 1900..2009
||
|| IF R YEAR STARTED TO RECEIVE SS BENEFITS > current date year THEN
|||
||| **checkEnteredYearGreater** YEAR ENTERED IS GREATER THAN CURRENT YEAR
||| The year you entered is greater than today. Please go back and correct your answer.
|||
|| ENDIF
||
|| IF R YEAR STARTED TO RECEIVE SS BENEFITS > TWO YEARS AGO or R YEAR STARTED TO RECEIVE SS
|| BENEFITS = TWO YEARS AGO THEN
|||

| | | **Q090_RSSBENSTARTMO** R MONTH STARTED TO RECEIVE SS BENEFITS
| | | What month was that?
| | | 1 (JAN) January
| | | 2 (FEB) February
| | | 3 (MAR) March
| | | 4 (APR) April
| | | 5 (MAY) May
| | | 6 (JUN) June
| | | 7 (JUL) July
| | | 8 (AUG) August
| | | 9 (SEP) September
| | | 10 (OCT) October
| | | 11 (NOV) November
| | | 12 (DEC) December
| | |
| | ENDIF
| |
| ENDIF
|
ENDIF

IF COUPLENESS STATUS OF INDIVIDUAL = (MARRIED) Married or COUPLENESS STATUS OF
INDIVIDUAL =
(PARTNERED_VOL) Partnered THEN
|
| **Q084_SPSSINC** SP SOCIAL SECURITY INCOME
| You said earlier that you are [] currently receiving Social Security income. Is your []
| currently receiving any Social Security income?
| 1 (YES) Yes
| 5 (NO) No
|
| IF SP SOCIAL SECURITY INCOME = (YES) Yes THEN
| |
| | **Q091_SPAMTSSLSTMO** SP AMOUNT OF SS INCOME - LAST MONTH
| | Now we'd like to ask about your []'s Social Security income. How much was that Social
| | Security check, or the amount deposited directly into an account, last month?
| | Range: 0..9996
| |
| | IF SP AMOUNT OF SS INCOME - LAST MONTH != empty and (SP AMOUNT OF SS INCOME - LAST
MONTH
| | > 3000 or SP AMOUNT OF SS INCOME - LAST MONTH = 0) THEN
| | |
| | | **checkQ91** check Q091_SPAMTSSLSTMO
| | | You entered $[] Your answers are important to us. If this is incorrect, please go back and
| | | change your answer.
| | |
| | ENDIF
| |
| | IF PREV WAVE S/P RECIEVES SS <> (YES) Yes THEN
| | |
| | | **Q095_SPSSBENSTARTYR** SP YEAR STARTED TO RECEIVE SS BENEFITS
| | | In what year did your [] start to receive Social Security benefits?
| | | Range: 1900..2009

|||
||| IF SP YEAR STARTED TO RECEIVE SS BENEFITS > current date year THEN
||||
|||| **checkEnteredYearGreater** YEAR ENTERED IS GREATER THAN CURRENT YEAR
|||| The year you entered is greater than today. Please go back and correct your answer.
||||
||| ENDIF
|||
||| IF SP YEAR STARTED TO RECEIVE SS BENEFITS > TWO YEARS AGO or SP YEAR STARTED TO RECEIVE
||| SS BENEFITS = TWO YEARS AGO THEN
||||
|||| **Q096_SPSSBENSTARTMO** SP MONTH STARTED TO RECEIVE SS BENEFITS
|||| What month was that?
|||| 1 (JAN) January
|||| 2 (FEB) February
|||| 3 (MAR) March
|||| 4 (APR) April
|||| 5 (MAY) May
|||| 6 (JUN) June
|||| 7 (JUL) July
|||| 8 (AUG) August
|||| 9 (SEP) September
|||| 10 (OCT) October
|||| 11 (NOV) November
|||| 12 (DEC) December
||||
||| ENDIF
|||
|| ENDIF
||
| ENDIF
|
ENDIF

Q105_RCVSSILSTMO R OR SP INCOME FROM SSI - LAST MONTH
Did you [] [] receive any income last month from Supplemental Security Income, also called SSI?
(SSI is a program administered by the Social Security Administration which makes assistance
payments to low-income, blind, disabled, and aged persons. A person may be receiving either or
both SSI and Social Security checks.)
1 (YES) Yes
5 (NO) No

IF R OR SP INCOME FROM SSI - LAST MONTH <> (NO) No and R OR SP INCOME FROM SSI - LAST MONTH
<> NONRESPONSE THEN
|
| IF (COUPLENESS STATUS OF INDIVIDUAL <> (MARRIED) Married and COUPLENESS STATUS OF
| INDIVIDUAL <> (PARTNERED_VOL) Partnered) THEN
||
| ELSE
||
|| **Q106_WHORCSSIMSTMO** WHO RECEIVED INC FROM SSI LAST MONTH

|| Which one of you received income from SSI?
|| 1 (RESPONDENTONLY) Respondent only
|| 2 (SPOUSE_PARTNERONLY) Spouse/partner only
|| 3 (BTH) Both
||
| ENDIF
|
| IF R OR SP INCOME FROM SSI - LAST MONTH <> (NO) No and R OR SP INCOME FROM SSI - LAST MONTH
| <> NONRESPONSE THEN
||
|| **Q107_AMTSSILSTMO** AMOUNT RECEIVED FROM SSI LAST MONTH
|| How much [] receive from SSI last month?
|| Range: 0..9996
||
|| IF AMOUNT RECEIVED FROM SSI LAST MONTH != empty and (AMOUNT RECEIVED FROM SSI LAST MONTH
|| > 1500 or AMOUNT RECEIVED FROM SSI LAST MONTH = 0) THEN
|||
||| **checkQ107** check Q107_AMTSSILSTMO
||| You entered $[] Your answers are important to us. If this is incorrect, please go back and
||| change your answer.
|||
|| ENDIF
||
|| IF PREV WAVE R RECIEVES SSI <> (YES) Yes THEN
|||
||| **Q111_YRSTARTRCVSSI** YEAR STARTED TO RECEIVE SSI INCOME
||| In what year [] start to receive SSI?
||| Range: 1900..2009
|||
||| IF YEAR STARTED TO RECEIVE SSI INCOME > current date year THEN
||||
|||| **checkEnteredYearGreater** YEAR ENTERED IS GREATER THAN CURRENT YEAR
|||| The year you entered is greater than today. Please go back and correct your answer.
||||
||| ENDIF
|||
||| IF YEAR STARTED TO RECEIVE SSI INCOME > TWO YEARS AGO or YEAR STARTED TO RECEIVE SSI
||| INCOME = TWO YEARS AGO THEN
||||
|||| **Q112_MOSTARTRCVSSI** MONTH STARTED TO RECEIVE SSI INCOME
|||| What month was that?
|||| 1 (JAN) January
|||| 2 (FEB) February
|||| 3 (MAR) March
|||| 4 (APR) April
|||| 5 (MAY) May
|||| 6 (JUN) June
|||| 7 (JUL) July
|||| 8 (AUG) August
|||| 9 (SEP) September

|||| 10 (OCT) October
|||| 11 (NOV) November
|||| 12 (DEC) December
||||
||| ENDIF
|||
|| ENDIF
||
| ENDIF
|
ENDIF

Q113_RCVWELFLCY R OR SP INCOME FR WELFARE NOT SSI - LCY
Did you [] [] receive any income from welfare in [LAST CALENDAR YR CALCULATED], not including SSI? Do not include food stamps or other non-cash welfare programs.
1 (YES) Yes
5 (NO) No

IF R OR SP INCOME FR WELFARE NOT SSI - LCY <> (NO) No and R OR SP INCOME FR WELFARE NOT SSI -
LCY <> NONRESPONSE THEN
|
| IF (COUPLENESS STATUS OF INDIVIDUAL <> (MARRIED) Married and COUPLENESS STATUS OF
| INDIVIDUAL <> (PARTNERED_VOL) Partnered) THEN
||
| ELSE
||
|| **Q114_WHORCVWELFLCY** WHO RECEIVED INC FR WELFARE NOT SSI LCY
|| Who received that?
|| 1 (RESPONDENTONLY) Respondent only
|| 2 (SPOUSE_PARTNERONLY) Spouse/partner only
|| 3 (BTH) Both
||
| ENDIF
|
| **Q115_AMTWELFRCVLCY** AMOUNT FROM WELFARE LCY
| How much [] receive in [LAST CALENDAR YR CALCULATED]?
| Range: 0..999996
|
| IF AMOUNT FROM WELFARE LCY != empty and (AMOUNT FROM WELFARE LCY > 50000 or AMOUNT FROM
| WELFARE LCY = 0) THEN
||
|| **checkQ115** check Q115_AMTWELFRCVLCY
|| You entered $[] Your answers are important to us. If this is incorrect, please go back and
|| change your answer.
||
| ENDIF
|
ENDIF

Q119_RCVVETBENNOW R OR SP INC FR VETERAN BEN MILITARY PENS
Are you [] [] currently receiving any income from veteran benefits or a military pension?

1 (YES) Yes
5 (NO) No

IF R OR SP INC FR VETERAN BEN MILITARY PENS = (YES) Yes THEN
|
| IF (COUPLENESS STATUS OF INDIVIDUAL <> (MARRIED) Married and COUPLENESS STATUS OF
| INDIVIDUAL <> (PARTNERED_VOL) Partnered) THEN
||
| ELSE
||
|| **Q120_WHORCVVETBENNOW** WHO RECEIVES VET BEN MILITARY PENSION
|| Who receives that?
|| 1 (RESPONDENTONLY) Respondent only
|| 2 (SPOUSE_PARTNERONLY) Spouse/partner only
|| 3 (BTH) Both
||
| ENDIF
|
| IF WHO RECEIVES VET BEN MILITARY PENSION <> (SPOUSE_PARTNERONLY) Spouse/partner
only and WHO
| RECEIVES VET BEN MILITARY PENSION <> NONRESPONSE THEN
||
|| **Q121_RAMTVETBENLSTMO** R AMT FR VETERAN BENEFITS - LAST MONTH
|| How much did you[] receive last month from that (before taxes and other deductions)?
|| Range: 0..9996
||
|| IF R AMT FR VETERAN BENEFITS - LAST MONTH >= 1 and R AMT FR VETERAN BENEFITS -
LAST MONTH
|| <= 99 or R AMT FR VETERAN BENEFITS - LAST MONTH > 3000 THEN
|||
||| **checkQ121** check Q121_RAMTVETBENLSTMO
||| You entered $[] Your answers are important to us. If this is incorrect, please go back and
||| change your answer.
|||
|| ENDIF
||
|| **Q125_YRRSTRCVVETBEN** R YEAR STARTED VETERAN BENEFITS
|| In what year did you start to receive these benefits?
|| Range: 1900..2009
||
|| IF R YEAR STARTED VETERAN BENEFITS > current date year THEN
|||
||| **checkEnteredYearGreater** YEAR ENTERED IS GREATER THAN CURRENT YEAR
||| The year you entered is greater than today. Please go back and correct your answer.
|||
|| ENDIF
||
|| IF R YEAR STARTED VETERAN BENEFITS > TWO YEARS AGO or R YEAR STARTED VETERAN
BENEFITS =
|| TWO YEARS AGO THEN
|||
||| **Q126_MORSTRCVVETBEN** R MONTH STARTED VETERAN BENEFITS
||| What month was that?

||| 1 (JAN) January
||| 2 (FEB) February
||| 3 (MAR) March
||| 4 (APR) April
||| 5 (MAY) May
||| 6 (JUN) June
||| 7 (JUL) July
||| 8 (AUG) August
||| 9 (SEP) September
||| 10 (OCT) October
||| 11 (NOV) November
||| 12 (DEC) December
|||
|| ENDIF
||
| ENDIF
|
| IF (COUPLENESS STATUS OF INDIVIDUAL = (MARRIED) Married or COUPLENESS STATUS OF INDIVIDUAL
| = (PARTNERED_VOL) Partnered)and (WHO RECEIVES VET BEN MILITARY PENSION <> (RESPONDENTONLY)
| Respondent only and WHO RECEIVES VET BEN MILITARY PENSION <> NONRESPONSE) THEN
||
|| **Q127_SPAMTVETBENLSTMO** SP AMT FR VETERAN BENEFITS - LAST MONTH
|| How much did your [] receive last month from that (before taxes and other deductions)?
|| Range: 0..9996
||
|| IF SP AMT FR VETERAN BENEFITS - LAST MONTH >= 1 and SP AMT FR VETERAN BENEFITS - LAST
|| MONTH <= 99 or SP AMT FR VETERAN BENEFITS - LAST MONTH > 3000 THEN
|||
||| **checkQ127** check Q127_SPAMTVETBENLSTMO
||| You entered $[] Your answers are important to us. If this is incorrect, please go back and
||| change your answer.
|||
|| ENDIF
||
|| **Q131_YRSPSTRCVVETBEN** SP YEAR STARTED VETERAN BENEFITS
|| In what year did [] start to receive these benefits?
|| Range: 1900..2009
||
|| IF SP YEAR STARTED VETERAN BENEFITS > current date year THEN
|||
||| **checkEnteredYearGreater** YEAR ENTERED IS GREATER THAN CURRENT YEAR
||| The year you entered is greater than today. Please go back and correct your answer.
|||
|| ENDIF
||
|| IF SP YEAR STARTED VETERAN BENEFITS > TWO YEARS AGO or SP YEAR STARTED VETERAN BENEFITS =
|| TWO YEARS AGO THEN
|||
||| **Q132_MOSPSTRCVVETBEN** SP MONTH STARTED VETERAN BENEFITS {SE update 2/13/08}

||| What month was that?
||| 1 (JAN) January
||| 2 (FEB) February
||| 3 (MAR) March
||| 4 (APR) April
||| 5 (MAY) May
||| 6 (JUN) June
||| 7 (JUL) July
||| 8 (AUG) August
||| 9 (SEP) September
||| 10 (OCT) October
||| 11 (NOV) November
||| 12 (DEC) December
|||
|| ENDIF
||
| ENDIF
|
ENDIF

SecHOtherAssetsH151_Own2ndHome OWN SECOND HOME
Not including investment property, do you [] [] own a second home or condo or own timeshares in one?
1 (YES) Yes
5 (NO) No

IF OWN SECOND HOME = (YES) Yes THEN
|
| **SecHOtherAssetsH166_HomeValue2nd** Dollar value second home
| About what would it bring if it (or your part of it) were sold today?
| Range: 0..99999996
|
ENDIF

SecHMainresidenceH014_OwnMobile Own mobile home/site
Do you [] [] own a mobile home or own a mobile home and site?
1 (YES) Yes
5 (NO) No

IF Own mobile home/site = (YES) Yes THEN
|
| **SecHMainresidenceH016_MobileValue** MOBILE HOME PRESENT VALUE
| What is its present value, or what would you get if it were sold today?
| Range: 0..99999996
|
ENDIF

SecHMainresidenceH004_OwnRent Own home
Do you [] [] own your home?
1 (YES) Yes
5 (NO) No

IF Own home = (YES) Yes THEN

|
| **SecHMainresidenceH020_HomeValue1st** HOME PRESENT VALUE
| What is its present value, or what would you get if it were sold today?
| Range: 0..99999996
|
ENDIF

IF REAL ESTATE ASSET <> (NO) No and REAL ESTATE ASSET <> NONRESPONSE THEN
|
| **Q134_RealEstate** REAL ESTATE ASSET AMT
| If you sold all that and then paid off any debts on it, about how much would you get?
| Range: -1000000..99999996
|
| IF REAL ESTATE ASSET AMT < 0 or (REAL ESTATE ASSET AMT > 0 and REAL ESTATE ASSET AMT <
| 5000) or REAL ESTATE ASSET AMT > 250000 THEN
||
|| **CheckQ134** check Q134_RealEstate
|| You entered $[] Your answers are important to us. If this is incorrect, please go back and
|| change your answer.
||
| ENDIF
|
| **Q138_** RENTAL INCOME FROM THIS PROPERTY
| Do you [] [] currently receive any income or rent from []?
| 1 (YES) Yes
| 5 (NO) No
|
| IF RENTAL INCOME FROM THIS PROPERTY <> (NO) No and RENTAL INCOME FROM THIS PROPERTY <>
| NONRESPONSE THEN
||
|| **Q139_** RENTAL INCOME RECEIVE HOW OFTEN
|| How often do you receive that?
|| 1 (WEEK) Week
|| 2 (_2XMONTH) 2 X month
|| 3 (MONTH) Month
|| 4 (QUARTER) Quarter
|| 5 (_6MONTHS) 6 Months
|| 6 (YEAR) Year
|| 7 (OTHER_SPECIFY) Other (specify)
||
|| IF RENTAL INCOME RECEIVE HOW OFTEN = (OTHER_SPECIFY) Other (specify) THEN
|||
||| **Q140S** HOW OFTEN REC RENTAL INCOME - SPECIFY
||| (How often do you receive that?) Other (Specify):
||| Memo
|||
|| ENDIF
||
|| IF RENTAL INCOME RECEIVE HOW OFTEN = (WEEK) Week or RENTAL INCOME RECEIVE HOW OFTEN =
|| (_2XMONTH) 2 X (MONTH) Month or RENTAL INCOME RECEIVE HOW OFTEN = MONTH or

RENTAL INCOME
|| RECEIVE HOW OFTEN = (QUARTER) Quarter or RENTAL INCOME RECEIVE HOW OFTEN = (_6MONTHS) 6
|| Months THEN
|||
||| **Q141_** RENTAL INCOME AMOUNT LAST PERIOD
||| Before any expenses or deductions, about how much did you receive last [] from that?
||| Range: 0..9999996
|||
||| IF RENTAL INCOME AMOUNT LAST PERIOD > 50000 THEN
||||
|||| **checkQ141** check Q141_
|||| You entered $[] Your answers are important to us. If this is incorrect, please go back
|||| and change your answer.
||||
||| ENDIF
|||
||| IF RENTAL INCOME AMOUNT LAST PERIOD <> NONRESPONSE THEN
||||
|||| **Q142_** RENTAL INC SAME AMOUNT PER PERIOD
|||| Do you get about the same amount each []?
|||| 1 (YES) Yes
|||| 5 (NO) No
||||
||| ENDIF
|||
|| ENDIF
||
|| IF RENTAL INC SAME AMOUNT PER PERIOD <> (YES) Yes THEN
|||
||| **Q143_** RENTAL INCOME AMOUNT - LCY
||| Before any expenses or deductions, about how much did you receive from this rental income
||| in [LAST CALENDAR YR CALCULATED]? Do not include rental income from a business or farm
||| that you own.
||| Range: 0..9999996
|||
||| IF (RENTAL INCOME AMOUNT - LCY > 0 and RENTAL INCOME AMOUNT - LCY < 1000) or RENTAL
||| INCOME AMOUNT - LCY > 50000 THEN
||||
|||| **checkQ143** check Q143_
|||| You entered $[] Your answers are important to us. If this is incorrect, please go back
|||| and change your answer.
||||
||| ENDIF
|||
|| ENDIF
||
| ENDIF
|
ENDIF

IF BUSINESS OR FARM ASSETS <> (NO) No and BUSINESS OR FARM ASSETS <> NONRESPONSE

THEN
|
| **Q148_AmtBusFarm** BUSINESS OR FARM EQUITY AMOUNT
| If you sold all that and then paid off any debts on it, about how much would you get?
| Range: -1000000..99999996
|
| IF BUSINESS OR FARM EQUITY AMOUNT < 0 or (BUSINESS OR FARM EQUITY AMOUNT > 0 and BUSINESS
| OR FARM EQUITY AMOUNT < 5000) or BUSINESS OR FARM EQUITY AMOUNT > 500000 THEN
||
|| **checkQ148_AmtBusFarm** check Q148_AmtBusFarm
|| You entered $[] Your answers are important to us. If this is incorrect, please go back and
|| change your answer.
||
| ENDIF
|
| **Q492_** BUSINESS/FARM AMT PREV REPORT
| Did you include the value of this asset earlier in the survey?
| 1 (YES) Yes
| 5 (NO) No
|
| IF BUSINESS/FARM AMT PREV REPORT = (YES) Yes THEN
||
|| **Q523_** BUSINESS/FARM PERCENT REPORTED
|| What percent have you already entered?
|| Range: 1..100
||
| ENDIF
|
| **Q152_** BUSINESS OR FARM INCOME
| Do you [] [] currently receive any income from []?
| 1 (YES) Yes
| 5 (NO) No
|
| IF BUSINESS OR FARM INCOME <> (NO) No and BUSINESS OR FARM INCOME <> NONRESPONSE
THEN
||
|| **Q153_** BUSINESS OR FARM INC RECEIVE HOW OFTEN
|| How often do you receive that?
|| 1 (WEEK) Week
|| 2 (_2XMONTH) 2 X month
|| 3 (MONTH) Month
|| 4 (QUARTER) Quarter
|| 5 (_6MONTHS) 6 Months
|| 6 (YEAR) Year
|| 7 (OTHER_SPECIFY) Other (specify)
||
|| IF BUSINESS OR FARM INC RECEIVE HOW OFTEN = (OTHER_SPECIFY) Other (specify) THEN
|||
||| **Q154S** HOW OFTEN REC BUSINESS/FARM INC-SPECIFY
||| (How often do you receive that?) Other (Specify):
||| Memo
|||

|| ENDIF
||
|| IF BUSINESS OR FARM INC RECEIVE HOW OFTEN <> (YEAR) Year AND BUSINESS OR FARM INC RECEIVE
|| HOW OFTEN <> (OTHER_SPECIFY) Other (specify) AND BUSINESS OR FARM INC RECEIVE HOW OFTEN
|| <> NONRESPONSE THEN
|||
||| **Q155_** BUSINESS OR FARM INC AMT LAST PERIOD
||| About how much did you receive last [] from that, (before taxes and other deductions)?
||| Range: 0..9999996
|||
||| IF BUSINESS OR FARM INC AMT LAST PERIOD > 100000 THEN
||||
|||| **checkQ155** check Q155_
|||| You entered $[] Your answers are important to us. If this is incorrect, please go back
|||| and change your answer.
||||
||| ENDIF
|||
||| IF BUSINESS OR FARM INC AMT LAST PERIOD <> NONRESPONSE THEN
||||
|||| **Q156_** BUSINESS OR FARM INC SAME AMT PER PERIOD
|||| Do you get about the same amount each []?
|||| 1 (YES) Yes
|||| 5 (NO) No
||||
||| ENDIF
|||
|| ENDIF
||
|| IF BUSINESS OR FARM INC SAME AMT PER PERIOD <> (YES) Yes THEN
|||
||| **Q157_** BUSINESS OR FARM INC - LCY
||| About how much did you [] [] receive from any farms or businesses in [LAST CALENDAR YR
||| CALCULATED], (before taxes and other deductions)?
||| Range: 0..9999996
|||
||| IF (BUSINESS OR FARM INC - LCY > 0 and BUSINESS OR FARM INC - LCY < 2500) or BUSINESS
||| OR FARM INC - LCY > 100000 THEN
||||
|||| **checkQ157** check Q157_
|||| You entered $[] Your answers are important to us. If this is incorrect, please go back
|||| and change your answer.
||||
||| ENDIF
|||
|| ENDIF
||
|| **Q161_** BUSINESS INC REPORTED EARLIER IN IW
|| Did you include this income earlier in the survey?
|| 1 (YES) Yes
|| 5 (NO) No

||
| ENDIF
|
ENDIF

Q162_ IRA OR KEOGH
Do you [] [] currently have any money or assets that are held in an Individual Retirement
Account, that is, in an IRA or KEOGH account? Choose option 2 if you not have active IRA or
KEOGH accounts, but used to have, and the assets have been withdrawn or annuitized.
1 (YES) Yes
2 (VOLPREVHADACCNOTNOW) Previously had accounts, not now
5 (NO) No

IF IRA OR KEOGH = (YES) Yes THEN
|
| **Q163_** NUMBERS OF IRA OR KEOGH
| How many IRA or KEOGH accounts do you [] [] have?"
| 1 (ONE) One
| 2 (TWO) Two
| 3 (THREE) Three
| 4 (MORETHAN3) More than 3
|
| LOOP FROM 1 TO 3 DO
||
|| IF I < NUMBERS OF IRA OR KEOGH or I = NUMBERS OF IRA OR KEOGH THEN
|||
||| IF COUPLENESS STATUS OF INDIVIDUAL <> (MARRIED) Married and COUPLENESS STATUS OF
||| INDIVIDUAL <> (PARTNERED_VOL) Partnered THEN
||||
|||ELSE
||||
||||**Q165_** WHO HAS IRA ACCOUNTS
||||Let's think about [] []2 yours []?
||||1 (RSACCOUNT) R's account
||||2 (SPSORPTRSACCOUNT) Spouse's or partner's account
||||
|||ENDIF
|||
|||**Q166_AmtIRA** AMOUNT IN IRA ACCOUNT
|||[] About how much []_2 at the present time?
|||Range: 0..99999996
|||
|||IF (AMOUNT IN IRA ACCOUNT > 0 and AMOUNT IN IRA ACCOUNT < 5000) or AMOUNT IN IRA
|||ACCOUNT > 250000 THEN
||||
||||**checkQ166_AmtIRA** check Q166_AmtIRA
||||You entered $[] Your answers are important to us. If this is incorrect, please go back
||||and change your answer.
||||
|||ENDIF
|||
|||**Q513_ANYSTMUTFUND** IF IRA/KEO INVESTED STOCKS/MUT FUNDS {SE update 2/13/08}
|||Is any of that (IRA/KEOGH) invested in stocks or mutual funds?

||| 1 (YES) Yes
||| 5 (NO) No
|||
||| IF IF IRA/KEO INVESTED STOCKS/MUT FUNDS {SE update 2/13/08} = (YES) Yes THEN
||||
|||| **Q514_PerseStMutFund** PERCENT IN STOCK OR MUTUAL FUND
|||| About what percent is invested in stocks or mutual funds?
|||| Range: 0..100
||||
|||| IF PERCENT IN STOCK OR MUTUAL FUND = nonresponse THEN
|||||
||||| **Q515_PersStMutFundDKRF** PERCENT IN STOCK OR MUTUAL FUND
||||| Is it less than 50 percent, more than 50 percent, or what?
||||| 1 (LESSTHAN50PERCENT) Less than 50 percent
||||| 3 (ABT50PERCENT) About 50 percent
||||| 5 (MORETHAN50PERCENT) More than 50 percent
|||||
|||| ENDIF
||||
||| ENDIF
|||
||| **Q170_** WITHDRAWN ANY MONEY FROM IRA
||| Have you [] [] withdrawn any money or received any payments from [] [][]?
||| 1 (YES) Yes
||| 5 (NO) No
|||
||| IF WITHDRAWN ANY MONEY FROM IRA <> (NO) No and WITHDRAWN ANY MONEY FROM IRA <>
||| NONRESPONSE THEN
||||
|||| **Q171_AmtIRADraw** AMOUNT WITHDRAWN FROM IRA ACCOUNT
|||| Altogether, about how much money did you [] [] withdraw from [] [], (before taxes and
|||| other deductions)?
|||| Range: 0..9999996
||||
|||| IF AMOUNT WITHDRAWN FROM IRA ACCOUNT > 1000000 THEN
|||||
||||| **checkQ171_AmtIRADraw** check Q171_AmtIRADraw
||||| You entered $[] Your answers are important to us. If this is incorrect, please go back
||||| and change your answer.
|||||
|||| ENDIF
||||
|||| IF AMOUNT WITHDRAWN FROM IRA ACCOUNT <> 0 and AMOUNT WITHDRAWN FROM IRA ACCOUNT <>
|||| empty THEN
|||||
||||| **Q175_** AMT WITHDR FR IRA ACCOUNTS-PER
||||| Altogether, about how much money did you [] [] withdraw from [] [], (before taxes and
||||| other deductions)?
||||| 1 (INTOTAL) In total
||||| 3 (MONTH) Month
||||| 4 (QUARTER) Quarter

|||||5 (_6MONTHS) 6 Month
|||||6 (YEAR) Year
|||||7 (OTHER_SPECIFY) Other (specify)
|||||
|||||IF AMT WITHDR FR IRA ACCOUNTS-PER = (OTHER_SPECIFY) Other (specify) THEN
||||||
||||||**Q176S** AMT WITHDR FR IRA ACCOUNT - SPECIFY
||||||(Altogether, about how much money did you [] [] withdraw from [] [], (before taxes
||||||and other deductions)?) Other (Specify):
||||||Memo
||||||
|||||ENDIF
|||||
||||ENDIF
||||
||||**Q177_** IRA MONEY MINIMUM WITHDRAWAL
||||Did you [] [] take out only the 'minimum withdrawal option', that is, the amount
||||required to avoid a tax penalty?
||||1 (YES) Yes
||||5 (NO) No
||||
||||**Q178M** IRA DO WITH WITHDRAW
||||What did you do with the funds you withdrew from []? Were they put into savings, used
||||for regular expenses, used for special purchases, given to relatives, or what? Choose
||||all that apply
||||1 (PUTINSAVINGS) Put in savings
||||2 (USEDFORREGULAREXPENSES) Used for regular expenses
||||3 (USEDFORSPECIALPURCHASES) Used for special purchases
||||4 (GIVENTORELATIVES) Given to relatives
||||7 (OTHER_SPECIFY) Other (specify)
||||
||||IF OTHER_SPECIFY in IRA DO WITH WITHDRAW THEN
|||||
|||||**Q179S** IRA DO WITH WITHDRAW - SPECIFY
|||||(What did you do with the funds you withdrew from []? Were they put into savings, used
|||||for regular expenses, used for special purchases, given to relatives, or what?) Other
|||||(Specify):
|||||Memo
|||||
||||ENDIF
||||
|||ENDIF
|||
||ENDIF
||
|ENDDO
|
ENDIF

Q182_ OTHER IRA ANNUITIES
Did you [] [] cash in or convert any other IRA or KEOGH accounts to annuities at any time [][]?
1 (YES) Yes
5 (NO) No

IF OTHER IRA ANNUITIES = (YES) Yes THEN
|
| IF (COUPLENESS STATUS OF INDIVIDUAL <> (MARRIED) Married and COUPLENESS STATUS OF
| INDIVIDUAL <> (PARTNERED_VOL) Partnered) THEN
||
| ELSE
||
|| **Q183_** WHO HAS OTHER IRA ANNUITIES
|| Was that your IRA or KEOGH, or your []'s?
|| 1 (RESPONDENTONLY) Respondent only
|| 2 (SPOUSE_PARTNERONLY) Spouse/partner only
|| 3 (BTH) Both
||
| ENDIF
|
| **Q184M** HOW IRA ANNUITIZED
| Did you [] [] cash in these accounts, convert them to annuities, or what? Choose all that apply
| 1 (CASHEDINACCOUNT) Cashed in account
| 2 (CONVERTEDTOANNUITY) Converted to annuity
| 7 (OTHER_SPECIFY) Other (specify)
|
| IF OTHER_SPECIFY IN HOW IRA ANNUITIZED THEN
||
|| **Q185S** HOW IRA ANNUITIZED - SPECIFY
|| (Did you [] [] cash in these accounts, convert them to annuities, or what?) Other (Specify):
|| Memo
||
| ENDIF
|
| IF CONVERTEDTOANNUITY in HOW IRA ANNUITIZED THEN
||
|| **Q186_** AMOUNT CONVERTED TO ANNUITIES
|| About how much money was converted to annuities?
|| Range: 0..99999996
||
|| IF (AMOUNT CONVERTED TO ANNUITIES > 0 and AMOUNT CONVERTED TO ANNUITIES < 5000
) or
|| AMOUNT CONVERTED TO ANNUITIES > 250000 THEN
|||
||| **checkQ186** check Q186_
||| You entered $[] Your answers are important to us. If this is incorrect, please go back and
||| change your answer.
|||
|| ENDIF
||
|| **Q190_** INC FROM OTHER IRA ANNUITY AMT
|| About how much do you [] receive from this annuity, (before taxes and other deductions)?
|| Range: 0..99999996
||
|| IF INC FROM OTHER IRA ANNUITY AMT > 1000000 THEN
|||
||| **checkQ190** check Q190_

||| You entered $[] Your answers are important to us. If this is incorrect, please go back and
||| change your answer.
|||
|| ENDIF
||
|| IF INC FROM OTHER IRA ANNUITY AMT <> 0 and INC FROM OTHER IRA ANNUITY AMT <>
empty THEN
|||
||| **Q194_** INC FROM OTHER IRA AMOUNT PRE TAX - PER
||| About how much do you [] receive from this annuity, (before taxes and other deductions)?
||| 3 (MONTH) Month
||| 4 (QUARTER) Quarter
||| 5 (_6MONTH) 6 Month
||| 6 (YEAR) Year
||| 7 (OTHER_SPECIFY) Other (specify)
|||
||| IF INC FROM OTHER IRA AMOUNT PRE TAX - PER = (OTHER_SPECIFY) Other (specify) THEN
||||
|||| **Q195S** OTHER IRA RECV AMOUNT PRE TAX - SPECIFY
|||| (About how much do you [] receive from this annuity, (before taxes and other
|||| deductions)?) Other (Specify):
|||| Memo
||||
||| ENDIF
|||
||| **Q196_** INC TAX ON OTHER IRA PAYMENT
||| Are federal income taxes withheld on these payments?
||| 1 (YES) Yes
||| 5 (NO) No
|||
||| **Q197_** YEAR STARTED ANNUITY INC FR OTHER IRA
||| In what year did you [] [] start to receive that annuity?
||| Range: 1900..2009
|||
||| IF YEAR STARTED ANNUITY INC FR OTHER IRA > current date year THEN
|||||
||||| **checkEnteredYearGreater** YEAR ENTERED IS GREATER THAN CURRENT YEAR
||||| The year you entered is greater than today. Please go back and correct your answer.
||||
||| ENDIF
|||
||| IF YEAR STARTED ANNUITY INC FR OTHER IRA > (TWO YEARS AGO - 1) THEN
||||
|||| **Q198_** MONTH STARTED ANNUITY INC FR OTHER IRA
|||| What month was that?
|||| 1 (JAN) January
|||| 2 (FEB) February
|||| 3 (MAR) March
|||| 4 (APR) April
|||| 5 (MAY) May
|||| 6 (JUN) June
|||| 7 (JUL) July
|||| 8 (AUG) August

| | | | 9 (SEP) September
| | | | 10 (OCT) October
| | | | 11 (NOV) November
| | | | 12 (DEC) December
| | | |
| | | ENDIF
| | |
| | | [Questions Q199_Intro to Q202_ are displayed as a table]
| | |
| | | **Q199_intro** UNTIL YR REC ANNUITY FR OTHER IRA intro
| | | For how long will these annuity payments continue?
| | |
| | | **Q199_** UNTIL YR REC ANNUITY FR OTHER IRA {SE update 2/13/08}
| | |
| | | Range: 2007..2100
| | |
| | | **Q200_** UNTIL AGE REC ANNUITY FROM OTHER IRA {SE update 2/13/08}
| | |
| | | Range: 30..115
| | |
| | | **Q201_** HOW LONG ANNUITY PAYMENTS CONTINUE
| | |
| | | Range: 0..96
| | |
| | | **Q202_** YEAR REC ANNUITY FROM OTHER IRA
| | |
| | | 3 (UNTILRANDSPBTHDIE) Until R and spouse both die
| | | 4 (UNTILRDIES) Until R dies
| | | 5 (UNTILSPDIES) Until spouse dies
| | | 6 (UNTILMONEYRUNSOUT) Until money runs out
| | | 7 (OTHER_SPECIFY) Other (specify)
| | |
| | | IF (UNTIL AGE REC ANNUITY FROM OTHER IRA {SE update 2/13/08} >= 30 and UNTIL AGE REC
| | | ANNUITY FROM OTHER IRA {SE update 2/13/08} <= 64) THEN
| | | |
| | | | **checkQ200** check Q200_
| | | | You entered $[] Your answers are important to us. If this is incorrect, please go back
| | | | and change your answer.
| | | |
| | | ENDIF
| | |
| | | IF (HOW LONG ANNUITY PAYMENTS CONTINUE >= 51 and HOW LONG ANNUITY PAYMENTS
CONTINUE <=
| | | 96) THEN
| | | |
| | | | **checkQ201** check Q201_
| | | | You entered $[] Your answers are important to us. If this is incorrect, please go back
| | | | and change your answer.
| | | |
| | | ENDIF
| | |
| | | IF UNTIL YR REC ANNUITY FR OTHER IRA {SE update 2/13/08} = empty and UNTIL AGE REC
| | | ANNUITY FROM OTHER IRA {SE update 2/13/08} = empty and HOW LONG ANNUITY PAYMENTS

CONTINUE
||| = empty and YEAR REC ANNUITY FROM OTHER IRA = empty THEN
||||
|||| **checkAtLeastOne** must answer at least 1 of last 4 questions
|||| You must answer at least one of the last four questions. Your answers are important to
|||| us. Please go back and answer to the best of your ability.
||||
||| ENDIF
|||
||| IF YEAR REC ANNUITY FROM OTHER IRA = (OTHER_SPECIFY) Other (specify) THEN
||||
|||| **Q203S** H/LONG REC ANNU FROM OTH IRA - SPECIFY
|||| (For how long will these annuity payments continue?) Other (Specify):
|||| Memo
||||
||| ENDIF
|||
|| ENDIF
||
| ENDIF
|
| IF CASHEDINACCOUNT in HOW IRA ANNUITIZED THEN
||
|| **Q204_** AMT WITHDRAWN FROM OTHER IRA
|| About how much money was withdrawn?
|| Range: 0..99999996
||
|| IF (AMT WITHDRAWN FROM OTHER IRA > 0 and AMT WITHDRAWN FROM OTHER IRA < 5000) or AMT
|| WITHDRAWN FROM OTHER IRA > 250000 THEN
|||
||| **checkQ204** check Q204_
||| You entered $[] Your answers are important to us. If this is incorrect, please go back and
||| change your answer.
|||
|| ENDIF
||
|| **Q208M** DO WITH AMT WITHDRAWN OTHER IRA {SE update 2/13/08}
|| What did you do with the funds? Were they put into savings, used for regular expenses, used
|| for special purchases, given to relatives, or what? Choose all that apply
|| 1 (PUTINSAVINGS) Put in savings
|| 2 (USEDFORREGULAREXPENSES) Used for regular expenses
|| 3 (USEDFORSPECIALPURCHASES) Used for special purchases
|| 4 (GIVENTORELATIVES) Given to relatives
|| 7 (OTHER_SPECIFY) Other (specify)
||
|| IF OTHER_SPECIFY in DO WITH AMT WITHDRAWN OTHER IRA {SE update 2/13/08} THEN
|||
||| **Q209S** WHAT DO WITH AMT W/D OTHER IRA - SPECIFY
||| (What did you do with the funds? Were they put into savings, used for regular expenses,
||| used for special purchases, given to relatives, or what?) Other (Specify):
||| Memo
|||

| | ENDIF
| |
| ENDIF
|
ENDIF

IF IRA OR KEOGH = (YES) Yes THEN
|
| **Q210_** NEW MONEY INTO IRA OR KEOGH
| Did you [] [] put any new money into IRA or KEOGH accounts [][]?
| 1 (YES) Yes
| 5 (NO) No
|
| IF NEW MONEY INTO IRA OR KEOGH = (YES) Yes THEN
| |
| | **Q211_** AMT NEW MONEY ADDED TO IRA
| | About how much new money did you [] [] put into these accounts [][]?
| | Range: 0..999996
| |
| | IF (AMT NEW MONEY ADDED TO IRA > 0 and AMT NEW MONEY ADDED TO IRA < 100) or AMT NEW
| | MONEY ADDED TO IRA > 20000 THEN
| | |
| | | **checkQ211** check Q211_
| | | You entered $[] Your answers are important to us. If this is incorrect, please go back and
| | | change your answer.
| | |
| | ENDIF
| |
| ENDIF
|
ENDIF

Q215_ PENSION RETIREMENT INCOME
Not including Social Security or other retirement income you've already entered, are you [] []
currently receiving any other income from retirement pensions? Do not include any lump-sum
pension payments. Do not include any military pension you've already entered.
1 (YES) Yes
5 (NO) No

IF PENSION RETIREMENT INCOME <> (NO) No and PENSION RETIREMENT INCOME <>
NONRESPONSE THEN
|
| IF (COUPLENESS STATUS OF INDIVIDUAL <> (MARRIED) Married and COUPLENESS STATUS OF
| INDIVIDUAL <> (PARTNERED_VOL) Partnered) THEN
| |
| ELSE
| |
| | **Q216_** WHO REC PENSION RETIREMENT INC
| | Who receives that?
| | 1 (RESPONDENTONLY) Respondent only
| | 2 (SPOUSE_PARTNERONLY) Spouse/partner only
| | 3 (BTH) Both

| |
| ENDIF
|
| IF WHO REC PENSION RETIREMENT INC <> (SPOUSE_PARTNERONLY) Spouse/partner only and WHO REC
| PENSION RETIREMENT INC <> NONRESPONSE THEN
| |
| | **Q217_** R INCOME FR MORE THAN ONE PENSION
| | [] Do you[]_2 receive income from more than one retirement pension?
| | 1 (YES) Yes
| | 5 (NO) No
| |
| | IF R INCOME FR MORE THAN ONE PENSION = (NO) No or R INCOME FR MORE THAN ONE PENSION =
| | NONRESPONSE THEN
| | |
| | ELSE
| | |
| | | **Q218_** NUMBER OF PENSIONS R RECEIVED
| | | How many retirement pensions do you receive?
| | | Range: 0..50
| | |
| | ENDIF
| |
| | IF NUMBER OF PENSIONS R RECEIVED <> 0 THEN
| | |
| | | IF R INCOME FR MORE THAN ONE PENSION <> empty THEN
| | | |
| | | | LOOP FROM 1 TO 2 DO
| | | | |
| | | | | IF cnt < NUMBER OF PENSIONS R RECEIVED or cnt = NUMBER OF PENSIONS R RECEIVED THEN
| | | | | |
| | | | | | **Q220A** R AMT RECV FR PENSION LAST MONTH {SE update 2/13/08}
| | | | | | [] How much did you receive last month from []_2 pension, (before taxes and other
| | | | | | deductions)?
| | | | | | Range: 0..9999996
| | | | | |
| | | | | | IF (R AMT RECV FR PENSION LAST MONTH {SE update 2/13/08} > 0 and R AMT RECV FR
| | | | | | PENSION LAST MONTH {SE update 2/13/08} < 250) or R AMT RECV FR PENSION LAST MONTH
| | | | | | {SE update 2/13/08} > 10000 THEN
| | | | | | |
| | | | | | | **checkQ220A** check Q220A
| | | | | | | You entered $[] Your answers are important to us. If this is incorrect, please go
| | | | | | | back and change your answer.
| | | | | | |
| | | | | | ENDIF
| | | | | |
| | | | | | **Q224A** R TAX WITHHELD ON PENSION {SE update 2/13/08}
| | | | | | Were any federal income taxes withheld on that?
| | | | | | 1 (YES) Yes
| | | | | | 5 (NO) No

| | | | | |

| | | | | | **Q225A** R PENS CHOOSE DIFF AMT NEXT MONTH {SE update 2/13/08}

| | | | | | If you wanted to, could you choose to receive a larger or smaller amount from that

| | | | | | pension next month?

| | | | | | 1 (YES) Yes

| | | | | | 5 (NO) No

| | | | | |

| | | | | | **Q226A** R PENS WITHDRAW THIS MONTH {SE update 2/13/08}

| | | | | | Could you withdraw some or all of the money from that pension plan this month?

| | | | | | 1 (YES) Yes

| | | | | | 5 (NO) No

| | | | | |

| | | | | | IF R PENS WITHDRAW THIS MONTH {SE update 2/13/08} <> (NO) No and R PENS WITHDRAW

| | | | | | THIS MONTH {SE update 2/13/08} <> NONRESPONSE THEN

| | | | | | |

| | | | | | | **Q227A** R AMOUNT IN PENSION ACCT {SE update 2/13/08}

| | | | | | | About how much is in this pension account?

| | | | | | | Range: 0..99999996

| | | | | | |

| | | | | | | IF (R AMOUNT IN PENSION ACCT {SE update 2/13/08} > 0 and R AMOUNT IN PENSION

| | | | | | | ACCT {SE update 2/13/08} < 5000) or R AMOUNT IN PENSION ACCT {SE update 2/13

| | | | | | | 08} > 250000 THEN

| | | | | | | |

| | | | | | | | **checkQ227A** check Q227A

| | | | | | | | You entered $[] Your answers are important to us. If this is incorrect, please

| | | | | | | | go back and change your answer.

| | | | | | | |

| | | | | | | ENDIF

| | | | | | |

| | | | | | ENDIF

| | | | | |

| | | | | | **Q231A** R YEAR PENSION STARTED {SE update 2/13/08}

| | | | | | In what year did you first begin to receive that pension?

| | | | | | Range: 1900..2009

| | | | | |

| | | | | | IF R YEAR PENSION STARTED {SE update 2/13/08} > current date year THEN

| | | | | | |

| | | | | | | **checkEnteredYearGreater** YEAR ENTERED IS GREATER THAN CURRENT YEAR

| | | | | | | The year you entered is greater than today. Please go back and correct your answer.

| | | | | | |

| | | | | | ENDIF

| | | | | |

| | | | | | IF R YEAR PENSION STARTED {SE update 2/13/08} >(TWO YEARS AGO - 1) THEN

| | | | | | |

| | | | | | | **Q232A** R MONTH PENSION STARTED {SE update 2/13/08}

| | | | | | | What month was that?

| | | | | | | 1 (JAN) January

| | | | | | | 2 (FEB) February

| | | | | | | 3 (MAR) March

| | | | | | | 4 (APR) April

| | | | | | | 5 (MAY) May

| | | | | | | 6 (JUN) June

| | | | | | | 7 (JUL) July

| | | | | | | 8 (AUG) August
| | | | | | | 9 (SEP) September
| | | | | | | 10 (OCT) October
| | | | | | | 11 (NOV) November
| | | | | | | 12 (DEC) December
| | | | | | |
| | | | | | ENDIF
| | | | | |
| | | | | | **Q233A** R PENSION PMT- IF COLA ADJUSTMENT {SE update 2/13/08}
| | | | | | Is the pension payment automatically adjusted for changes in the cost of living?
| | | | | | 1 (YES) Yes
| | | | | | 5 (NO) No
| | | | | |
| | | | | | **Q234A** R PENSION PAYMENT CONTINUE FOR LIFE {SE update 2/13/08}
| | | | | | Will this payment continue for as long as you live?
| | | | | | 1 (YES) Yes
| | | | | | 5 (NO) No
| | | | | |
| | | | | | IF R PENSION PAYMENT CONTINUE FOR LIFE {SE update 2/13/08} <> (YES) Yes and R
| | | | | | PENSION PAYMENT CONTINUE FOR LIFE {SE update 2/13/08} <> NONRESPONSE THEN
| | | | | | |
| | | | | | | **Q235A** R HOW LONG PENSION PMT CONTINUE {SE update 2/13/08}
| | | | | | | For how many years will it continue?
| | | | | | | Range: 0..100
| | | | | | |
| | | | | | ENDIF
| | | | | |
| | | | | | **Q236A** R PENSION CHANGE AT DEATH {SE update 2/13/08}
| | | | | | If you were to die [], would the payment stop, continue unchanged, or continue at a
| | | | | | reduced level?
| | | | | | 1 (STOP) Stop
| | | | | | 2 (CONTINUEUNCHANGED) Continue unchanged
| | | | | | 3 (CONTINUEATREDUCEDLEVEL) Continue at reduced level
| | | | | | 7 (OTHER_SPECIFY) Other (specify)
| | | | | |
| | | | | | IF R PENSION CHANGE AT DEATH {SE update 2/13/08} = (OTHER_SPECIFY) Other (specify)
| | | | | | THEN
| | | | | | |
| | | | | | | **Q237S** PENSION STOP W/ DEATH - SPECIFY
| | | | | | | (If you were to die [], would the payment stop, continue unchanged,or continue at
| | | | | | | a reduced level?) Other (Specify):
| | | | | | | Memo
| | | | | | |
| | | | | | ENDIF
| | | | | |
| | | | | ENDIF
| | | | |
| | | | ENDDO
| | | |
| | | ENDIF
| | |
| | | IF NUMBER OF PENSIONS R RECEIVED > 2 THEN
| | | |

| | | | **Q238_** OTHER PENSIONS
| | | | About the other retirement pensions that you receive, tell me about how much in total
| | | | you received last month, (before taxes and other deductions)?
| | | | Range: 0..9999996
| | | |
| | | | IF (OTHER PENSIONS > 0 and OTHER PENSIONS < 250) or OTHER PENSIONS > 10000 THEN
| | | | |
| | | | | **checkQ238** check Q238_
| | | | | You entered $[] Your answers are important to us. If this is incorrect, please go back
| | | | | and change your answer.
| | | | |
| | | | ENDIF
| | | |
| | | | **Q242_** TAXES W/HELD OTR PENSIONS
| | | | Were any federal income taxes withheld on these?
| | | | 1 (YES) Yes
| | | | 5 (NO) No
| | | |
| | | ENDIF
| | |
| | ENDIF
| |
| ENDIF
|
| IF WHO REC PENSION RETIREMENT INC = (SPOUSE_PARTNERONLY) Spouse/partner only or WHO REC
| PENSION RETIREMENT INC = (BTH) Both THEN
| |
| | **Q243_** SP PENSION
| | [] Does [] currently receive more than one such pension?
| | 1 (YES) Yes
| | 5 (NO) No
| |
| | IF SP PENSION = (NO) No or SP PENSION = NONRESPONSE THEN
| | |
| | ELSE
| | |
| | | **Q244_** SP NUMBER OF PENSIONS
| | | How many such pensions does your [] receive?
| | | Range: 0..50
| | |
| | ENDIF
| |
| | IF SP NUMBER OF PENSIONS > 0 and SP NUMBER OF PENSIONS <> empty THEN
| | |
| | | LOOP FROM 1 TO 2 DO
| | | |
| | | | IF CNT1 < SP NUMBER OF PENSIONS or CNT1 = SP NUMBER OF PENSIONS THEN
| | | | |
| | | | | **Q246A** SP AMT RECV FR PENSION - LAST MONTH {SE update 2/13/08}
| | | | | [] How much did [] receive last month from []_2 pension, (before taxes and other
| | | | | deductions)?
| | | | | Range: 0..9999996

| | | | |
| | | | | IF (SP AMT RECV FR PENSION - LAST MONTH {SE update 2/13/08} > 0 and SP AMT RECV FR
| | | | | PENSION - LAST MONTH {SE update 2/13/08} < 250) or SP AMT RECV FR PENSION - LAST
| | | | | MONTH {SE update 2/13/08} > 10000 THEN
| | | | | |
| | | | | | **checkQ246A** check Q246A
| | | | | | You entered $[] Your answers are important to us. If this is incorrect, please go
| | | | | | back and change your answer.
| | | | | |
| | | | | ENDIF
| | | | |
| | | | | **Q250A** SP TAX WITHHELD ON PENSION {SE update 2/13/08}
| | | | | Were any federal income taxes withheld on that?
| | | | | 1 (YES) Yes
| | | | | 5 (NO) No
| | | | |
| | | | | **Q251A** SP PENS CHOOSE DIFF AMT NEXT MONTH {SE update 2/13/08}
| | | | | If [] wanted to, could [] choose to receive a larger or smaller amount from that
| | | | | pension next month?
| | | | | 1 (YES) Yes
| | | | | 5 (NO) No
| | | | |
| | | | | **Q252A** SP PENS WITHDRAW THIS MONTH {SE update 2/13/08}
| | | | | Could [] withdraw some or all of the money from that pension plan this month?
| | | | | 1 (YES) Yes
| | | | | 5 (NO) No
| | | | |
| | | | | IF SP PENS WITHDRAW THIS MONTH {SE update 2/13/08} <> (NO) No and SP PENS WITHDRAW
| | | | | THIS MONTH {SE update 2/13/08} <> NONRESPONSE THEN
| | | | | |
| | | | | | **Q253A** SP AMOUNT IN PENSION ACCT {SE update 2/13/08}
| | | | | | About how much money is in this pension account?
| | | | | | Range: 0..99999996
| | | | | |
| | | | | | IF (SP AMOUNT IN PENSION ACCT {SE update 2/13/08} > 0 and SP AMOUNT IN PENSION
| | | | | | ACCT {SE update 2/13/08} < 5000) or SP AMOUNT IN PENSION ACCT {SE update 2/13/08}
| | | | | | > 250000 THEN
| | | | | | |
| | | | | | | **checkQ253A** check Q253A
| | | | | | | You entered $[] Your answers are important to us. If this is incorrect, please go
| | | | | | | back and change your answer.
| | | | | | |
| | | | | | ENDIF
| | | | | |
| | | | | ENDIF
| | | | |
| | | | | **Q257A** SP YEAR PENSION STARTED {SE update 2/13/08}
| | | | | In what year did [] first begin to receive that pension?
| | | | | Range: 1900..2009
| | | | |
| | | | | IF SP YEAR PENSION STARTED {SE update 2/13/08} > current date year THEN
| | | | | |
| | | | | | **checkEnteredYearGreater** YEAR ENTERED IS GREATER THAN CURRENT YEAR

|||||| The year you entered is greater than today. Please go back and correct your answer.
||||||
||||| ENDIF
|||||
||||| IF SP YEAR PENSION STARTED {SE update 2/13/08} > (TWO YEARS AGO -1) THEN
||||||
|||||| **Q258A** SP MONTH PENSION STARTED {SE update 2/13/08}
|||||| What month was that?
|||||| 1 (JAN) January
|||||| 2 (FEB) February
|||||| 3 (MAR) March
|||||| 4 (APR) April
|||||| 5 (MAY) May
|||||| 6 (JUN) June
|||||| 7 (JUL) July
|||||| 8 (AUG) August
|||||| 9 (SEP) September
|||||| 10 (OCT) October
|||||| 11 (NOV) November
|||||| 12 (DEC) December
||||||
||||| ENDIF
|||||
||||| **Q259A** SP IF COLA ADJUSTMENT - PENSION {SE update 2/13/08}
||||| Is the pension payment automatically adjusted for changes in the cost of living?
||||| 1 (YES) Yes
||||| 5 (NO) No
|||||
||||| **Q260A** SP PENSION PAYMENT CONTINUE FOR LIFE {SE update 2/13/08}
||||| Will this payment continue for as long as [] lives?
||||| 1 (YES) Yes
||||| 5 (NO) No
|||||
||||| IF SP PENSION PAYMENT CONTINUE FOR LIFE {SE update 2/13/08} <> (YES) Yes and SP
||||| PENSION PAYMENT CONTINUE FOR LIFE {SE update 2/13/08} <> NONRESPONSE THEN
||||||
|||||| **Q261A** SP HOW LONG PENSION PMT CONTINUE {SE update 2/13/08}
|||||| For how many years will it continue?
|||||| Range: 0..100
||||||
||||| ENDIF
|||||
||||| **Q262A** SP PENSION CHANGE AT DEATH {SE update 2/13/08}
||||| If [] were to die[], would the payment stop, continue unchanged, or continue at a
||||| reduced level?
||||| 1 (STOP) Stop
||||| 2 (CONTINUEUNCHANGED) Continue unchanged
||||| 3 (CONTINUEATREDUCEDLEVEL) Continue at reduced level
||||| 7 (OTHER_SPECIFY) Other (specify)
|||||
||||| IF SP PENSION CHANGE AT DEATH {SE update 2/13/08} = (OTHER_SPECIFY) Other (specify)
||||| THEN
||||||

| | | | | | **Q263S** H/W/P LARGEST PENS PMT CONT PAST DEATH
| | | | | | (If [] were to die[], would the payment stop, continue unchanged, or continue at a
| | | | | | reduced level?) Other (Specify):
| | | | | | Memo
| | | | | |
| | | | | ENDIF
| | | | |
| | | | ENDIF
| | | |
| | | ENDDO
| | |
| | ENDIF
| |
| ENDIF
|
ENDIF

IF (WHO REC PENSION RETIREMENT INC = (SPOUSE_PARTNERONLY) Spouse/partner only OR WHO REC
PENSION RETIREMENT INC = (BTH) Both) AND SP NUMBER OF PENSIONS > 2 THEN
|
| **Q264_SPOthRetPens** SP ALL OTH PENS AMT REC - LAST MONTH
| About the other retirement pensions [] receives, about how much in total did [] receive last
| month, (before taxes and other deductions)?
| Range: 0..9999996
|
| IF (SP ALL OTH PENS AMT REC - LAST MONTH > 0 or SP ALL OTH PENS AMT REC - LAST MONTH < 250
|) or SP ALL OTH PENS AMT REC - LAST MONTH > 10000 THEN
| |
| | **checkQ264** check Q264_SPOthRetPens
| | You entered $[] Your answers are important to us. If this is incorrect, please go back and
| | change your answer.
| |
| ENDIF
|
| **Q268_** SP OTH PENS AMT TAXES W/HELD
| Were any federal income taxes withheld on these?
| 1 (YES) Yes
| 5 (NO) No
|

|
| **Q269_** PENSION INCOME NOT SS - LAST MONTH
| Overall, about how much did you [] [] receive last month from retirement pensions, not
| including Social Security?
| Range: 0..9999996
|
| IF (PENSION INCOME NOT SS - LAST MONTH > 0 or PENSION INCOME NOT SS - LAST MONTH < 250)
| or PENSION INCOME NOT SS - LAST MONTH > 10000 THEN
| |
| | **checkQ269** check Q269

|| You entered $[] Your answers are important to us. If this is incorrect, please go back and
|| change your answer.
||
| ENDIF
|
ENDIF

Q273_ R OR SP INCOME FROM ANNUITIES
Aside from anything you have already entered, are you [] [] currently receiving any income from
annuities?
1 (YES) Yes
5 (NO) No

IF R OR SP INCOME FROM ANNUITIES <> (NO) No and R OR SP INCOME FROM ANNUITIES <>
NONRESPONSE
THEN
|
| IF COUPLENESS STATUS OF INDIVIDUAL <> (MARRIED) Married and COUPLENESS STATUS OF
INDIVIDUAL
| <> (PARTNERED_VOL) Partnered THEN
||
| ELSE
||
|| **Q274_** WHO RECEIVED INC FROM ANNUITIES
|| Who receives that?
|| 1 (RESPONDENTONLY) Respondent only
|| 2 (SPOUSE_PARTNERONLY) Spouse/partner only
|| 3 (BTH) Both
||
| ENDIF
|
| IF WHO RECEIVED INC FROM ANNUITIES <> NONRESPONSE THEN
||
|| IF WHO RECEIVED INC FROM ANNUITIES <> (SPOUSE_PARTNERONLY) Spouse/partner only
THEN
|||
||| **Q275_** R INCOME FROM MORE THAN ONE ANNUITY {SE update 2/13/08}
||| [] Do you[]_2 receive income from more than one annuity?
||| 1 (YES) Yes
||| 5 (NO) No
|||
||| IF R INCOME FROM MORE THAN ONE ANNUITY {SE update 2/13/08} = (NO) No or R INCOME
FROM
||| MORE THAN ONE ANNUITY {SE update 2/13/08} = NONRESPONSE THEN
||||
||| ELSE
||||
|||| **Q276_** R NUMBER OF ANNUITIES INCOME
|||| How many annuities do you receive?
|||| Range: 1..50
||||
|||| IF R NUMBER OF ANNUITIES INCOME > 1 THEN
|||||

| | | | |**checkQ276** check Q276_
| | | | | You wrote that you receive [R NUMBER OF ANNUITIES INCOME] annuities. Your answers are
| | | | | important to us. If this is incorrect, please go back and change your answer.
| | | | |
| | | | ENDIF
| | | |
| | | ENDIF
| | |
| | | IF R NUMBER OF ANNUITIES INCOME > 0 and R NUMBER OF ANNUITIES INCOME <>
NONRESPONSE THEN
| | | |
| | | | LOOP FROM 1 TO 2 DO
| | | | |
| | | | | IF I < R NUMBER OF ANNUITIES INCOME or I = R NUMBER OF ANNUITIES INCOME THEN
| | | | | |
| | | | | |**Q278AAnnuityIncLMO** R AMT FROM ANNUITY - LAST MONTH {SE update 2/13/08}
| | | | | | [] How much did you receive last month from []_2, (before taxes and other
| | | | | | deductions)?
| | | | | | Range: 0..9999996
| | | | | |
| | | | | | IF (R AMT FROM ANNUITY - LAST MONTH {SE update 2/13/08} > 0 and R AMT FROM
| | | | | | ANNUITY - LAST MONTH {SE update 2/13/08} < 250) and R AMT FROM ANNUITY - LAST
| | | | | | MONTH {SE update 2/13/08} > 10000 THEN
| | | | | | |
| | | | | | |**checkQ278A** check Q278AAnnuityIncLMO
| | | | | | | You entered $[] Your answers are important to us. If this is incorrect, please go
| | | | | | | back and change your answer.
| | | | | | |
| | | | | | ENDIF
| | | | | |
| | | | | | IF R AMT FROM ANNUITY - LAST MONTH {SE update 2/13/08} <> 0 or R AMT FROM
| | | | | | ANNUITY - LAST MONTH {SE update 2/13/08} = NONRESPONSE THEN
| | | | | | |
| | | | | | |**Q282A** R TAXES WITHHELD FROM ANNUITY PMT {SE update 2/13/08}
| | | | | | | Were any federal income taxes withheld on that?
| | | | | | | 1 (YES) Yes
| | | | | | | 5 (NO) No
| | | | | | |
| | | | | | |**Q283A** R YEAR ANNUITY PMT STARTED {SE update 2/13/08}
| | | | | | | In what year did you start to receive that annuity payment?
| | | | | | | Range: 1900..2009
| | | | | | |
| | | | | | | IF R YEAR ANNUITY PMT STARTED {SE update 2/13/08} > current date year THEN
| | | | | | | |
| | | | | | | |**checkEnteredYearGreater** YEAR ENTERED IS GREATER THAN CURRENT YEAR
| | | | | | | | The year you entered is greater than today. Please go back and correct your
| | | | | | | | answer.
| | | | | | | |
| | | | | | | ENDIF
| | | | | | |
| | | | | | | IF R YEAR ANNUITY PMT STARTED {SE update 2/13/08} = TWO YEARS AGO or R YEAR
| | | | | | | ANNUITY PMT STARTED {SE update 2/13/08} > TWO YEARS AGO THEN
| | | | | | | |

| | | | | | | | **Q284A** R MONTH ANNUITY PMT STARTED {SE update 2/13/08}
| | | | | | | | What month was that?
| | | | | | | | 1 (JAN) January
| | | | | | | | 2 (FEB) February
| | | | | | | | 3 (MAR) March
| | | | | | | | 4 (APR) April
| | | | | | | | 5 (MAY) May
| | | | | | | | 6 (JUN) June
| | | | | | | | 7 (JUL) July
| | | | | | | | 8 (AUG) August
| | | | | | | | 9 (SEP) September
| | | | | | | | 10 (OCT) October
| | | | | | | | 11 (NOV) November
| | | | | | | | 12 (DEC) December
| | | | | | | |
| | | | | | | ENDIF
| | | | | | |
| | | | | | | **Q285A** R ANNUITY PMT- IF COLA ADJUSTMENT {SE update 2/13/08}
| | | | | | | Is the annuity payment automatically adjusted for changes in the cost of living?
| | | | | | | 1 (YES) Yes
| | | | | | | 5 (NO) No
| | | | | | |
| | | | | | | **Q286A** R ANNUITY PMT CONTINUE FOR LIFE {SE update 2/13/08}
| | | | | | | Will this payment continue for as long as you live?
| | | | | | | 1 (YES) Yes
| | | | | | | 5 (NO) No
| | | | | | |
| | | | | | | IF R ANNUITY PMT CONTINUE FOR LIFE {SE update 2/13/08} <> (YES) Yes and R
| | | | | | | ANNUITY PMT CONTINUE FOR LIFE {SE update 2/13/08} <> NONRESPONSE THEN
| | | | | | | |
| | | | | | | | **Q287A** R HOW LONG ANNUITY PMT CONTINUE {SE update 2/13/08}
| | | | | | | | For how many years will it continue?
| | | | | | | | Range: 0..100
| | | | | | | |
| | | | | | | ENDIF
| | | | | | |
| | | | | | | **Q288A** R ANNUITY PMT CHANGE AT DEATH {SE update 2/13/08}
| | | | | | | If you were to die[], would the payment stop, continue unchanged, or continue at a
| | | | | | | reduced level?
| | | | | | | 1 (STOP) Stop
| | | | | | | 2 (CONTINUEUNCHANGED) Continue unchanged
| | | | | | | 3 (CONTINUEATREDUCEDLEVEL) Continue at reduced level
| | | | | | | 7 (OTHER_SPECIFY) Other (specify)
| | | | | | |
| | | | | | | IF R ANNUITY PMT CHANGE AT DEATH {SE update 2/13/08} = (OTHER_SPECIFY) Other
| | | | | | | (specify) THEN
| | | | | | | |
| | | | | | | | **Q289S** R LGST ANN PMT CONT AFT DEATH-SPECIFY
| | | | | | | | (If you were to die[], would the payment stop, continue unchanged, or continue
| | | | | | | | at a reduced level?) Other (Specify):
| | | | | | | | Memo
| | | | | | | |
| | | | | | | ENDIF

| | | | | | | |
| | | | | | | ENDIF
| | | | | |
| | | | | ENDIF
| | | | |
| | | | ENDDO
| | | |
| | | ENDIF
| | |
| | | IF R NUMBER OF ANNUITIES INCOME > 2 THEN
| | | |
| | | | **Q290_** OTHER ANNUITIES
| | | | About the other annuity payments that you receive, about how much in total did you
| | | | receive last month, (before taxes and other deductions)?
| | | | Range: 0..9999996
| | | |
| | | | IF (OTHER ANNUITIES > 0 and OTHER ANNUITIES < 250) or OTHER ANNUITIES > 10000 THEN
| | | | |
| | | | | **checkQ290** check Q290_
| | | | | You entered $[] Your answers are important to us. If this is incorrect, please go back
| | | | | and change your answer.
| | | | |
| | | | ENDIF
| | | |
| | | | **Q294_** TAX W/HELD OTR ANNUITIES
| | | | Were any federal income taxes withheld on these?
| | | | 1 (YES) Yes
| | | | 5 (NO) No
| | | |
| | | ENDIF
| | |
| | ENDIF
| |
| | IF WHO RECEIVED INC FROM ANNUITIES = (SPOUSE_PARTNERONLY) Spouse/partner only or WHO
| | RECEIVED INC FROM ANNUITIES = (BTH) Both THEN
| | |
| | | **Q295_** MORE THAN ONE ANNUITY SP
| | | Now let's think about the annuity payments received by your [] Does [] currently receive
| | | more than one such annuity payment?
| | | 1 (YES) Yes
| | | 5 (NO) No
| | |
| | | IF MORE THAN ONE ANNUITY SP = (NO) No or MORE THAN ONE ANNUITY SP = NONRESPONSE THEN
| | | |
| | | ELSE
| | | |
| | | | **Q296_** NUMBER OF ANNUITIES SP
| | | | How many such annuity payments does your [] receive?
| | | | Range: 1..50
| | | |
| | | | IF NUMBER OF ANNUITIES SP > 1 THEN

|||||
||||| **checkQ296** check Q296_
||||| You wrote that you receive [NUMBER OF ANNUITIES SP] annuities. Your answers are
||||| important to us. If this is incorrect, please go back and change your answer.
|||||
|||| ENDIF
||||
||| ENDIF
|||
||| IF NUMBER OF ANNUITIES SP > 0 THEN
||||
|||| LOOP FROM 1 TO 2 DO
|||||
||||| IF I < NUMBER OF ANNUITIES SP or I = NUMBER OF ANNUITIES SP THEN
||||||
|||||| **Q298A** SP AMT FROM ANNUITY - LAST MONTH {SE update 2/13/08}
|||||| [] []_2 much did [] receive last month from []_3, (before taxes and other
|||||| deductions)?
|||||| Range: 0..9999996
||||||
|||||| IF (SP AMT FROM ANNUITY - LAST MONTH {SE update 2/13/08} > 0 and SP AMT FROM
|||||| ANNUITY - LAST MONTH {SE update 2/13/08} < 250) or SP AMT FROM ANNUITY - LAST
|||||| MONTH {SE update 2/13/08} > 10000 THEN
|||||||
||||||| **checkQ298A** check Q298A
||||||| You entered $[] Your answers are important to us. If this is incorrect, please go
|||||| back and change your answer.
|||||||
|||||| ENDIF
||||||
|||||| IF SP AMT FROM ANNUITY - LAST MONTH {SE update 2/13/08} <> 0 or SP AMT FROM
|||||| ANNUITY - LAST MONTH {SE update 2/13/08} = NONRESPONSE THEN
|||||||
||||||| **Q302A** SP TAXES WITHHELD FROM ANNUITY PMT {SE update 2/13/08}
|||||| Were any federal income taxes withheld on that?
||||||| 1 (YES) Yes
||||||| 5 (NO) No
|||||||
||||||| **Q303A** SP YEAR ANNUITY PMT STARTED {SE update 2/13/08}
|||||| In what year did [] start to receive that annuity payment?
||||||| Range: 1900..2009
|||||||
||||||| IF SP YEAR ANNUITY PMT STARTED {SE update 2/13/08} > current date year THEN
||||||||
|||||||| **checkEnteredYearGreater** YEAR ENTERED IS GREATER THAN CURRENT YEAR
|||||||| The year you entered is greater than today. Please go back and correct your
||||||| answer.
||||||||
|||||| ENDIF
|||||||
||||||| IF SP YEAR ANNUITY PMT STARTED {SE update 2/13/08} = TWO YEARS AGO or SP YEAR
|||||| ANNUITY PMT STARTED {SE update 2/13/08} > TWO YEARS AGO THEN
||||||||

| | | | | | | | **Q304A** SP MONTH ANNUITY PMT STARTED {SE update 2/13/08}
| | | | | | | | What month was that?
| | | | | | | | 1 (JAN) January
| | | | | | | | 2 (FEB) February
| | | | | | | | 3 (MAR) March
| | | | | | | | 4 (APR) April
| | | | | | | | 5 (MAY) May
| | | | | | | | 6 (JUN) June
| | | | | | | | 7 (JUL) July
| | | | | | | | 8 (AUG) August
| | | | | | | | 9 (SEP) September
| | | | | | | | 10 (OCT) October
| | | | | | | | 11 (NOV) November
| | | | | | | | 12 (DEC) December
| | | | | | | |
| | | | | | | ENDIF
| | | | | | |
| | | | | | | **Q305A** SP ANNUITY PMT COLA ADJUSTMENT {SE update 2/13/08}
| | | | | | | Is the annuity payment automatically adjusted for changes in the cost of living?
| | | | | | | 1 (YES) Yes
| | | | | | | 5 (NO) No
| | | | | | |
| | | | | | | **Q306A** SP ANNUITY PMT CONTINUE FOR LIFE {SE update 2/13/08}
| | | | | | | Will this payment continue for as long as [] lives?
| | | | | | | 1 (YES) Yes
| | | | | | | 5 (NO) No
| | | | | | |
| | | | | | | IF SP ANNUITY PMT CONTINUE FOR LIFE {SE update 2/13/08} <> (YES) Yes and SP
| | | | | | | ANNUITY PMT CONTINUE FOR LIFE {SE update 2/13/08} <> NONRESPONSE THEN
| | | | | | | |
| | | | | | | | **Q307A** SP HOW LONG ANNUITY PMT CONTINUE {SE update 2/13/08}
| | | | | | | | For how many years will it continue?
| | | | | | | | Range: 0..100
| | | | | | | |
| | | | | | | ENDIF
| | | | | | |
| | | | | | | **Q308A** SP ANNUITY PMT CHANGE AT DEATH {SE update 2/13/08}
| | | | | | | If [] were to die[], would the payment stop, continue unchanged, or continue at a
| | | | | | | reduced level?
| | | | | | | 1 (STOP) Stop
| | | | | | | 2 (CONTINUEUNCHANGED) Continue unchanged
| | | | | | | 3 (CONTINUEATREDUCEDLEVEL) Continue at reduced level
| | | | | | | 7 (OTHER_SPECIFY) Other (specify)
| | | | | | |
| | | | | | | IF SP ANNUITY PMT CHANGE AT DEATH {SE update 2/13/08} = (OTHER_SPECIFY) Other
| | | | | | | (specify) THEN
| | | | | | | |
| | | | | | | | **Q309S** H/W/P LGST ANN PMT CONT AFT DTH -SPECIFY
| | | | | | | | (If [] were to die[], would the payment stop, continue unchanged, or continue at
| | | | | | | | a reduced level?) Other (Specify):
| | | | | | | | Memo
| | | | | | | |
| | | | | | | ENDIF

| | | | | | | |
| | | | | | | ENDIF
| | | | | | |
| | | | | | ENDIF
| | | | | |
| | | | ENDDO
| | | |
| | | ENDIF
| | |
| | | IF NUMBER OF ANNUITIES SP > 2 THEN
| | | |
| | | | **Q310_** SP OTH ANNUIT PMT AMT LAST MONTH
| | | | About the other annuity payments [] receive(s), about how much in total did [] receive
| | | | last month, (before taxes and other deductions)?
| | | | Range: 0..9999996
| | | |
| | | | IF (SP OTH ANNUIT PMT AMT LAST MONTH > 0 and SP OTH ANNUIT PMT AMT LAST MONTH < 250
| | | |) or SP OTH ANNUIT PMT AMT LAST MONTH > 10000 THEN
| | | | |
| | | | | **checkQ310** check Q310_
| | | | | You entered $[] Your answers are important to us. If this is incorrect, please go back
| | | | | and change your answer.
| | | | |
| | | | ENDIF
| | | |
| | | | **Q311_** SP TAXES WITHHELD FROM OTHER ANNUITY
| | | | Were any federal income taxes withheld on these?
| | | | 1 (YES) Yes
| | | | 5 (NO) No
| | | |
| | | ENDIF
| | |
| | ENDIF
| |
| ELSE
| |
| | **Q312_TotAnnuityInc** TOTAL MONTHLY ANNUITY INCOME
| | Overall, about how much income did you [] [] receive last month from annuity payments, not
| | including Social Security?
| | Range: 0..9999996
| |
| | IF (TOTAL MONTHLY ANNUITY INCOME > 0 and TOTAL MONTHLY ANNUITY INCOME < 250) or TOTAL
| | MONTHLY ANNUITY INCOME > 10000 THEN
| | |
| | | **checkQ312** check Q312_TotAnnuityInc
| | | You entered $[] Your answers are important to us. If this is incorrect, please go back and
| | | change your answer.
| | |
| | ENDIF
| |
| ENDIF

|
ENDIF

Q316_StockAssets STOCK AND STOCK MUTUAL FUNDS
[] Aside from anything you have already entered, do you [] [] have any shares of stock or stock
mutual funds?
1 (YES) Yes
5 (NO) No

IF STOCK AND STOCK MUTUAL FUNDS <> (NO) No and STOCK AND STOCK MUTUAL FUNDS <>
NONRESPONSE
THEN
|
| **Q317_AmtStock** STOCKS TOTAL VALUE
| If you [][] [][] sold all those and paid off anything you owed on them, about how much would
| you have?
| Range: -1000000..99999996
|
| IF STOCKS TOTAL VALUE < 0 or (STOCKS TOTAL VALUE > 0 and STOCKS TOTAL VALUE < 1000
) or
| STOCKS TOTAL VALUE > 500000 THEN
||
|| **checkQ317** check Q317_AmtStock
|| You entered $[] Your answers are important to us. If this is incorrect, please go back and
|| change your answer.
||
| ENDIF
|
| **Q321_** STOCK INCOME
| Do these stocks or mutual funds pay any dividends or interest?
| 1 (YES) Yes
| 5 (NO) No
|
| IF STOCK INCOME = (YES) Yes THEN
||
|| **Q322_** STOCK INCOME HOW OFTEN
|| How often is it paid?
|| 1 (ACCUMULATES) Accumulates/reinvest
|| 3 (MONTH) Month
|| 4 (QUARTER) Quarter
|| 5 (_6MONTHS) 6 months
|| 6 (YEAR) Year
|| 7 (OTHER_SPECIFY) Other (Specify)
||
|| IF STOCK INCOME HOW OFTEN = (OTHER_SPECIFY) Other (Specify) THEN
|||
||| **Q323S** R/H/W/P ST/MUT FUND INC HOW OFT-SPECIFY
||| (How often is it paid?) Other (Specify):
||| Memo
|||
|| ENDIF
||
|| IF STOCK INCOME HOW OFTEN = (MONTH) Month or STOCK INCOME HOW OFTEN =

(QUARTER) Quarter
| | or STOCK INCOME HOW OFTEN = (_6MONTHS) 6 months THEN
| | |
| | | **Q324_** STOCK INCOME AMOUNT LAST PERIOD
| | | About how much did you [] [] receive in your last payment from that, (before taxes and
| | | other deductions)?
| | | Range: 0..9999996
| | |
| | | IF STOCK INCOME AMOUNT LAST PERIOD = 0 or STOCK INCOME AMOUNT LAST PERIOD >
1000000
| | | THEN
| | | |
| | | | **checkQ324** check Q324_
| | | | You entered $[] Your answers are important to us. If this is incorrect, please go back
| | | | and change your answer.
| | | |
| | | ENDIF
| | |
| | | IF STOCK INCOME AMOUNT LAST PERIOD <> NONRESPONSE THEN
| | | |
| | | | **Q325_** STOCK INCOME AMOUNT SAME PER PERIOD
| | | | Do you [][] [][] get about the same amount each payment?
| | | | 1 (YES) Yes
| | | | 5 (NO) No
| | | |
| | | ENDIF
| | |
| | ENDIF
| |
| | IF STOCK INCOME AMOUNT SAME PER PERIOD <> (YES) Yes THEN
| | |
| | | **Q326_StockIncLCY** STOCK INCOME AMOUNT - LCY
| | | About how much did you [] [] receive from stocks or stock mutual funds in [LAST CALENDAR
| | | YR CALCULATED], (before taxes and other deductions)?
| | | Range: 0..9999996
| | |
| | | IF (STOCK INCOME AMOUNT - LCY > 0 and STOCK INCOME AMOUNT - LCY < 250) or STOCK
| | | INCOME AMOUNT - LCY > 1000000 THEN
| | | |
| | | | **checkQ326** check Q326_StockIncLCY
| | | | You entered $[] Your answers are important to us. If this is incorrect, please go back
| | | | and change your answer.
| | | |
| | | ENDIF
| | |
| | ENDIF
| |
| ENDIF
|
ENDIF

Q330_ BOND ASSETS
Aside from anything you have already entered, do you [] [] have any corporate, municipal,

government or foreign bonds, or bond funds? Do not count government savings bonds or treasury bills.
1 (YES) Yes
5 (NO) No

IF BOND ASSETS <> (NO) No AND BOND ASSETS <> NONRESPONSE THEN
|
| **Q331_AmtBonds** BOND ASSETS TOTAL VALUE
| If you [][] [][] sold all those bonds or bond funds, and paid off anything you owed on them,
| about how much would you have?
| Range: -1000000..99999996
|
| IF BOND ASSETS TOTAL VALUE < 0 or (BOND ASSETS TOTAL VALUE > 0 and BOND ASSETS TOTAL
| VALUE < 1000) or BOND ASSETS TOTAL VALUE > 250000 THEN
||
|| **checkQ331** check Q331_AmtBonds
|| You entered $[] Your answers are important to us. If this is incorrect, please go back and
|| change your answer.
||
| ENDIF
|
| **Q335_** BOND ASSET INTEREST INCOME
| Do these bonds or bond funds pay any dividends or interest?
| 1 (YES) Yes
| 5 (NO) No
|
| IF BOND ASSET INTEREST INCOME <> (NO) No AND BOND ASSET INTEREST INCOME <> NONRESPONSE THEN
||
|| **Q336_** BOND INCOME HOW OFTEN
|| How often is it paid?
|| 1 (ACCUM_REINVEST) Accumulates/Reinvest
|| 3 (MONTH) Month
|| 4 (QUARTER) Quarter
|| 5 (_6MONTHS) 6 months
|| 6 (YEAR) Year
|| 7 (OTHER_SPECIFY) Other (Specify)
||
|| IF BOND INCOME HOW OFTEN = (OTHER_SPECIFY) Other (Specify) THEN
|||
||| **Q337S** BOND INT INCOME HOW OFT PAID - SPECIFY
||| (How often is it paid?) Other (Specify):
||| Memo
|||
|| ENDIF
||
|| IF BOND INCOME HOW OFTEN = (MONTH) Month or BOND INCOME HOW OFTEN = (QUARTER) Quarter or
|| BOND INCOME HOW OFTEN = (_6MONTHS) 6 months THEN
|||
||| **Q338_** BOND INCOME AMOUNT LAST PERIOD
||| About how much did you [] [] receive in your last payment from that, (before taxes and

||| other deductions)?
||| Range: 0..9999996
|||
||| IF BOND INCOME AMOUNT LAST PERIOD > 1000000 THEN
||||
|||| **checkQ338** check Q338_
|||| You entered $[] Your answers are important to us. If this is incorrect, please go back
|||| and change your answer.
||||
||| ENDIF
|||
||| IF BOND INCOME AMOUNT LAST PERIOD <> NONRESPONSE THEN
||||
|||| **Q339_** BOND INCOME AMOUNT SAME PER PERIOD
|||| Do you [][] [][] get about the same amount each payment?
|||| 1 (YES) Yes
|||| 5 (NO) No
||||
||| ENDIF
|||
|| ENDIF
||
|| IF BOND INCOME AMOUNT SAME PER PERIOD <> (YES) Yes THEN
|||
||| **Q340_BondIncLCY** BOND INCOME AMOUNT - LCY
||| About how much did you [] [] receive from these bonds or bond funds in [LAST CALENDAR YR
||| CALCULATED], (before taxes and other deductions)?
||| Range: 0..9999996
|||
||| IF (BOND INCOME AMOUNT - LCY > 0 and BOND INCOME AMOUNT - LCY < 250) or BOND INCOME
||| AMOUNT - LCY > 1000000 THEN
||||
|||| **checkQ340** check Q340_BondIncLCY
|||| You entered $[] Your answers are important to us. If this is incorrect, please go back
|||| and change your answer.
||||
||| ENDIF
|||
|| ENDIF
||
| ENDIF
|
ENDIF

Q344_ CHECKING SAVINGS MARKET FUNDS
Aside from anything you have already entered, do you [] [] have any checking or savings accounts
or money market funds? Do not include CDs (Certificates of Deposit).
1 (YES) Yes
5 (NO) No

IF CHECKING SAVINGS MARKET FUNDS <> (NO) No AND CHECKING SAVINGS MARKET FUNDS
<> NONRESPONSE

THEN
|
| **Q345_AmtChkSave** CHECKING TOTAL VALUE
| If you added up all such accounts, about how much would they amount to right now?
| Range: 0..99999996
|
| IF (CHECKING TOTAL VALUE > 0 and CHECKING TOTAL VALUE < 1000) or CHECKING TOTAL VALUE >
| 100000 THEN
||
|| **checkQ345** check Q345_AmtChkSave
|| You entered $[] Your answers are important to us. If this is incorrect, please go back and
|| change your answer.
||
| ENDIF
|
| **Q349_** CHECKING INTEREST INCOME
| Do these accounts or money market funds pay any dividends or interest?
| 1 (YES) Yes
| 5 (NO) No
|
| IF CHECKING INTEREST INCOME <> (NO) No AND CHECKING INTEREST INCOME <>
NONRESPONSE THEN
||
|| **Q350_** CHECKING INCOME HOW OFTEN
|| How often is it paid?
|| 1 (ACCUM_REINVEST) Accumulates/reinvest
|| 3 (MONTH) Month
|| 4 (QUARTER) Quarter
|| 5 (_6MONTHS) 6 Months
|| 6 (YEAR) Year
|| 7 (OTHER_SPECIFY) Other period
||
|| IF CHECKING INCOME HOW OFTEN = (OTHER_SPECIFY) Other period THEN
|||
||| **Q351S** R/H/W/P HOW OFTEN DIVID OR INTR-SPECIFY
||| (How often is it paid?) Other (Specify):
||| Memo
|||
|| ENDIF
||
|| IF CHECKING INCOME HOW OFTEN = (MONTH) Month or CHECKING INCOME HOW OFTEN =
(QUARTER)
|| Quarter or CHECKING INCOME HOW OFTEN = (_6MONTHS) 6 Months THEN
|||
||| **Q352_** CHECKING INCOME LAST PERIOD
||| About how much did you [] [] receive in your last payment from that, (before taxes and
||| other deductions)?
||| Range: 0..9999996
|||
||| IF CHECKING INCOME LAST PERIOD > 1000000 THEN
||||
|||| **checkQ352** check Q352_

|||| You entered $[] Your answers are important to us. If this is incorrect, please go back
|||| and change your answer.
||||
||| ENDIF
|||
||| IF CHECKING INCOME LAST PERIOD <> NONRESPONSE THEN
||||
|||| **Q353_** CHECKING INCOME PER PERIOD
|||| Do you [][] [][] get about the same amount each payment?
|||| 1 (YES) Yes
|||| 5 (NO) No
||||
||| ENDIF
|||
|| ENDIF
||
|| IF CHECKING INCOME PER PERIOD <> (YES) Yes THEN
|||
||| **Q354_CheckIncLCY** CHECKING INCOME AMOUNT - LCY
||| About how much did you [] [] receive from these in [LAST CALENDAR YR CALCULATED], (before
||| taxes and other deductions)?
||| Range: 0..9999996
|||
||| IF (CHECKING INCOME AMOUNT - LCY > 0 and CHECKING INCOME AMOUNT - LCY < 250) or
||| CHECKING INCOME AMOUNT - LCY > 1000000 THEN
||||
|||| **checkQ354** check Q354_CheckIncLCY
|||| You entered $[] Your answers are important to us. If this is incorrect, please go back
|||| and change your answer.
||||
||| ENDIF
|||
|| ENDIF
||
| ENDIF
|
ENDIF

Q356_ CDS GOVT SAVINGS TBILLS
Aside from anything you have already entered, do you [] [] have any money in CDs, Government
Savings Bonds, or Treasury Bills?
1 (YES) Yes
5 (NO) No

IF CDS GOVT SAVINGS TBILLS <> (NO) No AND CDS GOVT SAVINGS TBILLS <> NONRESPONSE
THEN
|
| **Q357_AmtCD** CDS GOVT SAVINGS TBILLS TOTAL VALUE
| If you added up all such accounts, about how much would they amount to right now?
| Range: 0..99999996
|
| IF (CDS GOVT SAVINGS TBILLS TOTAL VALUE > 0 and CDS GOVT SAVINGS TBILLS TOTAL
VALUE < 1000

|) or CDS GOVT SAVINGS TBILLS TOTAL VALUE > 250000 THEN
| |
| | **checkQ357** check Q357_AmtCD
| | You entered $[] Your answers are important to us. If this is incorrect, please go back and
| | change your answer.
| |
| ENDIF
|
| **Q361_** CDS INTEREST INCOME
| Do these CDs, government bonds, or treasury bills pay any dividends or interest?
| 1 (YES) Yes
| 5 (NO) No
|
| IF CDS INTEREST INCOME <> (NO) No AND CDS INTEREST INCOME <> NONRESPONSE THEN
| |
| | **Q362_** CDS INCOME HOW OFTEN
| | How often is it paid?
| | 1 (ACCUM_REINVEST) Accumulates/Reinvest
| | 3 (MONTH) Month
| | 4 (QUARTER) Quarter
| | 5 (_6MONTHS) 6 Months
| | 6 (YEAR) Year
| | 7 (OTHER_SPECIFY) Other (Specify)
| |
| | IF CDS INCOME HOW OFTEN = (OTHER_SPECIFY) Other (Specify) THEN
| | |
| | | **Q363S** R/H/W/P HOW OFTEN GOV/SAV PAY - SPECIFY
| | | (How often is it paid?) Other (Specify):
| | | Memo
| | |
| | ENDIF
| |
| | IF CDS INCOME HOW OFTEN = (MONTH) Month or CDS INCOME HOW OFTEN = (QUARTER)
Quarter or CDS
| | INCOME HOW OFTEN = (_6MONTHS) 6 Months THEN
| | |
| | | **Q364_** CDS INCOME LAST PERIOD
| | | About how much did you [] [] receive in your last payment from that, (before taxes and
| | | other deductions)?
| | | Range: 0..9999996
| | |
| | | IF CDS INCOME LAST PERIOD > 1000000 THEN
| | | |
| | | | **checkQ364** check Q364_
| | | | You entered $[] Your answers are important to us. If this is incorrect, please go back
| | | | and change your answer.
| | | |
| | | ENDIF
| | |
| | | IF CDS INCOME LAST PERIOD <> NONRESPONSE THEN
| | | |
| | | | **Q365_** CDS INCOME SAME PER PERIOD
| | | | Do you [][] [][] get about the same amount each payment?

| | | | 1 (YES) Yes
| | | | 5 (NO) No
| | | |
| | | ENDIF
| | |
| | ENDIF
| |
| | IF CDS INCOME SAME PER PERIOD <> (YES) Yes THEN
| | |
| | | **Q366_** CDS INCOME AMOUNT - LCY
| | | About how much did you [] [] receive from CD's, government bonds, or treasury bills in
| | | [LAST CALENDAR YR CALCULATED], (before taxes and other deductions)?
| | | Range: 0..9999996
| | |
| | | IF (CDS INCOME AMOUNT - LCY > 0 and CDS INCOME AMOUNT - LCY < 250) or CDS INCOME
| | | AMOUNT - LCY > 1000000 THEN
| | | |
| | | | **checkQ366** check Q366_
| | | | You entered $[] Your answers are important to us. If this is incorrect, please go back
| | | | and change your answer.
| | | |
| | | ENDIF
| | |
| | ENDIF
| |
| ENDIF
|
ENDIF

Q370_ TRANSPORTATION
Do you [] [] own anything for transportation, like cars, trucks, a trailer, a motor home, a
boat, or an airplane? Do not include leased vehicles.
1 (YES) Yes
5 (NO) No

IF TRANSPORTATION = (YES) Yes THEN
|
| **Q371_Transport** TRANSPORTATION TOTAL VALUE
| What are they worth altogether, minus anything you still owe on them?
| Range: 0..9999996
|
| IF TRANSPORTATION TOTAL VALUE > 100000 THEN
| |
| | **checkQ371** check Q371_Transport
| | You entered $[] Your answers are important to us. If this is incorrect, please go back and
| | change your answer.
| |
| ENDIF
|
ENDIF

Q375_ OTHER ASSETS
Do you [] [] have any other savings or assets, such as jewelry, money owed to you by others, a

collection for investment purposes, rights in a trust or estate where you are the beneficiary, or an annuity that you haven't already entered? Exclude the cash value of any life insurance policies.
1 (YES) Yes
5 (NO) No

IF OTHER ASSETS = (YES) Yes THEN
|
| **Q376_AmtOthAsset** OTHER ASSETS TOTAL VALUE
| If you [] [] sold all that and then paid off any debts on it, about how much would you have?
| Range: -1000000..99999996
|
| IF OTHER ASSETS TOTAL VALUE < 0 or (OTHER ASSETS TOTAL VALUE > 0 and OTHER ASSETS TOTAL
| VALUE < 2000) or OTHER ASSETS TOTAL VALUE > 250000 THEN
||
|| **checkQ376** check Q376_AmtOthAsset
|| You entered $[] Your answers are important to us. If this is incorrect, please go back and
|| change your answer.
||
| ENDIF
|
| **Q380_** OTHER ASSET INCOME
| Do any of these other savings or assets pay any income?
| 1 (YES) Yes
| 5 (NO) No
|
| IF OTHER ASSET INCOME = (YES) Yes THEN
||
|| **Q381_** OTHER ASSET INCOME AMOUNT
|| About how much income did you [][] [][] receive from these other assets in [LAST CALENDAR YR
|| CALCULATED], (before taxes and other deductions)?
|| Range: 0..9999996
||
|| IF OTHER ASSET INCOME AMOUNT > 1000000 THEN
|||
||| **checkQ381** check Q381_
||| You entered $[] Your answers are important to us. If this is incorrect, please go back and
||| change your answer.
|||
|| ENDIF
||
| ENDIF
|
ENDIF

Q395_ OTHER SOURCES OF INCOME
Other than income you have already entered, did you [] [] receive any other income in [LAST CALENDAR YR CALCULATED], for example, from private disability insurance payments, consulting fees, rent from your home or second home, odd jobs, and so forth? Do not include financial support from relatives or friends.
1 (YES) Yes
5 (NO) No

IF OTHER SOURCES OF INCOME <> (NO) No AND OTHER SOURCES OF INCOME <>
NONRESPONSE THEN
|
| **Q396_** OTHER SOURCES OF INCOME AMOUNT - LCY
| How much did you [] [] receive altogether from these other sources in [LAST CALENDAR YR
| CALCULATED], (before taxes and other deductions)?
| Range: 0..9999996
|
| IF (OTHER SOURCES OF INCOME AMOUNT - LCY > 0 and OTHER SOURCES OF INCOME
AMOUNT - LCY <
| 1000) or OTHER SOURCES OF INCOME AMOUNT - LCY > 25000 THEN
||
|| **checkQ396** check Q396_
|| You entered $[] Your answers are important to us. If this is incorrect, please go back and
|| change your answer.
||
| ENDIF
|
ENDIF

Q400_ HH FOOD STAMPS SINCE LAST IW
Did you or other family members who may have been living with you receive government food stamps
at any time []? Include immediate family members who live with you.
1 (YES) Yes
5 (NO) No

IF HH FOOD STAMPS SINCE LAST IW <> (NO) No AND HH FOOD STAMPS SINCE LAST IW <>
NONRESPONSE THEN
|
| **Q401_** WHICH MONTHS HH FOOD STAMPS
| In which months [] did you (or other family members who may have been living with you) receive
| government food stamps?
| 1 (ALLMO_INCLLASTMO) All months [] (incl last month)
| 2 (ALLMOSINCEOTHMONTH_YEAR_INCLLASTMO) All months **since** date (incl last month)
| 3 (ALLMOUNTILMO_YR_NOTINCLLASTMO) All months **until** date (**not** incl last month)
| 4 (SPECIFICMONTHS) Specific months
|
| IF WHICH MONTHS HH FOOD STAMPS = (ALLMOSINCEOTHMONTH_YEAR_INCLLASTMO) All
months **since**
| date (incl last month) or WHICH MONTHS HH FOOD STAMPS =
(ALLMOUNTILMO_YR_NOTINCLLASTMO) All
| months **until** date (**not** incl last month) THEN
||
|| **Q402_** MONTH HH STARTED RECEIVING FOOD STAMPS
|| You or your family [] receiving food stamps in what month?
|| 1 (JAN) January
|| 2 (FEB) February
|| 3 (MAR) March
|| 4 (APR) April
|| 5 (MAY) May
|| 6 (JUN) June
|| 7 (JUL) July

|| 8 (AUG) August
|| 9 (SEP) September
|| 10 (OCT) October
|| 11 (NOV) November
|| 12 (DEC) December
||
|| IF MONTH HH STARTED RECEIVING FOOD STAMPS <> Nonresponse THEN
|||
||| **Q403_** YEAR HH STARTED RECEIVING FOOD STAMPS
||| You or your family [] receiving food stamps in what year?
||| Range: 1950..2009
|||
|| ENDIF
||
|| IF YEAR HH STARTED RECEIVING FOOD STAMPS < PREV WAVE IW YEAR OF FINANCIAL R or (YEAR HH
|| STARTED RECEIVING FOOD STAMPS = PREV WAVE IW YEAR OF FINANCIAL R and MONTH HH STARTED
|| RECEIVING FOOD STAMPS <= PREV WAVE IW MONTH OF FINANCIAL R) THEN
|||
||| **checkQ402Q403** check Q402_ & Q403_
||| You entered [MONTH HH STARTED RECEIVING FOOD STAMPS], [] Your answers are important to us.
||| If these are incorrect, please go back and change your answers.
|||
|| ENDIF
||
|| IF YEAR HH STARTED RECEIVING FOOD STAMPS > current date year THEN
|||
||| **checkEnteredYearGreater** YEAR ENTERED IS GREATER THAN CURRENT YEAR
||| The year you entered is greater than today. Please go back and correct your answer.
|||
|| ENDIF
||
| ENDIF
|
| IF WHICH MONTHS HH FOOD STAMPS <> (ALLMO_INCLLASTMO) All months ^FLSinceFINPW (incl last
| month) AND WHICH MONTHS HH FOOD STAMPS <> NONRESPONSE THEN
||
|| IF WHICH MONTHS HH FOOD STAMPS = (SPECIFICMONTHS) Specific months THEN
|||
||| **Q404M** FOOD STAMPS-MONTH {SE update 2/13/08}
||| Enter all months that apply
||| 1 (JAN06) Jan 06
||| 2 (FEB06) Feb 06
||| 3 (MAR06) Mar 06
||| 4 (APR06) Apr 06
||| 5 (MAY06) May 06
||| 6 (JUN06) Jun 06
||| 7 (JUL06) Jul 06
||| 8 (AUG06) Aug 06
||| 9 (SEP06) Sep 06
||| 10 (OCT06) Oct 06

| | | 11 (NOV06) Nov 06
| | | 12 (DEC06) Dec 06
| | | 13 (ALLOF2006) All of 2006
| | | 14 (JAN07) Jan 07
| | | 15 (FEB07) Feb 07
| | | 16 (MAR07) Mar 07
| | | 17 (APR07) Apr 07
| | | 18 (MAY07) May 07
| | | 19 (JUN07) Jun 07
| | | 20 (JUL07) Jul 07
| | | 21 (AUG07) Aug 07
| | | 22 (SEP07) Sep 07
| | | 23 (OCT07) Oct 07
| | | 24 (NOV07) Nov 07
| | | 25 (DEC07) Dec 07
| | | 26 (ALLOF2007) All of 2007
| | | 27 (JAN08) Jan 08
| | | 28 (FEB08) Feb 08
| | | 29 (MAR08) Mar 08
| | | 30 (APR08) Apr 08
| | | 31 (MAY08) May 08
| | | 32 (JUN08) Jun 08
| | | 33 (JUL08) Jul 08
| | | 34 (AUG08) Aug 08
| | | 35 (SEP08) Sep 08
| | | 36 (OCT08) Oct 08
| | | 37 (NOV08) Nov 08
| | | 38 (DEC08) Dec 08
| | | 39 (ALLOF2008TODATE) All of 2008 to date
| | | 40 (ALLOF2008) All of 2008
| | | 41 (ALLOF2006_AFTERPREVIW) All of 2006 (after prev iw mo)
| | | 42 (ALLOF2005_AFTERPREVIW) All of 2005 (after prev iw mo)
| | | 43 (ALLOF2005) All of 2005
| | | 44 (ALLOF2004_AFTERPREVIW) All of 2004 (after prev iw mo)
| | | 45 (ALLOF2004) All of 2004
| | | 46 (ALLOF2003_AFTERPREVIW) All of 2003 (after prev iw mo)
| | | 47 (ALLOF2003) All of 2003
| | | 48 (ALLOF2002_AFTERPREVIW) All of 2002 (after prev iw mo)
| | | 49 (ALLOF2002) All of 2002
| | | 50 (ALLOF2001_AFTERPREVIW) All of 2001 (after prev iw mo)
| | | 51 (ALLOF2001) All of 2001
| | | 52 (ALLOF2000_AFTERPREVIW) All of 2000 (after prev iw mo)
| | | 53 (ALLOF2000) All of 2000
| | | 54 (ALLOF1999_AFTERPREVIW) All of 1999 (after prev iw mo)
| | | 55 (ALLOF1999) All of 1999
| | | 56 (ALLOF1998_AFTERPREVIW) All of 1998 (after prev iw mo)
| | | 57 (ALLOF1998) All of 1998
| | | 58 (ALLOF1997_AFTERPREVIW) All of 1997 (after prev iw mo)
| | | 59 (ALLOF1997) All of 1997
| | | 60 (ALLOF1996_AFTERPREVIW) All of 1996 (after prev iw mo)
| | | 61 (ALLOF1996) All of 1996
| | | 62 (ALLOF1995_AFTERPREVIW) All of 1995 (after prev iw mo)
| | | 63 (ALLOF1995) All of 1995

||| 64 (ALLOF1994_AFTERPREVIW) All of 1994 (after prev iw mo)
||| 65 (ALLOF1994) All of 1994
||| 66 (ALLOF1993_AFTERPREVIW) All of 1993 (after prev iw mo)
||| 67 (ALLOF1993) All of 1993
||| 68 (ALLOF1992_AFTERPREVIW) All of 1992 (after prev iw mo)
||| 69 (OTHER_SPECIFY) Other (specify)
||| 70 (JAN09) Jan 09
||| 71 (FEB09) Feb 09
||| 72 (MAR09) Mar 09
||| 73 (APR09) Apr 09
|||
||| IF OTHER_SPECIFY in FOOD STAMPS-MONTH {SE update 2/13/08} THEN
||||
|||| **Q405S** HH START REC FOOD STAMPS SPECIFY
|||| (Enter all months that apply) Other (Specify):
|||| Memo
||||
||| ENDIF
|||
|| ENDIF
||
|| IF (!(ALLOF2000_AFTERPREVIW in FOOD STAMPS-MONTH {SE update 2/13/08}) and WHICH MONTHS HH
|| FOOD STAMPS = (SPECIFICMONTHS) Specific months) or WHICH MONTHS HH FOOD STAMPS =
|| (ALLMOSINCEOTHMONTH_YEAR_INCLLASTMO) All months **since** date (incl last month) or
|| WHICH MONTHS HH FOOD STAMPS = (ALLMOUNTILMO_YR_NOTINCLLASTMO) All months **until** date
|| (**not** incl last month) THEN
|||
||| **Q406_** AMT FOOD STAMPS HH RECD - LAST MONTH
||| How many dollars worth of food stamps did you (and other family members who may have been
||| living with you) get the last month you received these stamps?
||| Range: 0..9996
|||
||| IF (AMT FOOD STAMPS HH RECD - LAST MONTH > 0 and AMT FOOD STAMPS HH RECD - LAST MONTH
||| < 51) or AMT FOOD STAMPS HH RECD - LAST MONTH > 500 THEN
||||
|||| **checkQ406** check Q406_
|||| You entered $[] Your answers are important to us. If this is incorrect, please go back
|||| and change your answer.
||||
||| ENDIF
|||
|| ENDIF
||
| ENDIF
|
| IF !((R IN NURSING HOME = (((((YES) Yes) Yes) Yes) Yes) Yes AND COUPLENESS STATUS
| OF INDIVIDUAL <> (MARRIED) Married AND COUPLENESS STATUS OF INDIVIDUAL <> (PARTNERED_VOL)
| Partnered) OR (R IN NURSING HOME = YES AND PREV WAVE R IN NURSING HOME AT PREVIOUS WAVE =

| (INNURSINGHOME) In nursing home AND INITIATION BLOCK COMPLETE = (SECOND) Second r)
OR (
| INITIATION BLOCK COMPLETE = (FIRST) First (or only) r and R IN NURSING HOME = YES AND
| SecARelationsA033_SpInNHome= yes AND SecARelationsA030_LivTogethr = Yes)) THEN
| |
| | IF (HH FOOD STAMPS SINCE LAST IW <> (NO) No AND HH FOOD STAMPS SINCE LAST IW <>
| | NONRESPONSE) and (AMT FOOD STAMPS HH RECD - LAST MONTH <> Response AND AMT
FOOD STAMPS HH
| | RECD - LAST MONTH <> NONResponse) THEN
| | |
| | | **Q410_** AMT FOOD STAMPS HH CURR REC - LAST MONTH
| | | How many dollars worth of food stamps did you (or other family members who may have been
| | | living with you) get last month?
| | | Range: 0..9996
| | |
| | | IF (AMT FOOD STAMPS HH CURR REC - LAST MONTH > 0 and AMT FOOD STAMPS HH CURR
REC - LAST
| | | MONTH < 51) or AMT FOOD STAMPS HH CURR REC - LAST MONTH > 500 THEN
| | | |
| | | | **checkQ410** check Q410_
| | | | You entered $[] Your answers are important to us. If this is incorrect, please go back
| | | | and change your answer.
| | | |
| | | ENDIF
| | |
| | ENDIF
| |
| ENDIF
|
ENDIF

Q415_ R ENOUGH FOOD SINCE LAST IW
[], have you always had enough money to buy the food you need?
1 (YES) Yes
5 (NO) No

IF R ENOUGH FOOD SINCE LAST IW <> (YES) Yes THEN
|
| **Q516_Q416** EAT LESS BC NOT ENOUGH MONEY
| In the last 12 months, did you ever eat less than you felt you should because there wasn't
| enough money to buy food?
| 1 (YES) Yes
| 5 (NO) No
|
ENDIF

LOOP FROM 1 TO 40 DO
ENDDO

LOOP FROM 1 TO 10 DO
ENDDO

LOOP FROM 1 TO 20 DO

ENDDO

LOOP FROM 1 TO 10 DO
ENDDO

IF Q497_NumofResidents <> THEN
|
| LOOP FROM 1 TO 80 DO
||
|| IF aArrayString{null} <> empty THEN
|||
||| **Q432A** HHMEM WRKG LCY
||| During [LAST CALENDAR YR CALCULATED], did [] do any work for pay?
||| 1 (YES) Yes
||| 5 (NO) No
|||
||| IF HHMEM WRKG LCY <> (NO) No and HHMEM WRKG LCY <> NONRESPONSE THEN
||||
|||| **Q433A** HHMEM EARNED AMOUNT - LCY {SE update 2/13/08}
|||| About how much money did [] earn from all jobs in [LAST CALENDAR YR CALCULATED], before
|||| taxes and other deductions? Do not include your job income or that of your spouse
|||| Range: 0..9999996
||||
|||| IF (HHMEM EARNED AMOUNT - LCY {SE update 2/13/08} > 0 and HHMEM EARNED AMOUNT -
LCY
|||| {SE update 2/13/08} < 1000) or HHMEM EARNED AMOUNT - LCY {SE update 2/13/08} > 50000
|||| THEN
|||||
||||| **checkQ433A** check Q433A
||||| You entered $[] Your answers are important to us. If this is incorrect, please go back
||||| and change your answer.
|||||
|||| ENDIF
||||
||| ENDIF
|||
|| ENDIF
||
| ENDDO
|
ENDIF

IF number of household members > THEN
|
| **Q437_** HHMEM NON JOB INCOME RECD AMOUNT
| Not including job income, about how much in total did other members of your family living with
| you receive in [LAST CALENDAR YR CALCULATED] from Social Security, pensions, welfare,
| interest, gifts, or anything else, (before taxes and other deductions)?
| Range: 0..9999996
|
| IF HHMEM NON JOB INCOME RECD AMOUNT > 1000000 THEN
||
|| **checkQ437** check Q437_

| | You entered $[] Your answers are important to us. If this is incorrect, please go back and
| | change your answer.
| |
| ENDIF
|
| **Q441_** HHMEM ASSETS
| Do other members of your family living there have more than $5,000 total in bank accounts,
| other financial assets, vehicles, property, or other investments? Do not include your assets
| or those of your spouse.
| 1 (YES) Yes
| 5 (NO) No
|
| IF HHMEM ASSETS <> (NO) No and HHMEM ASSETS <> NONRESPONSE THEN
| |
| | **Q442_** HHMEM ASSET AMOUNT
| | About how much altogether would that amount to, minus any debts (he/she/they) might have?
| | Range: 0..9999996
| |
| | IF (HHMEM ASSET AMOUNT > 0 and HHMEM ASSET AMOUNT < 5000) or HHMEM ASSET
AMOUNT >
| | 100000 THEN
| | |
| | | **checkQ442** check Q442_
| | | You entered $[] Your answers are important to us. If this is incorrect, please go back and
| | | change your answer.
| | |
| | ENDIF
| |
| ENDIF
|
ENDIF

Q446_ R OR SP FILE INCOME TAX RETURN - LCY
Did you [] [] file a federal income tax return form for [LAST CALENDAR YR CALCULATED]?
1 (YES) Yes
5 (NO) No

IF R OR SP FILE INCOME TAX RETURN - LCY <> (NO) No and R OR SP FILE INCOME TAX RETURN
- LCY
<> NONRESPONSE THEN
|
| **Q447_** R OR SP ITEMIZED DEDUCTIONS
| Did you [] [] itemize deductions on your [LAST CALENDAR YR CALCULATED] federal income tax,
| (such as property taxes, interest payments, medical expenses, and charitable contributions)?
| 1 (YES) Yes
| 5 (NO) No
| 6 (VOLDID_WILLNOTFILE) Did/will not file
|
| IF R OR SP ITEMIZED DEDUCTIONS <> (NO) No and R OR SP ITEMIZED DEDUCTIONS <>
| (VOLDID_WILLNOTFILE) Did/will not file and R OR SP ITEMIZED DEDUCTIONS <> NONRESPONSE
THEN
| |
| | **Q448_** ITEMIZED MEDICAL DEDUCTIONS

|| Were deductions itemized for medical expenses?
|| 1 (YES) Yes
|| 5 (NO) No
||
|| IF ITEMIZED MEDICAL DEDUCTIONS <> (NO) No and ITEMIZED MEDICAL DEDUCTIONS <> NONRESPONSE
|| THEN
|||
||| **Q449_** AMT ITEMIZED MEDICAL
||| How much did those expenses amount to in [LAST CALENDAR YR CALCULATED]?
||| Range: 0..9999996
|||
||| IF (AMT ITEMIZED MEDICAL > 0 and AMT ITEMIZED MEDICAL < 5000) or AMT ITEMIZED MEDICAL
||| > 10000 THEN
||||
|||| **checkQ449** check Q449_
|||| You entered $[] Your answers are important to us. If this is incorrect, please go back
|||| and change your answer.
||||
||| ENDIF
|||
|| ENDIF
||
| ENDIF
|
ENDIF

Q453_ WHETHER DONATE CHARITY
In [LAST CALENDAR YR CALCULATED], did you [] [] donate money, property, or possessions totalling
$500 or more to religious or other charitable organizations? (The United Way, the Heart
Association, educational institutions, religious organizations or other such groups are
charitable organizations.)
1 (YES) Yes
5 (NO) No

IF WHETHER DONATE CHARITY <> (NO) No and WHETHER DONATE CHARITY <> NONRESPONSE
THEN
|
| **Q454_** AMT DONATE CHARITY
| About how much money did that amount to?
| Range: 0..9999996
|
| IF (AMT DONATE CHARITY > 0 and AMT DONATE CHARITY < 500) or AMT DONATE CHARITY >
50000
| THEN
||
|| **checkQ454** check Q454_
|| You entered $[] Your answers are important to us. If this is incorrect, please go back and
|| change your answer.
||
| ENDIF
|

ENDIF

Q464_ PUT ANY ASSETS IN TRUST
Have you [] [] put any of your assets into a trust?
1 (YES) Yes
5 (NO) No

IF PUT ANY ASSETS IN TRUST <> (NO) No and PUT ANY ASSETS IN TRUST <> NONRESPONSE THEN
|
| LOOP FROM 1 TO 40 DO
| ENDDO
|
| LOOP FROM 1 TO 10 DO
| ENDDO
| **Q465M** WHO RCV TRUST BENEFITS - RELATION {SE update 2/13/08}
| Do you, or does someone else, receive the benefits of the assets you have put into a trust?
| Choose all that apply.
| 1 (RESPONDENT) Myself
| 2 (SPOUSE_PARTNER) [FL CODE S]
| 3 (CHILD_CHILDLAW_GRANDCHILD) [FL CODE S]
| 4 (OTHRELATIVE) Other relative
| 5 (SOMEONEELSE) Someone else
|
| IF (CHILD_CHILDLAW_GRANDCHILD in WHO RCV TRUST BENEFITS - RELATION {SE update 2/13/08}) THEN
||
|| LOOP FROM 1 TO 100 DO
|||
|| ENDDO
||
|| LOOP FROM 1 TO 40 DO
|||
||| IF (PERSON INFO CHANGED <> (DELETED) Deleted AND PERSON INFO CHANGED <> (DUPED)
||| Duplicated and FIRST NAME OF INDIVIDUAL <> empty) THEN
||||
|||| LOOP FROM 1 TO 40 DO
|||| ENDDO
||||
||| ENDIF
|||
||| IF RELATIONSHIP TO R-UPDATED = (SPPOFSON) Spouse/Partner of Son (Daughter-in-law) THEN
||||
|||| LOOP FROM 1 TO 40 DO
|||| ENDDO
||||
||| ENDIF
|||
||| IF RELATIONSHIP TO R-UPDATED = (UNKNOWNINLAW) Ambiguous child-in-law relationship THEN
||||
|||| LOOP FROM 1 TO 40 DO
|||| ENDDO

| | | |
| | | ENDIF
| |
| ENDDO
| **Q511_Q466M** WHICH CHILD TRUST - 2
| Which child is that? Choose all that apply
| 1 (C01) []
| 2 (C02) []
| 3 (C03) []
| 4 (C04) []
| 5 (C05) []
| 6 (C06) []
| 7 (C07) []
| 8 (C08) []
| 9 (C09) []
| 10 (C10) []
| 11 (C11) []
| 12 (C12) []
| 13 (C13) []
| 14 (C14) []
| 15 (C15) []
| 16 (C16) []
| 17 (C17) []
| 18 (C18) []
| 19 (C19) []
| 20 (C20) []
| 21 (C21) []
| 22 (C22) []
| 23 (C23) []
| 24 (C24) []
| 25 (C25) []
| 26 (C26) []
| 27 (C27) []
| 28 (C28) []
| 29 (C29) []
| 30 (C30) []
| 31 (C31) []
| 32 (C32) []
| 33 (C33) []
| 34 (C34) []
| 35 (C35) []
| 36 (C36) []
| 37 (C37) []
| 38 (C38) []
| 39 (C39) []
| 40 (C40) []
| 41 (C41) []
| 42 (C42) []
| 43 (C43) []
| 44 (C44) []
| 45 (C45) []
| 46 (C46) []
| 47 (C47) []

| 48 (C48) []
| 49 (C49) []
| 50 (C50) []
| 51 (C51) []
| 52 (C52) []
| 53 (C53) []
| 54 (C54) []
| 55 (C55) []
| 56 (C56) []
| 57 (C57) []
| 58 (C58) []
| 59 (C59) []
| 60 (C60) []
| 61 (C61) []
| 62 (C62) []
| 63 (C63) []
| 64 (C64) []
| 65 (C65) []
| 66 (C66) []
| 67 (C67) []
| 68 (C68) []
| 69 (C69) []
| 70 (C70) []
| 71 (C71) []
| 72 (C72) []
| 73 (C73) []
| 74 (C74) []
| 75 (C75) []
| 76 (C76) []
| 77 (C77) []
| 78 (C78) []
| 79 (C79) []
| 80 (C80) []
|
| IF WHICH CHILD TRUST - 2 <> NONRESPONSE THEN
| |
| | LOOP FROM 1 TO 50 DO
| | ENDDO
| |
|
| |
|
| |
| ENDIF
|
ENDIF

Q467_AmtTrust VALUE OF ANY TRUSTS
What about the value of any trusts? If you [][] [][] could sell all the assets you have put in
trusts, about how much would you have?
Range: 0..99999996

IF (VALUE OF ANY TRUSTS > 0 and VALUE OF ANY TRUSTS < 5000) or VALUE OF ANY TRUSTS >

1000000 THEN
|
| **checkQ467** check Q467_AmtTrust
| You entered $[] Your answers are important to us. If this is incorrect, please go back and
| change your answer.
|
ENDIF

Q471_ ALL OTHER ASSETS IN TRUSTS PREV REPORTED
Have you already told us about all of the investments and other assets that are included in the
trust?
1 (YES) Yes
5 (NO) No

IF ALL OTHER ASSETS IN TRUSTS PREV REPORTED = (NO) No THEN
|
| **Q472_** VALUE ASSETS NOT PREV REPORTED
| What is the value of the assets in the trust that you did NOT tell us about earlier?
| Range: 0..99999996
|
| IF VALUE ASSETS NOT PREV REPORTED > 1000000 THEN
| |
| | **checkQ472** check Q472_
| | You entered $[] Your answers are important to us. If this is incorrect, please go back and
| | change your answer.
| |
| ENDIF
|
ENDIF

Q476_ CHANGE TERMS OF TRUST
If you wanted to, could you change the terms of the trust?
1 (YES) Yes
5 (NO) No

ENDIF

Q477_ R OR SP ANY DEBTS NOT ASKED ABOUT BEFORE
And do you [] [] have any debts that we haven't asked about, such as credit card balances, medical
debts, life insurance policy loans, loans from relatives, and so forth? Do not include mortgages,
loans for cars or other vehicles, or money owed on other assets.
1 (YES) Yes
5 (NO) No

IF R OR SP ANY DEBTS NOT ASKED ABOUT BEFORE <> (NO) No and R OR SP ANY DEBTS NOT
ASKED ABOUT
BEFORE <> NONRESPONSE THEN

Q478_AmtDebt R OR SP DEBTS AMOUNT
Altogether, about how much would that amount to?
Range: 0..9999996

IF R OR SP DEBTS AMOUNT > 100000 THEN

|
| **checkQ478** check Q478_AmtDebt
| You entered $[] Your answers are important to us. If this is incorrect, please go back and
| change your answer.
|
ENDIF

Q517_ IF CREDIT CARD DEBT
Does any of that debt include credit card debt?
1 (YES) Yes
2 (YESALL) Yes, all of it
5 (NO) No

IF IF CREDIT CARD DEBT = (YES) Yes or IF CREDIT CARD DEBT = (YESALL) Yes, all of it THEN
|
| **Q518_** PD OFF CRED CARD LAST MO
| Last month did you [][] [][] pay off all your credit card debt or was there an unpaid debt
| that you carried over to this month?
| 1 (PAIDALL) Paid off all
| 5 (CARRIEDOVER) Carried over unpaid debt
|
| IF PD OFF CRED CARD LAST MO <> (PAIDALL) Paid off all THEN
||
|| **Q519_** CRED CARD DEBT CARRIED OVER
|| How much credit card debt did you [][] [][] carry over from last month to this one? We want
|| the total amount owed (not paid off), not the minimum payment.
|| Range: 0..9999996
||
|| IF CRED CARD DEBT CARRIED OVER > 100000 THEN
|||
||| **checkQ519** check Q519_
||| You entered $[] Your answers are important to us. If this is incorrect, please go back and
||| change your answer.
|||
|| ENDIF
||
| ENDIF
|
ENDIF

ENDIF

LOOP FROM 1 TO 3 DO

IF CNT3 = 1 or R OR SP IF LUMP SUM RECEIVED {SE update 2/13/08} = (YES) Yes THEN
|
| **Q483A** R OR SP IF LUMP SUM RECEIVED {SE update 2/13/08}
| [] [] received []_2 'Large' = $10,000 or more
| 1 (YES) Yes
| 5 (NO) No
|
| IF R OR SP IF LUMP SUM RECEIVED {SE update 2/13/08} <> (NO) No and R OR SP IF LUMP SUM
| RECEIVED {SE update 2/13/08} <> NONRESPONSE THEN

||
|| **Q484A** LUMP SUM IN WHAT FORM {SE update 2/13/08}
|| What was the [] largest lump sum -- was it from an inheritance, a trust, an insurance
|| settlement, or what?
|| 1 (INSSETTLEMENT) Insurance settlement
|| 2 (PENSIONSETTLEMENT) Pension settlement
|| 3 (INHERITANCE_ORTRUST) Inheritance (or trust)
|| 4 (GIFT) Gift
|| 5 (LAWSUIT) Lawsuit
|| 7 (OTHER_SPECIFY) Other (specify)
||
|| IF LUMP SUM IN WHAT FORM {SE update 2/13/08} = (OTHER_SPECIFY) Other (specify) THEN
|||
||| **Q485S** R/H/W/P EVER REC ANY LUMP SUM - SPECIFY
||| (What was the [] largest lump sum -- was it from an inheritance, a trust, an insurance
||| settlement, or what?) Other (Specify):
||| Memo
|||
|| ENDIF
||
|| **Q487A** YEAR LUMP SUM RECEIVED {SE update 2/13/08}
|| In what year did you [] [] receive that [LUMP SUM IN WHAT FORM {SE update 2/13/08}]?
|| Range: 1900..2009
||
|| IF YEAR LUMP SUM RECEIVED {SE update 2/13/08} > current date year THEN
|||
||| **checkEnteredYearGreater** YEAR ENTERED IS GREATER THAN CURRENT YEAR
||| The year you entered is greater than today. Please go back and correct your answer.
|||
|| ENDIF
||
|| IF YEAR LUMP SUM RECEIVED {SE update 2/13/08} > TWO YEARS AGO or YEAR LUMP SUM RECEIVED
|| {SE update 2/13/08} = TWO YEARS AGO THEN
|||
||| **Q486A** MONTH LUMP SUM RECEIVED {SE update 2/13/08}
||| In what month did you [] [] receive that [LUMP SUM IN WHAT FORM {SE update 2/13/08}]?
||| 1 (JAN) January
||| 2 (FEB) February
||| 3 (MAR) March
||| 4 (APR) April
||| 5 (MAY) May
||| 6 (JUN) June
||| 7 (JUL) July
||| 8 (AUG) August
||| 9 (SEP) September
||| 10 (OCT) October
||| 11 (NOV) November
||| 12 (DEC) December
|||
|| ENDIF
||
|| **Q488A** LUMP SUM AMOUNT RECEIVED {SE update 2/13/08}

|| About how much did you [] [] receive from the[LUMP SUM IN WHAT FORM {SE update 2/13/08}]?
|| Range: 0..9999996
||
|| IF (LUMP SUM AMOUNT RECEIVED {SE update 2/13/08} > 0 and LUMP SUM AMOUNT RECEIVED {SE
|| update 2/13/08} < 5000) or LUMP SUM AMOUNT RECEIVED {SE update 2/13/08} > 250000 THEN
|||
||| **checkQ488A** check Q488A
||| You entered $[] Your answers are important to us. If this is incorrect, please go back and
||| change your answer.
|||
|| ENDIF
||
|| IF LUMP SUM AMOUNT RECEIVED {SE update 2/13/08} = NONRESPONSE THEN
|||
||| **Q489A** LUMP SUM AMT - $50K {SE update 2/13/08}
||| Did it amount to less than $50,000, more than $50,000, or what?
||| 1 (LESSTHAN50000) Less than $50,000
||| 3 (ABT50000) About $50,000
||| 5 (MORETHAN50000) More than $50,000
|||
|| ENDIF
||
|| IF LUMP SUM IN WHAT FORM {SE update 2/13/08} = (INHERITANCE_ORTRUST) Inheritance (or
|| trust) THEN
|||
||| **Q490A** LUMP SUM - WHO FROM {SE update 2/13/08}
||| From whom was that (inheritance/trust) received, that is, what is their relationship to
||| you?
||| 14 (RPARENTS) Parents
||| 15 (BROTHER) Brother
||| 17 (SISTER) Sister
||| 19 (OTHERRELATIVE) Other relative
||| 20 (OTHERINDIVIDUAL) Other individual
||| 27 (EXSPOUSE_PARTNER) Ex-spouse/partner
||| 34 (SPPARENTS) Spouse's parents
|||
|| ENDIF
||
| ENDIF
|
ENDIF

ENDDO

Q493_Qassist ASSIST SECTION Q
How often did you receive assistance with answers in this survey?
1 (NEVER) Never
2 (AFEWTIMES) A few times
3 (MOSTORALLOFTHETIME) Most or all of the time

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.
Memo