

Well Being 470

[The following questions are displayed as a table]

Q1_intro actual life timeline intro

Your Life Timeline We would like to learn about your experience with some common life events. Please select below at what age you first experienced each event. If you have not experienced this event, please select N/A.

Q1a Finish high school

Finish high school

888 N/A

15 15 or younger

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100 100 or older

Q1b Start college

Start college

888 N/A

15 15 or younger

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100 100 or older

Q1c Finish college

Finish college

888 N/A

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100 100 or older

Q1d Move out on own

Move out on own (e.g., rent first apartment)

888 N/A

15 15 or younger

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100 100 or older

Q1e Start full-time job

Start full-time job

888 N/A

15 15 or younger

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100 100 or older

Q1f Live with a partner/significant other

Live with a partner/significant other

888 N/A

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100 100 or older

Q1g Get married

Get married

888 N/A

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100 100 or older

Q1h Start a family
Start a family (e.g., have a child)

888 N/A

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100 100 or older

Q1i Buy a home

Buy a home

888 N/A

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100 100 or older

Q1j Begin a long-term career

Begin a long-term career

888 N/A

15 15 or younger

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100 100 or older

Q1k Take out student loans

Take out student loans

888 N/A

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100 100 or older

Q11 Pay off all student loans

Pay off all student loans

888 N/A

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100 100 or older

Q1m Start saving for retirement

Start saving for retirement

888 N/A

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100 100 or older

Q1n Retire

Retire (stop working for pay)

888 N/A

15 15 or younger

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100 100 or older

[End of table display]

[The following questions are displayed as a table]

Q2_intro ideal life timeline intro

Your Ideal Life Timeline Next, we want learn about your ideal life timeline. For events you have already experienced: think back to before you experienced the event, and select the age when you would ideally have liked to experience the event. For events you haven't experienced: select when you ideally want to experience the event. If you don't want to experience the event, select N/A.

Q2a Finish high school

Finish high school

888 N/A

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100 100 or older

Q2b Start college

Start college

888 N/A

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100 100 or older

Q2c Finish college

Finish college

888 N/A

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100 100 or older

Q2d Move out on own

Move out on own (e.g., rent first apartment)

888 N/A

15 15 or younger

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100 100 or older

Q2e Start full-time job

Start full-time job

888 N/A

15 15 or younger

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100 100 or older

Q2f Live with a partner/significant other

Live with a partner/significant other

888 N/A

15 15 or younger

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100 100 or older

Q2g Get married

Get married

888 N/A

15 15 or younger

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100 100 or older

Q2h Start a family
Start a family (e.g., have a child)
888 N/A

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97 97
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99 99
100 100 or older

Q2i Buy a home

Buy a home

888 N/A

15 15 or younger

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99 99
100 100 or older

Q2j Begin a long-term career

Begin a long-term career

888 N/A

15 15 or younger

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99 99
100 100 or older

Q2k Take out student loans

Take out student loans

888 N/A

15 15 or younger

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100 100 or older

Q21 Pay off all student loans

Pay off all student loans

888 N/A

15 15 or younger

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99 99
100 100 or older

Q2m Start saving for retirement

Start saving for retirement

888 N/A

15 15 or younger

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24 24

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99 99
100 100 or older

Q2n Retire

Retire (stop working for pay)

888 N/A

15 15 or younger

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100 100 or older

[End of table display]

[The following questions are displayed as a table]

Q4 Life Timeline follow-up

Overall, how do you think the timing of your life events compares to that of the typical American?

- 1 Much earlier
- 2 Somewhat earlier
- 3 About the same time
- 4 Somewhat later
- 5 Much later

[End of table display]

Q33 years expect to live in first home

How many years do you expect to live in your first home?

Range: 0..100

Q34 years expect to work at current job

How many years do you expect to work at your current job?

Range: 0..100

Q35 years expect to live where currently reside

How many years do you expect to live in the city or town where you currently reside?

Range: 0..100

Q36 age expect to retire

At what age do you expect to retire?

Range: 0..100

Q37 years expect to live

How many years do you expect to live?

Range: 0..150

[The following questions are displayed as a table]

Q5_intro Financial decisions responsible intro

In general, to what extent are you responsible for decisions about the following?

Q5a Tax return preparation

Tax return preparation

- 1 I am the sole decision maker
- 2 Someone else helps me, but I make most of the decisions
- 3 I make these decisions with someone else
- 4 I help out, but someone else makes most of these decisions
- 5 Someone else is the sole decision maker
- 777 I don't know
- 888 N/A

Q5b Health insurance coverage

Health insurance coverage

- 1 I am the sole decision maker
- 2 Someone else helps me, but I make most of the decisions
- 3 I make these decisions with someone else
- 4 I help out, but someone else makes most of these decisions
- 5 Someone else is the sole decision maker
- 777 I don't know
- 888 N/A

Q5c Car purchase

Car purchase

- 1 I am the sole decision maker
- 2 Someone else helps me, but I make most of the decisions
- 3 I make these decisions with someone else
- 4 I help out, but someone else makes most of these decisions
- 5 Someone else is the sole decision maker
- 777 I don't know
- 888 N/A

Q5d Retirement plan

Retirement plan

- 1 I am the sole decision maker
- 2 Someone else helps me, but I make most of the decisions
- 3 I make these decisions with someone else
- 4 I help out, but someone else makes most of these decisions
- 5 Someone else is the sole decision maker
- 777 I don't know
- 888 N/A

Q5e Home/apartment search

Home/apartment search

- 1 I am the sole decision maker
- 2 Someone else helps me, but I make most of the decisions
- 3 I make these decisions with someone else
- 4 I help out, but someone else makes most of these decisions
- 5 Someone else is the sole decision maker
- 777 I don't know
- 888 N/A

Q5f Home appliance purchase

Home appliance purchase

- 1 I am the sole decision maker
- 2 Someone else helps me, but I make most of the decisions
- 3 I make these decisions with someone else
- 4 I help out, but someone else makes most of these decisions
- 5 Someone else is the sole decision maker

777 I don't know
888 N/A

Q5g Student loans

Student loans

- 1 I am the sole decision maker
 - 2 Someone else helps me, but I make most of the decisions
 - 3 I make these decisions with someone else
 - 4 I help out, but someone else makes most of these decisions
 - 5 Someone else is the sole decision maker
- 777 I don't know
888 N/A

Q5h Home loans

Home loans (e.g., mortgage or home equity)

- 1 I am the sole decision maker
 - 2 Someone else helps me, but I make most of the decisions
 - 3 I make these decisions with someone else
 - 4 I help out, but someone else makes most of these decisions
 - 5 Someone else is the sole decision maker
- 777 I don't know
888 N/A

Q5i Auto loans

Auto loans

- 1 I am the sole decision maker
 - 2 Someone else helps me, but I make most of the decisions
 - 3 I make these decisions with someone else
 - 4 I help out, but someone else makes most of these decisions
 - 5 Someone else is the sole decision maker
- 777 I don't know
888 N/A

Q5j Investing

Investing (e.g., stocks or life insurance)

- 1 I am the sole decision maker
 - 2 Someone else helps me, but I make most of the decisions
 - 3 I make these decisions with someone else
 - 4 I help out, but someone else makes most of these decisions
 - 5 Someone else is the sole decision maker
- 777 I don't know
888 N/A

Q5k Utility bill payment

Utility bill payment (e.g., internet or water)

- 1 I am the sole decision maker
 - 2 Someone else helps me, but I make most of the decisions
 - 3 I make these decisions with someone else
 - 4 I help out, but someone else makes most of these decisions
 - 5 Someone else is the sole decision maker
- 777 I don't know
888 N/A

Q5l Home repairs

Home repairs

- 1 I am the sole decision maker

2 Someone else helps me, but I make most of the decisions
3 I make these decisions with someone else
4 I help out, but someone else makes most of these decisions
5 Someone else is the sole decision maker
777 I don't know
888 N/A

Q5m Childcare

Childcare (e.g., daycare, preschool, babysitter)

1 I am the sole decision maker
2 Someone else helps me, but I make most of the decisions
3 I make these decisions with someone else
4 I help out, but someone else makes most of these decisions
5 Someone else is the sole decision maker
777 I don't know
888 N/A

Q5n Auto insurance

Auto insurance

1 I am the sole decision maker
2 Someone else helps me, but I make most of the decisions
3 I make these decisions with someone else
4 I help out, but someone else makes most of these decisions
5 Someone else is the sole decision maker
777 I don't know
888 N/A

Q5o Managing household budget

Managing household budget

1 I am the sole decision maker
2 Someone else helps me, but I make most of the decisions
3 I make these decisions with someone else
4 I help out, but someone else makes most of these decisions
5 Someone else is the sole decision maker
777 I don't know
888 N/A

Q5p Grocery purchases

Grocery purchases

1 I am the sole decision maker
2 Someone else helps me, but I make most of the decisions
3 I make these decisions with someone else
4 I help out, but someone else makes most of these decisions
5 Someone else is the sole decision maker
777 I don't know
888 N/A

[End of table display]

[The following questions are displayed as a table]

Q38_intro Financial decisions confidence intro

In general, to what extent do you feel confident about being the sole decision maker for each of the following?

Q38a Tax return preparation

Tax return preparation

1 Not at all confident
2 A little confident
3 Somewhat confident
4 Very confident
5 Extremely confident
777 I don't know
888 N/A

Q38b Health insurance coverage

Health insurance coverage

1 Not at all confident
2 A little confident
3 Somewhat confident
4 Very confident
5 Extremely confident
777 I don't know
888 N/A

Q38c Car purchase

Car purchase

1 Not at all confident
2 A little confident
3 Somewhat confident
4 Very confident
5 Extremely confident
777 I don't know
888 N/A

Q38d Retirement plan

Retirement plan

1 Not at all confident
2 A little confident
3 Somewhat confident
4 Very confident
5 Extremely confident
777 I don't know
888 N/A

Q38e Home/apartment search

Home/apartment search

1 Not at all confident
2 A little confident
3 Somewhat confident
4 Very confident
5 Extremely confident
777 I don't know
888 N/A

Q38f Home appliance purchase

Home appliance purchase

1 Not at all confident
2 A little confident
3 Somewhat confident
4 Very confident
5 Extremely confident
777 I don't know

888 N/A

Q38g Student loans

Student loans

- 1 Not at all confident
- 2 A little confident
- 3 Somewhat confident
- 4 Very confident
- 5 Extremely confident
- 777 I don't know
- 888 N/A

Q38h Home loans

Home loans (e.g., mortgage or home equity)

- 1 Not at all confident
- 2 A little confident
- 3 Somewhat confident
- 4 Very confident
- 5 Extremely confident
- 777 I don't know
- 888 N/A

Q38i Auto loans

Auto loans

- 1 Not at all confident
- 2 A little confident
- 3 Somewhat confident
- 4 Very confident
- 5 Extremely confident
- 777 I don't know
- 888 N/A

Q38j Investing

Investing (e.g., stocks or life insurance)

- 1 Not at all confident
- 2 A little confident
- 3 Somewhat confident
- 4 Very confident
- 5 Extremely confident
- 777 I don't know
- 888 N/A

Q38k Utility bill payment

Utility bill payment (e.g., internet or water)

- 1 Not at all confident
- 2 A little confident
- 3 Somewhat confident
- 4 Very confident
- 5 Extremely confident
- 777 I don't know
- 888 N/A

Q38l Home repairs

Home repairs

- 1 Not at all confident
- 2 A little confident

3 Somewhat confident
4 Very confident
5 Extremely confident
777 I don't know
888 N/A

Q38m Childcare

Childcare (e.g., daycare, preschool, babysitter)

1 Not at all confident
2 A little confident
3 Somewhat confident
4 Very confident
5 Extremely confident
777 I don't know
888 N/A

Q38n Auto insurance

Auto insurance

1 Not at all confident
2 A little confident
3 Somewhat confident
4 Very confident
5 Extremely confident
777 I don't know
888 N/A

Q38o Managing household budget

Managing household budget

1 Not at all confident
2 A little confident
3 Somewhat confident
4 Very confident
5 Extremely confident
777 I don't know
888 N/A

Q38p Grocery purchases

Grocery purchases

1 Not at all confident
2 A little confident
3 Somewhat confident
4 Very confident
5 Extremely confident
777 I don't know
888 N/A

[End of table display]

[The following questions are displayed as a table]

Q6_intro financial decisions happy intro

How positive or negative do you feel when you think about making decisions regarding each of the following?

Q6a Tax return preparation

Tax return preparation

1 Extremely positive
2 Moderately positive

- 3 Slightly positive
- 4 Neither positive nor negative
- 5 Slightly negative
- 6 Moderately negative
- 7 Extremely negative

Q6b Health insurance coverage

Health insurance coverage

- 1 Extremely positive
- 2 Moderately positive
- 3 Slightly positive
- 4 Neither positive nor negative
- 5 Slightly negative
- 6 Moderately negative
- 7 Extremely negative

Q6c Car purchase

Car purchase

- 1 Extremely positive
- 2 Moderately positive
- 3 Slightly positive
- 4 Neither positive nor negative
- 5 Slightly negative
- 6 Moderately negative
- 7 Extremely negative

Q6d Retirement plan

Retirement plan

- 1 Extremely positive
- 2 Moderately positive
- 3 Slightly positive
- 4 Neither positive nor negative
- 5 Slightly negative
- 6 Moderately negative
- 7 Extremely negative

Q6e Home/apartment search

Home/apartment search

- 1 Extremely positive
- 2 Moderately positive
- 3 Slightly positive
- 4 Neither positive nor negative
- 5 Slightly negative
- 6 Moderately negative
- 7 Extremely negative

Q6f Home appliance purchase

Home appliance purchase

- 1 Extremely positive
- 2 Moderately positive
- 3 Slightly positive
- 4 Neither positive nor negative
- 5 Slightly negative
- 6 Moderately negative
- 7 Extremely negative

Q6g Student loans

Student loans

- 1 Extremely positive
- 2 Moderately positive
- 3 Slightly positive
- 4 Neither positive nor negative
- 5 Slightly negative
- 6 Moderately negative
- 7 Extremely negative

Q6h Home loans

Home loans (e.g., mortgage or home equity)

- 1 Extremely positive
- 2 Moderately positive
- 3 Slightly positive
- 4 Neither positive nor negative
- 5 Slightly negative
- 6 Moderately negative
- 7 Extremely negative

Q6i Auto loans

Auto loans

- 1 Extremely positive
- 2 Moderately positive
- 3 Slightly positive
- 4 Neither positive nor negative
- 5 Slightly negative
- 6 Moderately negative
- 7 Extremely negative

Q6j Investing

Investing (e.g., stocks or life insurance)

- 1 Extremely positive
- 2 Moderately positive
- 3 Slightly positive
- 4 Neither positive nor negative
- 5 Slightly negative
- 6 Moderately negative
- 7 Extremely negative

Q6k Utility bill payment

Utility bill payment (e.g., internet or water)

- 1 Extremely positive
- 2 Moderately positive
- 3 Slightly positive
- 4 Neither positive nor negative
- 5 Slightly negative
- 6 Moderately negative
- 7 Extremely negative

Q6l Home repairs

Home repairs

- 1 Extremely positive
- 2 Moderately positive
- 3 Slightly positive
- 4 Neither positive nor negative

- 5 Slightly negative
- 6 Moderately negative
- 7 Extremely negative

Q6m Childcare

Childcare (e.g., daycare, preschool, babysitter)

- 1 Extremely positive
- 2 Moderately positive
- 3 Slightly positive
- 4 Neither positive nor negative
- 5 Slightly negative
- 6 Moderately negative
- 7 Extremely negative

Q6n Auto insurance

Auto insurance

- 1 Extremely positive
- 2 Moderately positive
- 3 Slightly positive
- 4 Neither positive nor negative
- 5 Slightly negative
- 6 Moderately negative
- 7 Extremely negative

Q6o Managing household budget

Managing household budget

- 1 Extremely positive
- 2 Moderately positive
- 3 Slightly positive
- 4 Neither positive nor negative
- 5 Slightly negative
- 6 Moderately negative
- 7 Extremely negative

Q6p Grocery purchases

Grocery purchases

- 1 Extremely positive
- 2 Moderately positive
- 3 Slightly positive
- 4 Neither positive nor negative
- 5 Slightly negative
- 6 Moderately negative
- 7 Extremely negative

[End of table display]

[The following questions are displayed as a table]

Q7_intro financial decisions anxious intro

How anxious or calm do you feel when you think about making decisions regarding each of the following?

Q7a Tax return preparation

Tax return preparation

- 1 Extremely anxious
- 2 Moderately anxious
- 3 Slightly anxious
- 4 Neither anxious nor calm

- 5 Slightly calm
- 6 Moderately calm
- 7 Extremely calm

Q7b Health insurance coverage

Health insurance coverage

- 1 Extremely anxious
- 2 Moderately anxious
- 3 Slightly anxious
- 4 Neither anxious nor calm
- 5 Slightly calm
- 6 Moderately calm
- 7 Extremely calm

Q7c Car purchase

Car purchase

- 1 Extremely anxious
- 2 Moderately anxious
- 3 Slightly anxious
- 4 Neither anxious nor calm
- 5 Slightly calm
- 6 Moderately calm
- 7 Extremely calm

Q7d Retirement plan

Retirement plan

- 1 Extremely anxious
- 2 Moderately anxious
- 3 Slightly anxious
- 4 Neither anxious nor calm
- 5 Slightly calm
- 6 Moderately calm
- 7 Extremely calm

Q7e Home/apartment search

Home/apartment search

- 1 Extremely anxious
- 2 Moderately anxious
- 3 Slightly anxious
- 4 Neither anxious nor calm
- 5 Slightly calm
- 6 Moderately calm
- 7 Extremely calm

Q7f Home appliance purchase

Home appliance purchase

- 1 Extremely anxious
- 2 Moderately anxious
- 3 Slightly anxious
- 4 Neither anxious nor calm
- 5 Slightly calm
- 6 Moderately calm
- 7 Extremely calm

Q7g Student loans

Student loans

- 1 Extremely anxious
- 2 Moderately anxious
- 3 Slightly anxious
- 4 Neither anxious nor calm
- 5 Slightly calm
- 6 Moderately calm
- 7 Extremely calm

Q7h Home loans

Home loans (e.g., mortgage or home equity)

- 1 Extremely anxious
- 2 Moderately anxious
- 3 Slightly anxious
- 4 Neither anxious nor calm
- 5 Slightly calm
- 6 Moderately calm
- 7 Extremely calm

Q7i Auto loans

Auto loans

- 1 Extremely anxious
- 2 Moderately anxious
- 3 Slightly anxious
- 4 Neither anxious nor calm
- 5 Slightly calm
- 6 Moderately calm
- 7 Extremely calm

Q7j Investing

Investing (e.g., stocks or life insurance)

- 1 Extremely anxious
- 2 Moderately anxious
- 3 Slightly anxious
- 4 Neither anxious nor calm
- 5 Slightly calm
- 6 Moderately calm
- 7 Extremely calm

Q7k Utility bill payment

Utility bill payment (e.g., internet or water)

- 1 Extremely anxious
- 2 Moderately anxious
- 3 Slightly anxious
- 4 Neither anxious nor calm
- 5 Slightly calm
- 6 Moderately calm
- 7 Extremely calm

Q7l Home repairs

Home repairs

- 1 Extremely anxious
- 2 Moderately anxious
- 3 Slightly anxious
- 4 Neither anxious nor calm
- 5 Slightly calm
- 6 Moderately calm

7 Extremely calm

Q7m Childcare

Childcare (e.g., daycare, preschool, babysitter)

- 1 Extremely anxious
- 2 Moderately anxious
- 3 Slightly anxious
- 4 Neither anxious nor calm
- 5 Slightly calm
- 6 Moderately calm
- 7 Extremely calm

Q7n Auto insurance

Auto insurance

- 1 Extremely anxious
- 2 Moderately anxious
- 3 Slightly anxious
- 4 Neither anxious nor calm
- 5 Slightly calm
- 6 Moderately calm
- 7 Extremely calm

Q7o Managing household budget

Managing household budget

- 1 Extremely anxious
- 2 Moderately anxious
- 3 Slightly anxious
- 4 Neither anxious nor calm
- 5 Slightly calm
- 6 Moderately calm
- 7 Extremely calm

Q7p Grocery purchases

Grocery purchases

- 1 Extremely anxious
- 2 Moderately anxious
- 3 Slightly anxious
- 4 Neither anxious nor calm
- 5 Slightly calm
- 6 Moderately calm
- 7 Extremely calm

[End of table display]

[The following questions are displayed as a table]

Q8_intro financial decisions bored intro

How bored or excited do you feel when you think about making decisions regarding each of the following?

Q8a Tax return preparation

Tax return preparation

- 1 Extremely bored
- 2 Moderately bored
- 3 Slightly bored
- 4 Neither bored nor excited
- 5 Slightly excited
- 6 Moderately excited

7 Extremely excited

Q8b Health insurance coverage

Health insurance coverage

- 1 Extremely bored
- 2 Moderately bored
- 3 Slightly bored
- 4 Neither bored nor excited
- 5 Slightly excited
- 6 Moderately excited
- 7 Extremely excited

Q8c Car purchase

Car purchase

- 1 Extremely bored
- 2 Moderately bored
- 3 Slightly bored
- 4 Neither bored nor excited
- 5 Slightly excited
- 6 Moderately excited
- 7 Extremely excited

Q8d Retirement plan

Retirement plan

- 1 Extremely bored
- 2 Moderately bored
- 3 Slightly bored
- 4 Neither bored nor excited
- 5 Slightly excited
- 6 Moderately excited
- 7 Extremely excited

Q8e Home/apartment search

Home/apartment search

- 1 Extremely bored
- 2 Moderately bored
- 3 Slightly bored
- 4 Neither bored nor excited
- 5 Slightly excited
- 6 Moderately excited
- 7 Extremely excited

Q8f Home appliance purchase

Home appliance purchase

- 1 Extremely bored
- 2 Moderately bored
- 3 Slightly bored
- 4 Neither bored nor excited
- 5 Slightly excited
- 6 Moderately excited
- 7 Extremely excited

Q8g Student loans

Student loans

- 1 Extremely bored
- 2 Moderately bored

- 3 Slightly bored
- 4 Neither bored nor excited
- 5 Slightly excited
- 6 Moderately excited
- 7 Extremely excited

Q8h Home loans

Home loans (e.g., mortgage or home equity)

- 1 Extremely bored
- 2 Moderately bored
- 3 Slightly bored
- 4 Neither bored nor excited
- 5 Slightly excited
- 6 Moderately excited
- 7 Extremely excited

Q8i Auto loans

Auto loans

- 1 Extremely bored
- 2 Moderately bored
- 3 Slightly bored
- 4 Neither bored nor excited
- 5 Slightly excited
- 6 Moderately excited
- 7 Extremely excited

Q8j Investing

Investing (e.g., stocks or life insurance)

- 1 Extremely bored
- 2 Moderately bored
- 3 Slightly bored
- 4 Neither bored nor excited
- 5 Slightly excited
- 6 Moderately excited
- 7 Extremely excited

Q8k Utility bill payment

Utility bill payment (e.g., internet or water)

- 1 Extremely bored
- 2 Moderately bored
- 3 Slightly bored
- 4 Neither bored nor excited
- 5 Slightly excited
- 6 Moderately excited
- 7 Extremely excited

Q8l Home repairs

Home repairs

- 1 Extremely bored
- 2 Moderately bored
- 3 Slightly bored
- 4 Neither bored nor excited
- 5 Slightly excited
- 6 Moderately excited
- 7 Extremely excited

Q8m Childcare

Childcare (e.g., daycare, preschool, babysitter)

- 1 Extremely bored
- 2 Moderately bored
- 3 Slightly bored
- 4 Neither bored nor excited
- 5 Slightly excited
- 6 Moderately excited
- 7 Extremely excited

Q8n Auto insurance

Auto insurance

- 1 Extremely bored
- 2 Moderately bored
- 3 Slightly bored
- 4 Neither bored nor excited
- 5 Slightly excited
- 6 Moderately excited
- 7 Extremely excited

Q8o Managing household budget

Managing household budget

- 1 Extremely bored
- 2 Moderately bored
- 3 Slightly bored
- 4 Neither bored nor excited
- 5 Slightly excited
- 6 Moderately excited
- 7 Extremely excited

Q8p Grocery purchases

Grocery purchases

- 1 Extremely bored
- 2 Moderately bored
- 3 Slightly bored
- 4 Neither bored nor excited
- 5 Slightly excited
- 6 Moderately excited
- 7 Extremely excited

[End of table display]

[The following questions are displayed as a table]

Q9_intro financial decisions how much intro

How much of an impact will the outcome of these decisions have on your life?

Q9a Tax return preparation

Tax return preparation

- 1 A great deal
- 2 A lot
- 3 A moderate amount
- 4 A little
- 5 Not at all

Q9b Health insurance coverage

Health insurance coverage

- 1 A great deal
- 2 A lot
- 3 A moderate amount
- 4 A little
- 5 Not at all

Q9c Car purchase

Car purchase

- 1 A great deal
- 2 A lot
- 3 A moderate amount
- 4 A little
- 5 Not at all

Q9d Retirement plan

Retirement plan

- 1 A great deal
- 2 A lot
- 3 A moderate amount
- 4 A little
- 5 Not at all

Q9e Home/apartment search

Home/apartment search

- 1 A great deal
- 2 A lot
- 3 A moderate amount
- 4 A little
- 5 Not at all

Q9f Home appliance purchase

Home appliance purchase

- 1 A great deal
- 2 A lot
- 3 A moderate amount
- 4 A little
- 5 Not at all

Q9g Student loans

Student loans

- 1 A great deal
- 2 A lot
- 3 A moderate amount
- 4 A little
- 5 Not at all

Q9h Home loans

Home loans (e.g., mortgage or home equity)

- 1 A great deal
- 2 A lot
- 3 A moderate amount
- 4 A little
- 5 Not at all

Q9i Auto loans

Auto loans

- 1 A great deal
- 2 A lot
- 3 A moderate amount
- 4 A little
- 5 Not at all

Q9j Investing

Investing (e.g., stocks or life insurance)

- 1 A great deal
- 2 A lot
- 3 A moderate amount
- 4 A little
- 5 Not at all

Q9k Utility bill payment

Utility bill payment (e.g., internet or water)

- 1 A great deal
- 2 A lot
- 3 A moderate amount
- 4 A little
- 5 Not at all

Q9l Home repairs

Home repairs

- 1 A great deal
- 2 A lot
- 3 A moderate amount
- 4 A little
- 5 Not at all

Q9m Childcare

Childcare (e.g., daycare, preschool, babysitter)

- 1 A great deal
- 2 A lot
- 3 A moderate amount
- 4 A little
- 5 Not at all

Q9n Auto insurance

Auto insurance

- 1 A great deal
- 2 A lot
- 3 A moderate amount
- 4 A little
- 5 Not at all

Q9o Managing household budget

Managing household budget

- 1 A great deal
- 2 A lot
- 3 A moderate amount
- 4 A little
- 5 Not at all

Q9p Grocery purchases

Grocery purchases

- 1 A great deal
- 2 A lot
- 3 A moderate amount
- 4 A little
- 5 Not at all

[End of table display]

[The following questions are displayed as a table]

Q10_intro managing money extent intro

When you think about managing your finances, to what extent do you feel:

Q10a Happy

Happy

- 1 Extremely
- 2 Very much
- 3 Somewhat
- 4 A little
- 5 Not at all

Q10b Satisfied

Satisfied

- 1 Extremely
- 2 Very much
- 3 Somewhat
- 4 A little
- 5 Not at all

Q10c Optimistic

Optimistic

- 1 Extremely
- 2 Very much
- 3 Somewhat
- 4 A little
- 5 Not at all

Q10d Stressed

Stressed

- 1 Extremely
- 2 Very much
- 3 Somewhat
- 4 A little
- 5 Not at all

Q10e Sad

Sad

- 1 Extremely
- 2 Very much
- 3 Somewhat
- 4 A little
- 5 Not at all

Q10f Regretful

Regretful

- 1 Extremely
- 2 Very much

- 3 Somewhat
- 4 A little
- 5 Not at all

Q10g Confident

Confident

- 1 Extremely
- 2 Very much
- 3 Somewhat
- 4 A little
- 5 Not at all

Q10h Effective

Effective

- 1 Extremely
- 2 Very much
- 3 Somewhat
- 4 A little
- 5 Not at all

[End of table display]

[The following questions are displayed as a table]

Q11_intro statements true intro

Please respond to the following statements.

Q11a hard to stick to my spending plan

It is hard to stick to my spending plan when unexpected expenses arise.

- 1 Exactly true
- 2 Moderately true
- 3 Slightly true
- 4 Not true at all

Q11b challenging to make progress toward financial goals

It is challenging to make progress toward my financial goals.

- 1 Exactly true
- 2 Moderately true
- 3 Slightly true
- 4 Not true at all

Q11c unexpected expenses

When unexpected expenses occur I usually have to use credit.

- 1 Exactly true
- 2 Moderately true
- 3 Slightly true
- 4 Not true at all

Q11d financial challenge

When faced with a financial challenge, I have a hard time figuring out a solution.

- 1 Exactly true
- 2 Moderately true
- 3 Slightly true
- 4 Not true at all

Q11e lack confidence

I lack confidence in my ability to manage my finances.

- 1 Exactly true
- 2 Moderately true
- 3 Slightly true
- 4 Not true at all

Q11f worry about running out of money in retirement

I worry about running out of money in retirement.

- 1 Exactly true
- 2 Moderately true
- 3 Slightly true
- 4 Not true at all

[End of table display]

[The following questions are displayed as a table]

Q12 how confident at filling out medical forms by self

How confident are you at filling out medical forms by yourself?

- 1 Not at all
- 2 A little
- 3 Somewhat
- 4 Quite a bit
- 5 Extremely

[End of table display]

[The following questions are displayed as a table]

Q13 problems learning about any medical conditions

How often do you have problems learning about any medical conditions you may have had or currently have because of difficulty understanding written information?

- 1 Always
- 2 Often
- 3 Sometimes
- 4 Rarely
- 5 Never

[End of table display]

[The following questions are displayed as a table]

Q14 help read hospital or medical materials

How often do you have someone like a family member, friend, hospital or clinic worker or caregiver, help you read hospital or medical materials?

- 1 Always
- 2 Often
- 3 Sometimes
- 4 Rarely
- 5 Never

[End of table display]

Q15 \$100 in a savings account earning 2 percent interest a year

Suppose you have \$100 in a savings account earning 2 percent interest a year. After five years, how much would you have?

- 1 More than \$102
- 2 Exactly \$102
- 3 Less than \$102
- 888 Don't know

Q16 interest rate on your savings account is 1 percent a year and inflation is 2 percent a year
Imagine that the interest rate on your savings account is 1 percent a year and inflation is 2 percent a year. After one year, would the money in the account buy more than it does today, exactly the same or less than today?

- 1 More
- 2 Same
- 3 Less
- 888 Don't know

Q17 bond prices

If interest rates rise, what will typically happen to bond prices? Rise, fall, stay the same, or is there no relationship?

- 1 Rise
- 2 Fall
- 3 Stay the same
- 4 No relationship
- 888 Don't know

Q18 higher monthly payments

True or false: A 15-year mortgage typically requires higher monthly payments than the 30-year mortgage but the total interest over the life of the loan will be less.

- 1 True
- 2 False
- 888 Don't know

Q19 Buying a single company's stock

True or false: Buying a single company's stock usually provides a safer return than a stock mutual fund.

- 1 True
- 2 False
- 888 Don't know

Q20 spend time with family who live with you

How often do you spend time with any members of your family, that is, any of your brothers, sisters, parents, or children, or extended family who currently live with you?

- 1 Several times a day
- 2 About once a day
- 3 Several times a week
- 4 About once a week
- 5 Two or three times a month
- 6 About once a month
- 7 Less than once a month
- 8 Never or hardly ever
- 888 Not applicable

[The following questions are displayed as a table]

Q21_intro communicate with any members of your family who currently live with you intro

How often do you communicate with any members of your family who currently live with you via...?

Q21a In-person visits

In-person visits

- 1 Always
- 2 Most of the time
- 3 About half the time
- 4 A little of the time
- 5 Never

Q21b Phone calls

Phone calls

- 1 Always
- 2 Most of the time
- 3 About half the time
- 4 A little of the time
- 5 Never

Q21c Emails

Emails

- 1 Always
- 2 Most of the time
- 3 About half the time
- 4 A little of the time
- 5 Never

Q21d Text messages

Text messages

- 1 Always
- 2 Most of the time
- 3 About half the time
- 4 A little of the time
- 5 Never

Q21e Social media posts

Social media posts

- 1 Always
- 2 Most of the time
- 3 About half the time
- 4 A little of the time
- 5 Never

Q21f Online video interactions

Online video interactions

- 1 Always
- 2 Most of the time
- 3 About half the time
- 4 A little of the time
- 5 Never

[End of table display]

Q22 spend time with family who do not live with you

How often do you spend time with any members of your family, that is, any of your brothers, sisters, parents, or children, or extended family who do not live with you?

- 1 Several times a day
- 2 About once a day
- 3 Several times a week
- 4 About once a week
- 5 Two or three times a month
- 6 About once a month
- 7 Less than once a month
- 8 Never or hardly ever
- 888 Not applicable

[The following questions are displayed as a table]

Q23_intro communicate with any members of your family who do not live with you intro
How often do you communicate with any members of your family who do not live with you via...?

Q23a In-person visits

In-person visits

- 1 Always
- 2 Most of the time
- 3 About half the time
- 4 A little of the time
- 5 Never

Q23b Phone calls

Phone calls

- 1 Always
- 2 Most of the time
- 3 About half the time
- 4 A little of the time
- 5 Never

Q23c Emails

Emails

- 1 Always
- 2 Most of the time
- 3 About half the time
- 4 A little of the time
- 5 Never

Q23d Text messages

Text messages

- 1 Always
- 2 Most of the time
- 3 About half the time
- 4 A little of the time
- 5 Never

Q23e Social media posts

Social media posts

- 1 Always
- 2 Most of the time
- 3 About half the time
- 4 A little of the time
- 5 Never

Q23f Online video interactions

Online video interactions

- 1 Always
- 2 Most of the time
- 3 About half the time
- 4 A little of the time
- 5 Never

[End of table display]

Q24 volunteer for an organization

Over the past year, approximately how often did you volunteer for an organization?

- 1 Daily

- 2 Multiple times a week
- 3 Once a week
- 4 Several times a month
- 5 Once a month
- 6 Several times over the past year
- 7 Once or twice
- 8 Never

Q25 vigorous physical activity

How many minutes per week do you engage in vigorous physical activity (e.g., running)?

Range: 0..10080

Q26 moderate physical activity

How many minutes per week do you engage in moderate physical activity (e.g., brisk walking)?

Range: 0..10080

Q27 light physical activity

How many minutes per week do you engage in light physical activity (e.g., gardening)?

Range: 0..10080

Q28 sleep

How many hours of sleep do you usually get each night on a typical weekday or workday?

- 0 0
- 1 1
- 2 2
- 3 3
- 4 4
- 5 5
- 6 6
- 7 7
- 8 8
- 9 9
- 10 10
- 11 11
- 12 12
- 13 13
- 14 14
- 15 15
- 16 16
- 17 17
- 18 18
- 19 19
- 20 20
- 21 21
- 22 22
- 23 23
- 24 24

[The following questions are displayed as a table]

Q29_intro five statements intro

Below are five statements that you may agree or disagree with. Indicate your agreement with each item. Please be open and honest in your responding.

Q29a In most ways my life is close to my ideal

In most ways my life is close to my ideal.

- 1 Strongly agree
- 2 Agree
- 3 Slightly agree
- 4 Neither agree nor disagree
- 5 Slightly disagree
- 6 Disagree
- 7 Strongly disagree

Q29b The conditions of my life are excellent
The conditions of my life are excellent.

- 1 Strongly agree
- 2 Agree
- 3 Slightly agree
- 4 Neither agree nor disagree
- 5 Slightly disagree
- 6 Disagree
- 7 Strongly disagree

Q29c I am satisfied with my life
I am satisfied with my life.

- 1 Strongly agree
- 2 Agree
- 3 Slightly agree
- 4 Neither agree nor disagree
- 5 Slightly disagree
- 6 Disagree
- 7 Strongly disagree

Q29d So far I have gotten the important things I want in life
So far I have gotten the important things I want in life.

- 1 Strongly agree
- 2 Agree
- 3 Slightly agree
- 4 Neither agree nor disagree
- 5 Slightly disagree
- 6 Disagree
- 7 Strongly disagree

Q29e If I could live my life over, I would change almost nothing
If I could live my life over, I would change almost nothing.

- 1 Strongly agree
- 2 Agree
- 3 Slightly agree
- 4 Neither agree nor disagree
- 5 Slightly disagree
- 6 Disagree
- 7 Strongly disagree

[End of table display]

[The following questions are displayed as a table]

Q30 time point you stand at now

Please slide the red dot to where it best represents the time point you stand at now. You may also click on the line rather than sliding the red dot.

Range: 0.0..100.0

[End of table display]

[The following questions are displayed as a table]

Q31_intro I see myself as intro
I see myself as:

Q31a Extroverted, enthusiastic

Extroverted, enthusiastic

- 1 Disagree strongly
- 2 Disagree moderately
- 3 Disagree a little
- 4 Neither agree nor disagree
- 5 Agree a little
- 6 Agree moderately
- 7 Agree strongly

Q31b Critical, quarrelsome

Critical, quarrelsome

- 1 Disagree strongly
- 2 Disagree moderately
- 3 Disagree a little
- 4 Neither agree nor disagree
- 5 Agree a little
- 6 Agree moderately
- 7 Agree strongly

Q31c Dependable, self-disciplined

Dependable, self-disciplined

- 1 Disagree strongly
- 2 Disagree moderately
- 3 Disagree a little
- 4 Neither agree nor disagree
- 5 Agree a little
- 6 Agree moderately
- 7 Agree strongly

Q31d Anxious, easily upset

Anxious, easily upset

- 1 Disagree strongly
- 2 Disagree moderately
- 3 Disagree a little
- 4 Neither agree nor disagree
- 5 Agree a little
- 6 Agree moderately
- 7 Agree strongly

Q31e Open to new experiences, complex

Open to new experiences, complex

- 1 Disagree strongly
- 2 Disagree moderately
- 3 Disagree a little
- 4 Neither agree nor disagree
- 5 Agree a little
- 6 Agree moderately
- 7 Agree strongly

Q31f Reserved, quiet

Reserved, quiet

- 1 Disagree strongly
- 2 Disagree moderately
- 3 Disagree a little
- 4 Neither agree nor disagree
- 5 Agree a little
- 6 Agree moderately
- 7 Agree strongly

Q31g Sympathetic, warm

Sympathetic, warm

- 1 Disagree strongly
- 2 Disagree moderately
- 3 Disagree a little
- 4 Neither agree nor disagree
- 5 Agree a little
- 6 Agree moderately
- 7 Agree strongly

Q31h Disorganized, careless

Disorganized, careless

- 1 Disagree strongly
- 2 Disagree moderately
- 3 Disagree a little
- 4 Neither agree nor disagree
- 5 Agree a little
- 6 Agree moderately
- 7 Agree strongly

Q31i Calm, emotionally stable

Calm, emotionally stable

- 1 Disagree strongly
- 2 Disagree moderately
- 3 Disagree a little
- 4 Neither agree nor disagree
- 5 Agree a little
- 6 Agree moderately
- 7 Agree strongly

Q31j Conventional, uncreative

Conventional, uncreative

- 1 Disagree strongly
- 2 Disagree moderately
- 3 Disagree a little
- 4 Neither agree nor disagree
- 5 Agree a little
- 6 Agree moderately
- 7 Agree strongly

[End of table display]

[The following questions are displayed as a table]

Q32 health

In general, do you consider your health to be:

- 1 Poor

- 2 Fair
- 3 Good
- 4 Very good
- 5 Excellent

[End of table display]

CS_001 HOW PLEASANT INTERVIEW

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

- 1 Very interesting
- 2 Interesting
- 3 Neither interesting nor uninteresting
- 4 Uninteresting
- 5 Very uninteresting