IF SEX OF INDIVIDUAL-UPDATED = EMPTY THEN

<table>
<thead>
<tr>
<th>Respondents1X060ASex</th>
<th>SEX OF INDIVIDUAL-UPDATED</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is your sex?</td>
<td></td>
</tr>
<tr>
<td>1 (MALE) Male</td>
<td></td>
</tr>
<tr>
<td>2 (FEMALE) Female</td>
<td></td>
</tr>
</tbody>
</table>

ENDIF

IF FIRST NAME OF INDIVIDUAL = EMPTY THEN

<table>
<thead>
<tr>
<th>Respondents1X058AFName</th>
<th>FIRST NAME OF INDIVIDUAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is your first name?</td>
<td></td>
</tr>
<tr>
<td>String</td>
<td></td>
</tr>
</tbody>
</table>

ENDIF

IF COUPLENESS STATUS OF INDIVIDUAL = EMPTY THEN

<table>
<thead>
<tr>
<th>Respondents1X065ACouplenss</th>
<th>COUPLENESS STATUS OF INDIVIDUAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are you married or living with a partner?</td>
<td></td>
</tr>
<tr>
<td>1 (MARRIED) Married</td>
<td></td>
</tr>
<tr>
<td>2 (REMARRIED) Remarried</td>
<td></td>
</tr>
<tr>
<td>3 (PARTNERED_VOL) Partnered</td>
<td></td>
</tr>
<tr>
<td>4 (REPARTNERED_VOL) Repartnered</td>
<td></td>
</tr>
<tr>
<td>5 (OTHER) Other</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Q010_RSPWRKPAYLCY</th>
<th>R OR SP WORK FOR PAY - LCY</th>
</tr>
</thead>
</table>
| 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_WoWrkPayLCY 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

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
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_RCCVTIPLCY 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.
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 EML 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 EML 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

Q064_RCVUNEMPLCY 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 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 >
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

|
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

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

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
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?
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

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

check Entered Year Greater 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?
IF ( COUPLENESS STATUS OF INDIVIDUAL = (MARRIED) Married or COUPLENESS STATUS OF INDIVIDUAL = (PARTNERED_VOL) Partnered ) and ( WHO RECEIVES VET BEN MILITARY PENSION <> RESPONDENTONLY ) 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

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

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 |
For how long will these annuity payments continue?

Range: 2007..2100

Until age rec annuity from other IRA {SE update 2/13/08}

Range: 30..115

How long annuity payments continue

Range: 0..96

Year rec annuity from other IRA

Until randspbthdie) Until R and spouse both die
Until r dies
Until spouse dies
Until money runs out
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
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
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 how long annuity payments continue}
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.

Q203S  H/LONG REC ANNU FROM OTH IRA - SPECIFY
(For how long will these annuity payments continue?) Other (Specify):
Memo

Q204_  AMT WITHDRAWN FROM OTHER IRA
About how much money was withdrawn?
Range: 0..99999996

checkQ204  check Q204_
You entered $[] Your answers are important to us. If this is incorrect, please go back and
change your answer.

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)

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
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
Q217_ R INCOME FR MORE THAN ONE PENSION
[] Do you[.] receive income from more than one retirement pension?
1 (YES) Yes
5 (NO) No

Q218_ NUMBER OF PENSIONS R RECEIVED
How many retirement pensions do you receive?
| Range: 0..50

Q220A R AMT RECV FR PENSION LAST MONTH {SE update 2/13/08}
[] How much did you receive last month from [.] pension, (before taxes and other
deductions)?
| Range: 0..9999996

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
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
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 (CONTINUEATREDCEDLEVEL) 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  
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.

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
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
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
You wrote that you receive \[\text{R NUMBER OF ANNUITIES INCOME}\] annuities. Your answers are important to us. If this is incorrect, please go back and change your answer.

ENDIF

ENDIF

IF \(\text{R NUMBER OF ANNUITIES INCOME} > 0\) and \(\text{R NUMBER OF ANNUITIES INCOME} \neq \text{NONRESPONSE}\) THEN

LOOP FROM 1 TO 2 DO

IF \(\text{I} < \text{R NUMBER OF ANNUITIES INCOME}\) or \(\text{I} = \text{R NUMBER OF ANNUITIES INCOME}\) THEN

\[\text{Q278AAnnuityIncLMO} \quad \text{R AMT FROM ANNUITY - LAST MONTH} \quad \text{(SE update 2/13/08)}\]

[] How much did you receive last month from [], (before taxes and other deductions)?

Range: 0..9999996

IF ( \(\text{R AMT FROM ANNUITY - LAST MONTH} \quad \text{(SE update 2/13/08)} > 0\) and \(\text{R AMT FROM ANNUITY - LAST MONTH} \quad \text{(SE update 2/13/08)} < 250\)) and \(\text{R AMT FROM ANNUITY - LAST MONTH} \quad \text{(SE update 2/13/08)} > 10000\) THEN

\[\text{checkQ278A} \quad \text{check Q278AAnnuityIncLMO}\]

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

ENDIF

IF \(\text{R AMT FROM ANNUITY - LAST MONTH} \quad \text{(SE update 2/13/08)} \neq 0\) or \(\text{R AMT FROM ANNUITY - LAST MONTH} \quad \text{(SE update 2/13/08)} = \text{NONRESPONSE}\) THEN

\[\text{Q282A} \quad \text{R TAXES WITHHELD FROM ANNUITY PMT} \quad \text{(SE update 2/13/08)}\]

Were any federal income taxes withheld on that?

1 (YES) Yes

5 (NO) No

\[\text{Q283A} \quad \text{R YEAR ANNUITY PMT STARTED} \quad \text{(SE update 2/13/08)}\]

In what year did you start to receive that annuity payment?

Range: 1900..2009

IF \(\text{R YEAR ANNUITY PMT STARTED} \quad \text{(SE update 2/13/08)} > \text{current date year}\) THEN

\[\text{checkEnteredYearGreater} \quad \text{YEAR ENTERED IS GREATER THAN CURRENT YEAR}\]

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

ENDIF

IF \(\text{R YEAR ANNUITY PMT STARTED} \quad \text{(SE update 2/13/08)} = \text{TWO YEARS AGO}\) or \(\text{R YEAR ANNUITY PMT STARTED} \quad \text{(SE update 2/13/08)} > \text{TWO YEARS AGO}\) 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
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
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
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
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..99999999

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 PERIOD
Do you [] get about the same amount each payment?
1 (YES) Yes
5 (NO) No

ENDIF

ENDIF

IF BOND INCOME AMOUNT SAME 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..99999996

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 THEN

ENDIF

ENDIF

ENDIF
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?
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

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

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..99999996

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 |
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


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):

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_SplInNHome= 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 |

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

| 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
|
ENDDO

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 > 100000 THEN
|
|
|checkQ437 check Q437_
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

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

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
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
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)
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..99999999

IF ( VALUE OF ANY TRUSTS > 0 and VALUE OF ANY TRUSTS < 5000 ) or VALUE OF ANY TRUSTS >
1000000 THEN

<table>
<thead>
<tr>
<th>checkQ467</th>
<th>check Q467_AmtTrust</th>
</tr>
</thead>
<tbody>
<tr>
<td>You entered $[] Your answers are important to us. If this is incorrect, please go back and change your answer.</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Q472_ VALUE ASSETS NOT PREV REPORTED</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the value of the assets in the trust that you did NOT tell us about earlier?</td>
</tr>
<tr>
<td>Range: 0..99999996</td>
</tr>
</tbody>
</table>

IF VALUE ASSETS NOT PREV REPORTED > 1000000 THEN

<table>
<thead>
<tr>
<th>checkQ472</th>
<th>check Q472_</th>
</tr>
</thead>
<tbody>
<tr>
<td>You entered $[] Your answers are important to us. If this is incorrect, please go back and change your answer.</td>
<td></td>
</tr>
</tbody>
</table>

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..99999996

IF R OR SP DEBTS AMOUNT > 100000 THEN
**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? (Range: 0..9999996)

IF (LUMP SUM AMOUNT RECEIVED > 0 and LUMP SUM AMOUNT RECEIVED < 5000) or LUMP SUM AMOUNT RECEIVED > 250000 THEN

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 = NONRESPONSE THEN

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 = (INHERITANCE_ORTRUST) Inheritance (or trust) THEN

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 (SParents) Spouse's parents

ENDIF

ENDIF

ENDDO

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

How pleasant was the 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