

## Well Being 479

**q1** q1

Do you currently receive any income from Social Security?

1 Yes

2 No

IF q1 = Yes THEN

|

| **q2** q2

| Social Security pays out different benefits depending on age, health status, and family characteristics. What kind of Social Security income do you receive? Check all that apply.

| 1 Retirement

| 2 Disability

| 3 Spousal

| 4 Survivors

| 5 Dependent

| 6 Don't Know

|

ENDIF

IF q1 = No THEN

|

| **q3** q3

| Do you expect to receive Social Security benefits at some time in the future?

| 1 Yes

| 2 No

|

ENDIF

IF q3 = Yes THEN

|

| **q4** q4

| Do you expect to receive benefits based on:

| 1 My own employment record only

| 2 Spouse's employment record only (current, previous, or deceased spouse)

| 3 Both my own and my spouse's employment records

|

| **q5** q5

| Social Security pays out different benefits depending on age, health status, and family characteristics. What kind of Social Security income do you expect to receive? Check all that apply.

| 1 Retirement

| 2 Disability

| 3 Spousal

| 4 Survivors

| 5 Dependent

| 6 Don't Know

|

| **q6** q6

| At what age do you expect to start collecting these benefits?

| Integer

|

| **q7** q7

| If you start collecting Social Security benefits then, about how much do you expect the payments to be in today's dollars, per month?

```

| Integer
|
| IF q7 = EMPTY THEN
| |
| | q7_700 q7 700
| | If you start collecting Social Security benefits then, about how much do you expect the payments
| | to be in today's dollars, per month? Is it more than $700?
| | 1 Yes
| | 2 No
| |
| | IF q7 700 = Yes THEN
| | |
| | | q7_1000 q7 1000
| | | If you start collecting Social Security benefits then, about how much do you expect the
| | | payments to be in today's dollars, per month? Is it more than $1,000?
| | | 1 Yes
| | | 2 No
| | |
| | | IF q7 1000 = Yes THEN
| | | |
| | | | q7_2000 q7 2000
| | | | If you start collecting Social Security benefits then, about how much do you expect the
| | | | payments to be in today's dollars, per month? Is it more than $2,000?
| | | | 1 Yes
| | | | 2 No
| | | |
| | | | ENDIF
| | |
| | | ELSEIF q7 700 = No THEN
| | | |
| | | | q7_500 q7 500
| | | | If you start collecting Social Security benefits then, about how much do you expect the
| | | | payments to be in today's dollars, per month? Is it more than $500?
| | | | 1 Yes
| | | | 2 No
| | | |
| | | | ENDIF
| | |
| | | ENDIF
| |
| ENDIF
|
| IF q4 = My own employment record only OR q4= Both my own and my spouse's employment records
| THEN
| |
| | q8 q8
| | Is this amount based on how much you've earned up until this point, or does it also include
| | how much you plan to work before claiming benefits?
| | 1 Only includes earnings up until this point
| | 2 Also includes future earnings
| |
| | IF q8 = Also includes future earnings THEN
| | |
| | | q9 q9
| | | How much would you expect your benefit to be if you stopped working now, per month? Even if
| | | you don't know exactly, please give your best guess.
| | | Integer
| | |
| | |

```

|| **q10** q10

|| You just answered that the new amount of your Social Security benefits would be \$[q9] per  
|| month. Did you mean that the new benefit level would be \$[q9] lower, so that the new benefit  
|| level would be \$[fill q10]?

|| 1 Yes, that is what I meant. The new benefit level would be \$[fill q10] per month

|| 2 No, I meant that the new benefit level would be \$[q9] per month

||

|| ENDIF

||

|| IF q8 = Only includes earnings up until this point THEN

||

|| **q11** q11

|| Given how much you expect to work between now and when you collect Social Security benefits,  
|| do you expect your benefit to be higher than if you stopped working now?

|| 1 Yes

|| 2 No

||

|| ENDIF

||

|| **q12** q12

|| Given how much you expect to work between now and when you begin collecting Social Security  
|| benefits, how much would you expect your benefit to be, per month? Even if you don't know  
|| exactly, please give your best guess.

|| Integer

||

|| **q13** q13

|| You just answered that the new amount of your Social Security benefits would be \$[q12] per  
|| month. Did you mean that the new benefit level would be \$[q12] higher, so that the new benefit  
|| level would be \$[fill q13]?

|| 1 Yes, that is what I meant. The new benefit level would be \$[fill q13] per month

|| 2 No, I meant that the new benefit level would be \$[q12] per month

||

|| **q14** q14

|| How much, on average, do you expect to earn per year between now and when you stop working?

|| Integer

||

|| **q15** q15

|| At what age do you expect to stop working?

|| Integer

||

|| **q16** q16

|| Suppose you work as you currently expect between now and when you begin collecting Social  
|| Security benefits, but you earn 25% more than you expect to right now, or approximately \$[fill  
|| q16] per year. Do you expect your Social Security benefit to be higher when you collect at age  
|| [q6]?

|| 1 Yes

|| 2 No

||

|| **q17** q17

|| Given that you would be earning 25% more than you expect between now and when you begin  
|| collecting Social Security benefits, how much would you expect your benefit to be, per month?  
|| Even if you don't know exactly, please give your best guess.

|| Integer

||

|| IF q11 = No THEN

||

||

|| ENDIF

|| IF q11 = Yes THEN

|| ENDIF

|| **q18** q18

|| You just answered that the new amount of your Social Security benefits would be \$[q17] per month. Did you mean that the new benefit level would be \$[q17] higher, so that the new benefit level would be \$[fill q18]?

|| 1 Yes, that is what I meant. The new benefit level would be \$[fill q18] per month

|| 2 No, I meant that the new benefit level would be \$[q17] per month

|| **q19** q19

|| Suppose you work as you currently expect between now and when you collect Social Security benefits, but you earn 25% less, or a quarter less, than you expect to right now, or approximately \$[fill q19] per year. Do you expect your Social Security benefit to be higher when you begin collecting at age [q6]?

|| 1 Yes

|| 2 No

|| **q20** q20

|| Given that you would be earning 25% less than you expect between now and when you begin collecting Social Security benefits, how much would you expect your benefit to be, per month? Even if you don't know exactly, please give your best guess.

|| Integer

|| IF q11 = No THEN

|| ENDIF

|| IF q11 = Yes THEN

|| ENDIF

|| **q21** q21

|| You just answered that the new amount of your Social Security benefits would be \$[q20] per month. Did you mean that the new benefit level would be \$[q20] lower, so that the new benefit level would be \$[fill q21]?

|| 1 Yes, that is what I meant. The new benefit level would be \$[fill q21]

|| 2 No, I meant that the new benefit level would be \$[q20] per month

|| IF q8 = Also includes future earnings THEN

|| ENDIF

|| IF q8 = Only includes earnings up until this point THEN

|| ENDIF

|| **q22** q22

|| Now suppose that instead of collecting benefits at age [q6], you started collecting benefits at age 62, what do you think your Social Security benefits would be in today's dollars, per month? Assume that []

|| Integer

```
|| IF q22 = EMPTY THEN
|||
||| q22_700 q22 700
||| Now suppose that instead of collecting benefits at age [q6], you started collecting benefits
||| at age 62, what do you think your Social Security benefits would be in today's dollars, per
||| month? Assume that  Is it more than $700?
||| 1 Yes
||| 2 No
|||
||| IF q22 700 = Yes THEN
||| |
||| | q22_1000 q22 1000
||| | Now suppose that instead of collecting benefits at age [q6], you started collecting benefits
||| | at age 62, what do you think your Social Security benefits would be in today's dollars, per
||| | month? Assume that  Is it more than $1,000?
||| | 1 Yes
||| | 2 No
||| |
||| | IF q22 1000 = Yes THEN
||| | |
||| | | q22_2000 q22 2000
||| | | Now suppose that instead of collecting benefits at age [q6], you started collecting
||| | | benefits at age 62, what do you think your Social Security benefits would be in today's
||| | | dollars, per month? Assume that  Is it more than $2,000?
||| | | 1 Yes
||| | | 2 No
||| | |
||| | | ENDIF
||| |
||| | ELSEIF q22 700 = No THEN
||| | |
||| | | q22_500 q22 500
||| | | Now suppose that instead of collecting benefits at age [q6], you started collecting benefits
||| | | at age 62, what do you think your Social Security benefits would be in today's dollars, per
||| | | month? Assume that  Is it more than $500?
||| | | 1 Yes
||| | | 2 No
||| | |
||| | | ENDIF
||| |
||| | ENDIF
|||
||| IF BIRTH YEAR = EMPTY THEN
||| |
||| | birthyear BIRTH YEAR
||| | Year
||| | 11 1911
||| | 12 1912
||| | 13 1913
||| | 14 1914
||| | 15 1915
||| | 16 1916
||| | 17 1917
||| | 18 1918
||| | 19 1919
||| | 20 1920
```

||| 21 1921  
||| 22 1922  
||| 23 1923  
||| 24 1924  
||| 25 1925  
||| 26 1926  
||| 27 1927  
||| 28 1928  
||| 29 1929  
||| 30 1930  
||| 31 1931  
||| 32 1932  
||| 33 1933  
||| 34 1934  
||| 35 1935  
||| 36 1936  
||| 37 1937  
||| 38 1938  
||| 39 1939  
||| 40 1940  
||| 41 1941  
||| 42 1942  
||| 43 1943  
||| 44 1944  
||| 45 1945  
||| 46 1946  
||| 47 1947  
||| 48 1948  
||| 49 1949  
||| 50 1950  
||| 51 1951  
||| 52 1952  
||| 53 1953  
||| 54 1954  
||| 55 1955  
||| 56 1956  
||| 57 1957  
||| 58 1958  
||| 59 1959  
||| 60 1960  
||| 61 1961  
||| 62 1962  
||| 63 1963  
||| 64 1964  
||| 65 1965  
||| 66 1966  
||| 67 1967  
||| 68 1968  
||| 69 1969  
||| 70 1970  
||| 71 1971  
||| 72 1972  
||| 73 1973  
||| 74 1974  
||| 75 1975  
||| 76 1976

```

||| 77 1977
||| 78 1978
||| 79 1979
||| 80 1980
||| 81 1981
||| 82 1982
||| 83 1983
||| 84 1984
||| 85 1985
||| 86 1986
||| 87 1987
||| 88 1988
||| 89 1989
||| 90 1990
||| 91 1991
||| 92 1992
||| 93 1993
||| 94 1994
||| 95 1995
||| 96 1996
||| 97 1997
||| 98 1998
||| 99 1999
|||
||| ENDIF
|||
||| IF BIRTH YEAR < 1960 THEN
|||
||| ELSE
|||
||| ENDIF
|||
||| q23 q23
||| Now suppose that instead of collecting benefits at age [q6], you started collecting benefits at
||| [q23 fill retirement age], what do you think your Social Security benefits would be in today's
||| dollars, per month? Assume that []
||| Integer
|||
||| IF q23 = EMPTY THEN
|||
||| q23_700 q23 700
||| Now suppose that instead of collecting benefits at age [q6], you started collecting benefits
||| at [q23 fill retirement age], what do you think your Social Security benefits would be in
||| today's dollars, per month? Assume that [] Is it more than $700?
||| 1 Yes
||| 2 No
|||
||| IF q23 700 = Yes THEN
|||
||| q23_1000 q23 1000
||| Now suppose that instead of collecting benefits at age [q6], you started collecting benefits
||| at [q23 fill retirement age], what do you think your Social Security benefits would be in
||| today's dollars, per month? Assume that [] Is it more than $1,000?
||| 1 Yes
||| 2 No
|||

```

```

|||| IF q23 1000 = Yes THEN
||||
||||| q23_2000 q23 2000
||||| Now suppose that instead of collecting benefits at age [q6], you started collecting
||||| benefits at [q23 fill retirement age], what do you think your Social Security benefits
||||| would be in today's dollars, per month? Assume that [] Is it more than $2,000?
||||| 1 Yes
||||| 2 No
|||||
||||| ENDIF
||||
||| ELSEIF q23 700 = No THEN
|||
||| q23_500 q23 500
||| Now suppose that instead of collecting benefits at age [q6], you started collecting benefits
||| at [q23 fill retirement age], what do you think your Social Security benefits would be in
||| today's dollars, per month? Assume that [] s it more than $500?
||| 1 Yes
||| 2 No
|||
||| ENDIF
||
|| ENDIF
|
| ENDIF
|
| ENDIF

```

```

IF q3 = No THEN
|
| [The following questions are displayed as a table]
|
| q24 q24
| Why don't you expect to collect Social Security benefits? Check all that apply.
| 1 Won't have worked enough
| 2 My occupation isn't eligible
| 3 Won't live long enough
| 4 Social Security won't be around long enough
| 5 Other $Answer2$
|
| q24_other q24 other
|
| String
|
| [End of table display]
|
| ENDIF

```

```

q25 q25
Are you married?
1 Yes
2 No

```

```

IF q25 = Yes THEN
|
| q26 q26
| Do you live with your spouse?

```



| 1 Yes

| 2 No

|

ENDIF

IF q25 = No THEN

|

| **q27** q27

| Are you living with a partner as if married?

| 1 Yes

| 2 No

|

ENDIF

IF ( q26 = Yes AND q25 = Yes ) OR ( q27 = Yes ) THEN

|

ELSE

|

ENDIF

**q28** q28

Are you doing any work for pay at the present time?

1 Yes

2 No

IF q28 = Yes THEN

|

| **q29** q29

| Do you work for someone else or are you self-employed? If you run your own business, check 'self-employed'. If you both work for someone else and are self-employed, check both boxes.

| 1 Someone else

| 2 Self-employed

|

| **q30** q30

| How many hours a week do you usually work over all your jobs?

| Range: 0..168

|

| **q31** q31

| Do you work [q30] number of hours nearly every week, or do the hours you work vary a lot from week to week?

| 1 Same each week

| 2 Vary a lot

|

| IF q31 = Vary a lot THEN

||

|| **q32** q32

|| How many hours would you work in a week with relatively long hours?

|| Range: 1..168

||

|| **q33** q33

|| How many hours in a relatively short week?

|| Range: 1..168

||

| ENDIF

|

| **q34** q34

| Including any paid vacation, sick time, and personal days, how many weeks a year do you usually  
| work on this job?

| Range: 0..52

|  
ENDIF

**q35\_intro** q35 intro

We are interested in how people are getting along financially these days. The next questions are  
about income you [and your SpousePartner] received in the past year.

IF Self-employed IN q29 THEN

|  
| **q35** q35

| About how much did your self-employment income amount to in the past year, including any profits  
| left in the business, before taxes and other deductions?

| Range: 0..99999996

|  
| IF q35 = EMPTY THEN

|| **q35\_10000** q35 10000

|| About how much did your self-employment income amount to in the past year, including any profits  
|| left in the business, before taxes and other deductions? Is it more than \$10,000?

|| 1 Yes

|| 2 No

||  
|| IF q35 10000 = Yes THEN

||| **q35\_25000** q35 25000

||| About how much did your self-employment income amount to in the past year, including any  
||| profits left in the business, before taxes and other deductions? Is it more than \$25,000?

||| 1 Yes

||| 2 No

|||  
||| IF q35 25000 = Yes THEN

|||| **q35\_100000** q35 100000

|||| About how much did your self-employment income amount to in the past year, including any  
|||| profits left in the business, before taxes and other deductions? Is it more than \$100,000?

|||| 1 Yes

|||| 2 No

||||  
|||| ENDIF

|||  
||| ELSEIF q35 10000 = No THEN

||| **q35\_5000** q35 5000

||| About how much did your self-employment income amount to in the past year, including any  
||| profits left in the business, before taxes and other deductions? Is it more than \$5,000?

||| 1 Yes

||| 2 No

|||  
||| ENDIF

|  
| ENDIF

|  
ENDIF

IF Someone else IN q29 THEN

| **q36** q36

| About how much wage and salary income did you receive in the past year, over all your jobs, before taxes and other deductions?

| Range: 0..99999996

| IF q36 = EMPTY THEN

|| **q36\_10000** q36 10000

|| About how much wage and salary income did you receive in the past year, over all your jobs, before taxes and other deductions? Is it more than \$10,000?

|| 1 Yes

|| 2 No

|| IF q36 10000 = Yes THEN

||| **q36\_25000** q36 25000

||| About how much wage and salary income did you receive in the past year, over all your jobs, before taxes and other deductions? Is it more than \$25,000?

||| 1 Yes

||| 2 No

||| IF q36 25000 = Yes THEN

||| **q36\_100000** q36 100000

||| About how much wage and salary income did you receive in the past year, over all your jobs, before taxes and other deductions? Is it more than \$100,000?

||| 1 Yes

||| 2 No

||| ENDIF

|| ELSEIF q36 10000 = No THEN

||| **q36\_5000** q35 5000

||| About how much wage and salary income did you receive in the past year, over all your jobs, before taxes and other deductions? Is it more than \$5,000?

||| 1 Yes

||| 2 No

||| ENDIF

| ENDIF

ENDIF

IF ( q26 = Yes AND q25 = Yes ) OR ( q27 = Yes ) THEN

| **q37** q37

| Did your spouse/partner do any work for pay last year?

| 1 Yes

| 2 No

| **q38** q38

| About how much income from work did your spouse/partner receive in the past year, over all jobs,  
| before taxes and other deductions?

| Integer

| IF q38 = EMPTY THEN

|| **q38\_10000** q38 10000

|| About how much income from work did your spouse/partner receive in the past year, over all jobs,  
|| before taxes and other deductions? Is it more than \$10,000?

|| 1 Yes

|| 2 No

|| IF q38 10000 = Yes THEN

||| **q38\_25000** q38 25000

||| About how much income from work did your spouse/partner receive in the past year, over all  
||| jobs, before taxes and other deductions? Is it more than \$25,000?

||| 1 Yes

||| 2 No

||| IF q38 25000 = Yes THEN

||| **q38\_100000** q38 100000

||| About how much income from work did your spouse/partner receive in the past year, over all  
||| jobs, before taxes and other deductions? Is it more than \$100,000?

||| 1 Yes

||| 2 No

||| ENDIF

|| ELSEIF q38 10000 = No THEN

||| **q38\_5000** q38 5000

||| About how much income from work did your spouse/partner receive in the past year, over all  
||| jobs, before taxes and other deductions? Is it more than \$5,000?

||| 1 Yes

||| 2 No

||| ENDIF

|| ENDIF

ENDIF

IF q37 = Yes OR q28 = Yes THEN

ELSE

ENDIF

**q39** q39

[q39 question text work or not work]

Range: 0..99999996

IF q39 = EMPTY THEN

```

| q39_25000 q39 25000
| [q39 question text work or not work] Is it more than $25,000?
| 1 Yes
| 2 No
|
| IF q39 25000 = Yes THEN
| |
| | q39_100000 q39 100000
| | [q39 question text work or not work] Is it more than $100,000?
| | 1 Yes
| | 2 No
| |
| | IF q39 100000 = Yes THEN
| | |
| | | q39_200000 q39 200000
| | | [q39 question text work or not work] Is it more than $200,000?
| | | 1 Yes
| | | 2 No
| | |
| | | ENDIF
| |
| ELSEIF q39 25000 = No THEN
| |
| | q39_10000 q39 10000
| | [q39 question text work or not work] Is it more than $10,000?
| | 1 Yes
| | 2 No
| |
| | IF q39 10000 = No THEN
| | |
| | | q39_5000 q39 5000
| | | [q39 question text work or not work] Is it more than $5,000?
| | | 1 Yes
| | | 2 No
| | |
| | | ENDIF
| |
| ENDIF
|
| ENDIF

```

**q40** q40

Do you [orFLSpousePartner] currently have any money or assets that are held in an Individual Retirement Account, that is, in an IRA or KEOGH account?

- 1 Yes
- 2 Previously had accounts, not now
- 3 No

IF q40 = Yes THEN

| [The following questions are displayed as a table]

| **q41** q41

| How many IRA or KEOGH accounts do you [and your SpousePartner] have?

- | 1 One
- | 2 Two

| 3 Three

| 4 More than 3 (please specify number): \$Answer2\$

| **q41\_other** q41 other

| Integer

| [End of table display]

| IF q41 = RESPONSE THEN

|| IF q41 < More than 3 (please specify number): \$Answer2\$ THEN

|| ELSEIF q41 = More than 3 (please specify number): \$Answer2\$ AND q41 other =RESPONSE  
|| THEN

|| ELSE

|| ENDIF

| ENDIF

| IF how\_many\_iras in q41 > 5 THEN

| ENDIF

| LOOP FROM 1 TO [how\_many\_iras in q41] DO

|| IF counter section3 = 1 THEN

|| ENDIF

|| IF counter section3 = 2 THEN

|| ENDIF

|| IF counter section3 = 3 THEN

|| ENDIF

|| IF counter section3 = 4 THEN

|| ENDIF

|| IF counter section3 = 5 THEN

|| ENDIF

| **q42** q47

| Now think about the [q42 fill for first second third] of these IRA. About how much is in this  
| IRA at the present time?

| Range: 0..99999996

| IF q47 = EMPTY THEN

|| **q42\_25000** q42 25000

|| Now think about the [q42 fill for first second third] of these IRA. About how much is in this

```
||| IRA at the present time? Is it more than $25,000?
||| 1 Yes
||| 2 No
|||
||| IF q42 25000 = Yes THEN
|||
||| q42_100000 q42 100000
||| Now think about the [q42 fill for first second third] of these IRA. About how much is in
||| this IRA at the present time? Is it more than $100,000?
||| 1 Yes
||| 2 No
|||
||| IF q42 100000 = Yes THEN
|||
||| q42_400000 q42 400000
||| Now think about the [q42 fill for first second third] of these IRA. About how much is in
||| this IRA at the present time? Is it more than $400,000?
||| 1 Yes
||| 2 No
|||
||| ENDIF
|||
||| ELSEIF q42 25000 = No THEN
|||
||| q42_10000 q42 10000
||| Now think about the [q42 fill for first second third] of these IRA. About how much is in
||| this IRA at the present time? Is it more than $10,000?
||| 1 Yes
||| 2 No
|||
||| ENDIF
|||
||| ENDIF
|||
||| ENDDO
|
| q43 q43
| Did you [orFLSpousePartner] put any new money into any of these IRA or KEOGH accounts in the past
| year?
| 1 Yes
| 2 No
|
| IF q43 = Yes THEN
|
| q44 q44
| About how much new money did you [orFLSpousePartner] put into these accounts in the past year?
| Range: 0..999996
|
| IF q44 = EMPTY THEN
|
| q44_2000 q44 2000
| About how much new money did you [orFLSpousePartner] put into these accounts in the past year?
| Is it more than $2,000?
| 1 Yes
| 2 No
|||
```

```

||| IF q44 2000 = Yes THEN
||||
|||| q44_4000 q44 4000
|||| About how much new money did you [orFLSpousePartner] put into these accounts in the past
|||| year? Is it more than $4,000?
|||| 1 Yes
|||| 2 No
||||
||| ELSEIF q44 2000 = No THEN
||||
|||| q44_1000 q44 1000
|||| About how much new money did you [orFLSpousePartner] put into these accounts in the past
|||| year? Is it more than $1,000?
|||| 1 Yes
|||| 2 No
||||
||| ENDIF
|||
|| ENDIF
||
| ENDIF
|
ENDIF

```

**q45** q45

Do you [orFLSpousePartner] currently have any money or assets that are held in a 401(k), 403(b), or other employer-provided pension plans that allow you to contribute a portion of your paycheck?

- 1 Yes
- 2 No

```
IF q45 = Yes THEN
```

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

```
| q46 q46
```

```
| How many of these types of employer-provided pension plans do you [orFLSpousePartner] have?
```

- | 1 One
- | 2 Two
- | 3 Three
- | 4 More than 3 (please specify number): \$Answer2\$

```
| q46_other q46 other
```

```
| Integer
```

```
| [End of table display]
```

```
| IF q46 = RESPONSE THEN
```

```
|| IF q46 < More than 3 (please specify number): $Answer2$ THEN
```

```
|| ELSEIF q46 = More than 3 (please specify number): $Answer2$ AND q46 other =RESPONSE
|| THEN
```

```
|| ELSE
```

```
|| ENDIF
```



```

||
|ENDIF
|
|IF how_many_pensions in q46 > 5 THEN
||
|ENDIF
|
|LOOP FROM 1 TO [how_many_pensions in q46] DO
||
||IF counter section3 = 1 THEN
|||
|||ENDIF
||
||IF counter section3 = 2 THEN
|||
|||ENDIF
||
||IF counter section3 = 3 THEN
|||
|||ENDIF
||
||IF counter section3 = 4 THEN
|||
|||ENDIF
||
||IF counter section3 = 5 THEN
|||
|||ENDIF
||
||q47 q47
|| Now think about the [q47 fill for first second third] of these employer-provided pension plans.
|| About how much is in this plan at the present time?
|| Range: 0..99999996
||
||IF q47 = EMPTY THEN
|||
|||q47_25000 q47 25000
||| Now think about the [q47 fill for first second third] of these employer-provided pension
||| plans. About how much is in this plan at the present time? Is it more than $25,000?
||| 1 Yes
||| 2 No
|||
|||IF q47 25000 = Yes THEN
||||
||||q47_100000 q47 100000
|||| Now think about the [q47 fill for first second third] of these employer-provided pension
|||| plans. About how much is in this plan at the present time? Is it more than $100,000?
|||| 1 Yes
|||| 2 No
||||
||||IF q47 100000 = Yes THEN
|||||
|||||q47_400000 q47 400000
||||| Now think about the [q47 fill for first second third] of these employer-provided pension
||||| plans. About how much is in this plan at the present time? Is it more than $400,000?
||||| 1 Yes

```

```
|||| 2 No
||||
|||| ENDIF
||||
||| ELSEIF q47 25000 = No THEN
||||
|||| q47_10000 q47 10000
|||| Now think about the [q47 fill for first second third] of these employer-provided pension
|||| plans. About how much is in this plan at the present time? Is it more than $10,000?
|||| 1 Yes
|||| 2 No
||||
|||| ENDIF
|||
|| ENDDO
||
| ENDIF
|
| q48 q48
| Did you [orFLSpousePartner] put any new money into any of these employer-provided pension plans in
| the past year?
| 1 Yes
| 2 No
|
| IF q48 = Yes THEN
||
|| q49 q49
|| About how much new money did you [orFLSpousePartner] put into these employer-provided pension
|| plans in the past year?
|| Range: 0..999996
||
|| IF q49 = EMPTY THEN
|||
||| q49_5000 q49 5000
||| About how much new money did you [orFLSpousePartner] put into these employer-provided pension
||| plans in the past year? Is it more than $5,000?
||| 1 Yes
||| 2 No
|||
||| IF q49 5000 = Yes THEN
|||
||| q49_10000 q49 10000
||| About how much new money did you [orFLSpousePartner] put into these employer-provided
||| pension plans in the past year? Is it more than $10,000?
||| 1 Yes
||| 2 No
|||
||| IF q49 10000 = Yes THEN
|||
||| q49_30000 q49 30000
||| About how much new money did you [orFLSpousePartner] put into these employer-provided
||| pension plans in the past year? Is it more than $30,000?
||| 1 Yes
||| 2 No
|||
||| ENDIF
```

```

||||
||| ELSEIF q49 5000 = No THEN
||||
|||| q49_1500 q49 1500
|||| About how much new money did you [orFLSpousePartner] put into these employer-provided
|||| pension plans in the past year? Is it more than $1,500?
|||| 1 Yes
|||| 2 No
||||
||| ENDIF
|||
||| ENDIF
|||
| ENDIF
|
ENDIF

```

**q50** q50

Do you [orFLSpousePartner] currently have any accounts with money or assets that you are planning on using for retirement or other long-term savings, other than discussed above?

- 1 Yes
- 2 No

IF q50 = Yes THEN

| [The following questions are displayed as a table]

| **q51** q51

| How many of these types of these long-term savings accounts do you [and your SpousePartner] have?

- | 1 One
- | 2 Two
- | 3 Three
- | 4 More than 3 (please specify number): \$Answer2\$

| **q51\_other** q51 other

| Integer

| [End of table display]

| IF q51 = RESPONSE THEN

|| IF q51 < More than 3 (please specify number): \$Answer2\$ THEN

|| ELSEIF q51 = More than 3 (please specify number): \$Answer2\$ AND q51 other =RESPONSE THEN

|| ELSE

|| ENDIF

| ENDIF

| IF how\_many\_savings in q51 > 5 THEN

| ENDIF

```

|
| LOOP FROM 1 TO [how_many_savings in q51] DO
| |
| | IF counter section3 = 1 THEN
| | |
| | | ENDFIF
| | |
| | IF counter section3 = 2 THEN
| | |
| | | ENDFIF
| | |
| | IF counter section3 = 3 THEN
| | |
| | | ENDFIF
| | |
| | IF counter section3 = 4 THEN
| | |
| | | ENDFIF
| | |
| | IF counter section3 = 5 THEN
| | |
| | | ENDFIF
| | |
| | q52 q52
| | Now think about the [q52 fill for first second third] of these long-term savings accounts.
| | About how much is in this plan at the present time?
| | Range: 0..99999996
| |
| | IF q52 = EMPTY THEN
| | |
| | | q52_25000 q52 25000
| | | Now think about the [q52 fill for first second third] of these long-term savings accounts.
| | | About how much is in this plan at the present time? Is it more than $25,000?
| | | 1 Yes
| | | 2 No
| | |
| | | IF q52 25000 = Yes THEN
| | | |
| | | | q52_100000 q52 100000
| | | | Now think about the [q52 fill for first second third] of these long-term savings accounts.
| | | | About how much is in this plan at the present time? Is it more than $100,000?
| | | | 1 Yes
| | | | 2 No
| | | |
| | | | IF q52 100000 = Yes THEN
| | | | |
| | | | | q52_400000 q52 400000
| | | | | Now think about the [q52 fill for first second third] of these long-term savings
| | | | | accounts. About how much is in this plan at the present time? Is it more than $400,000?
| | | | | 1 Yes
| | | | | 2 No
| | | | |
| | | | ENDFIF
| | | |
| | | ELSEIF q52 25000 = No THEN
| | | |

```

```
|||| q52_10000 q52 10000
|||| Now think about the [q52 fill for first second third] of these long-term savings accounts.
|||| About how much is in this plan at the present time? Is it more than $10,000?
|||| 1 Yes
|||| 2 No
||||
|||| ENDIF
||||
|||| ENDDO
||||
|||| q53 q53
|||| Did you [orFLSpousePartner] put any new money into any of these long-term savings accounts in
|||| the past year?
|||| 1 Yes
|||| 2 No
||||
|||| IF q53 = Yes THEN
||||
|||| q54 q54
|||| About how much new money did you [orFLSpousePartner] put into these long-term savings
|||| accounts in the past year?
|||| Range: 0..999996
||||
|||| IF q54 = EMPTY THEN
||||
|||| q54_5000 q54 5000
|||| About how much new money did you [orFLSpousePartner] put into these long-term savings
|||| accounts in the past year? Is it more than $5,000?
|||| 1 Yes
|||| 2 No
||||
|||| IF q54 5000 = Yes THEN
||||
|||| q54_10000 q54 10000
|||| About how much new money did you [orFLSpousePartner] put into these long-term savings
|||| accounts in the past year? Is it more than $10,000?
|||| 1 Yes
|||| 2 No
||||
|||| IF q54 10000 = Yes THEN
||||
|||| q54_30000 q54 30000
|||| About how much new money did you [orFLSpousePartner] put into these long-term savings
|||| accounts in the past year? Is it more than $30,000?
|||| 1 Yes
|||| 2 No
||||
|||| ENDIF
||||
|||| ELSEIF q54 5000 = No THEN
||||
|||| q54_1500 q54 1500
|||| About how much new money did you [orFLSpousePartner] put into these long-term savings
|||| accounts in the past year? Is it more than $1,500?
|||| 1 Yes
|||| 2 No
```

```
|||||
||||| ENDIF
|||||
||| ENDIF
|||
|| ENDIF
||
| ENDIF
|
ENDIF
```

**q55** q55

Thinking of the Social Security program in general and not just your own Social Security benefits: on a scale from 0 to 100, (where 0 means no chance and 100 means absolutely certain), what is the percent chance that Congress will change Social Security sometime in the next 10 years, so that it becomes less generous than now?

Range: 0..100

```
IF q55 = 50 THEN
```

```
|
| q56 q56
| Do you think it is about equally likely as it is unlikely or are you just unsure?
| 1 Equally likely
| 2 Unsure
```

```
|
ENDIF
```

```
IF q1 = Yes THEN
```

```
|
| q57 q57
| We just asked you about changes to Social Security in general. Now we would like to know
| whether you think these Social Security changes might affect your own benefits. On a scale from 0
| to 100, (where 0 means no chance and 100 means absolutely certain,) what do you think is the
| percent chance that the benefits you yourself are receiving from Social Security will be cut some
| time over the next 10 years?
| Range: 0..100
```

```
|
ELSE
```

```
|
| q58 q58
| We just asked you about changes to Social Security in general. Now we would like to know
| whether you think these Social Security changes might affect your own benefits. On a scale from 0
| to 100, what do you think is the percent chance that over the next 10 years there will be changes
| to Social Security that will reduce your future benefits compared to what you would get under the
| current system? 0 is absolutely no chance, and 100 is absolutely certain.
| Range: 0..100
```

```
|
ENDIF
```

**q59** q59

Have you ever signed up for an online mySSA account from the Social Security website? This account provides personalized benefit information and allows you to check your history of earnings. You would have had to provide your name and Social Security Number to create a user ID and password.

1 Yes  
2 No

IF q59 = Yes THEN

| **q60** q60

| When did you sign up for this account?

- | 1 In the past year
- | 2 1 year ago
- | 3 2 years ago
- | 4 3 years ago
- | 5 4 years ago
- | 6 5 or more years ago
- | 7 Do not recall

| **q61** q61

| How often have you visited your mySSA account?

- | 1 Daily
- | 2 Weekly
- | 3 Monthly
- | 4 A few times a year
- | 5 Once a year
- | 6 Less frequently than once a year
- | 7 Just once

| **q62** q62

| Which of the following information have you viewed with your mySSA account? Check all that apply.

- | 1 Retirement benefit
- | 2 Disability benefit
- | 3 Survivor benefit
- | 4 Spousal benefit
- | 5 Earnings History
- | 6 Spousal earnings
- | 7 Prior employers
- | 8 Didn't view any information/don't remember

| **q63** q63

| Was your mySSA account useful for planning for retirement or claiming Social Security benefits?

- | 1 Yes
- | 2 No

| IF q63 = Yes THEN

|| **q63\_yes** q63 if yes

|| You stated your mySSA account was useful for planning for retirement or claiming Social Security benefits. Please check all that apply:

- || 1 Planning when to retire
- || 2 Planning when to claim Social Security retirement benefits
- || 3 Deciding whether to claim Social Security disability benefits
- || 4 Deciding whether to claim other Social Security benefits

| ENDIF

| **q64** q64

| Did using your mySSA account change how or how much you save for retirement?

- | 1 Yes
- | 2 No

| IF q64 = Yes THEN

|  
| | **q64\_yes** q64 yes  
| | You stated that using your mySSA account changed how or how much you saved for retirement.  
| | Please check all that apply.  
| | 1 I increased saving substantially  
| | 2 I increased saving somewhat  
| | 3 It didn't affect my saving  
| | 4 I decreased saving somewhat  
| | 5 I decreased saving substantially  
| |  
| ENDIF

| **q65** q65

| Did using your mySSA account change how many hours you worked?

| 1 Yes  
| 2 No

| IF q65 = Yes THEN

|  
| | **q65\_yes** q65 yes  
| | You stated that using your mySSA account changed how many hours you worked. Please check all  
| | that apply.  
| | 1 I increased my hours worked substantially  
| | 2 I increased my hours somewhat  
| | 3 It didn't affect how many hours I worked  
| | 4 I decreased my hours somewhat  
| | 5 I decreased my hours substantially  
| |  
| ENDIF

| ENDIF

**q66** q66

Have you ever received a Social Security Statement? This Statement is a document prepared just for you, with personalized information about your own benefit entitlements, as well as your history of earnings, and is sent to your current residential address.

1 Yes  
2 No

| IF q66 = Yes THEN

|  
| | **q67** q67  
| | When did you most recently receive a Statement?  
| | 1 Past year  
| | 2 1 year ago  
| | 3 2 years ago  
| | 4 3 years ago  
| | 5 4 years ago  
| | 6 5 or more years ago  
| | 7 Do not recall

| **q68** q68

| Which of the following information did you read in the Statement? Check all that apply.

| 1 Retirement benefit  
| 2 Disability benefit



- | 3 Survivor benefit
- | 4 Spousal benefit
- | 5 Earnings History
- | 6 Spousal earnings
- | 7 Prior employers
- | 8 Didn't view any information/don't remember

| **q69** q69

| Was the Social Security Statement useful to you when planning for retirement or claiming Social Security benefits?

- | 1 Yes
- | 2 No

| IF q69 = Yes THEN

|| **q69\_yes** q69 yes

|| You stated that the Social Security Statement useful to you when planning for retirement or claiming Social Security benefits. Please check all that apply.

- || 1 Planning when to retire
- || 2 Planning when to claim Social Security retirement benefits
- || 3 Deciding whether to claim Social Security disability benefits
- || 4 Deciding whether to claim other Social Security benefits

||  
| ENDIF

| **q70** q70

| Did reading the Social Security Statement change how or how much you save for retirement?

- | 1 Yes
- | 2 No

| IF q70 = Yes THEN

|| **q70\_yes** q70 yes

|| You stated that reading the Social Security Statement changed how or how much you saved for retirement. Please check all that apply.

- || 1 I increased saving substantially
- || 2 I increased saving somewhat
- || 3 It didn't affect my saving
- || 4 I decreased saving somewhat
- || 5 I decreased saving substantially

||  
| ENDIF

| **q71** q71

| Did reading the Social Security Statement change how much you worked?

- | 1 Yes
- | 2 No

| IF q71 = Yes THEN

|| **q71\_yes** q71 yes

|| You stated that reading the Social Security Statement changed how much you worked. Please check all that apply.

- || 1 I increased my hours worked substantially
- || 2 I increased my hours somewhat
- || 3 It didn't affect how many hours I worked

|| 4 I decreased my hours somewhat  
|| 5 I decreased my hours substantially  
||  
| ENDIF  
|  
ENDIF

**q72** q72

Have you otherwise sought or received information about your Social Security benefits?

- 1 Yes
- 2 No

IF q72 = Yes THEN

|  
| **q73** q73  
| From which sources have you sought or received information about your Social Security benefits?  
| Please check all that apply.  
| 1 Family members  
| 2 Accountants, lawyers, or other professionals  
| 3 Employer  
| 4 The Social Security website  
| 5 Other internet information sources  
| 6 A Social Security phone-line  
| 7 An in-person visit to a Social Security office  
| 8 Other Social Security notices sent via mail  
| 9 Other Social Security notices sent via email  
|

| **q74** q74

| When was the most recent time you've sought or received this information?

- | 1 Past year
- | 2 1 year ago
- | 3 2 years ago
- | 4 3 years ago
- | 5 4 years ago
- | 6 5 or more years ago
- | 7 Do not recall

|  
ENDIF

**CS\_001** HOW PLEASANT INTERVIEW

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

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

**CS\_003** comments

Do you have any other comments on the interview? Please type these in the box below.(If you have no comments, please click next to complete this survey.)

Open