Survey of Consumer Finances

(FR 3059; OMB No. 7100-0287)

Expires December 31, 2008

SURVEY CODEBOOK

NOTE: Data for the pretest and the survey would be collected using a computer program; thus there is no hardcopy version of the questionnaire other than the text of the computer program. For convenience of review, a copy of the preliminary 2007 survey codebook is attached. The wording of the survey questions may be modified somewhat after the results of the 2006 pretest are available, but it is anticipated that such changes would be minor.

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HOUSEHOLD LISTING

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X7504 INTERVIEWER: CHOOSE LANGUAGE TO CONDUCT INTERVIEW IN.

1. \*ENGLISH

2. \*SPANISH

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NOT INCLUDED IN THE PUBLIC DATA SET

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X7578 INTERVIEWER: ARE YOU CONDUCTING THIS INTERVIEW IN PERSON OR OVER THE

PHONE?

1. \*IN PERSON

5. \*ON THE PHONE

GF

X7579 INTERVIEWER: PLEASE CONFIRM THAT YOU ARE CONDUCTING THIS INTERVIEW

(ON THE PHONE/IN PERSON)

1. \*YES

2. \*NO

THIS STATEMENT MUST BE READ TO ALL RESPONDENTS:

This interview is completely voluntary and confidential,

and all the information collected will be used for

statistical purposes only. Because this interview is a

part of the Survey of Consumer Finances, I will be asking a

number of questions that have dollar answers. The most

useful answer is always an exact amount that truly reflects

your situation. However, this is not always possible--you

may not know the figure, or you may not feel comfortable

answering. Because your answers are so important to the

study, I am allowed to collect dollar ranges when no better

information is available. Of course, if there is a

question you cannot answer or do not want to answer, we

will move on at that point. Feel free to consult any

knowledgeable person or use any records and notes at any

time during this interview. And please ask questions

when anything is not clear.

HAND THE INSTITUTIONS CARD TO THE RESPONDENT AND SAY: As

we go through the interview, I will ask you to write a few

things on this card to help keep us on track. At the end

of the interview, I will either leave this card with you or

tear it up, whichever you prefer.

X8000 Original respondent and spouse/partner variables reversed.

THE PERSON REFERRED TO AS THE "HEAD" IN THIS CODEBOOK IS

EITHER THE MALE IN A MIXED-SEX COUPLE OR THE OLDER

INDIVIDUAL IN A SAME-SEX COUPLE. WHERE X8000=1, ALL

VARIABLES IN THE DATA SET THAT ORIGINALLY REFERRED TO

"RESPONDENT" AND "SPOUSE/PARTNER" AND ALL CODES THAT

CONTAIN THE SAME REFERENCES HAVE BEEN REVERSED. THIS

CHANGE IS MADE FOR CONVENIENCE IN PROCESSING THE DATA AND

INDICATES NO JUDGMENT WHATSOEVER ABOUT THE ARRANGEMENTS OF

INDIVIDUAL FAMILIES. THE QUESTION TEXT AND ASSOCIATED

CODES GIVEN HERE HAVE NOT BEEN ALTERED TO USE THE WORD

"HEAD." NO CHANGE IS MADE WHERE THE SPOUSE/PARTNER IS

NOT INCLUDED IN THE INTERVIEW (X100=5).

1. Reversed

5. Not reversed

In the 2004 SCF, the definitions used in determining

whether a spouse or partner is a part of the primary

economic unit changed somewhat from earlier SCFs. Most of

these changes affect small groups of the population. Two

groups account for most of the changes. First, cases where

the respondent intially reports being married, but the

spouse is not there (or it is questionable whether the

spouse is there) and does not share in the finances of the

unit (or it is questionable whether the spouse does so).

The second group is a roughly comparable group of partners.

Where respondents have not been willing to answer questions

about the presence of spouses or partner, default

assumptions were made.

X7019 The following variable summarizes the sets of possible martial

arrangements and specifies the assumption about whether a

spouse or partner is included in the primary economic unit.

The information used in this classification is based on the

answers of the original respondent; when X8000=5, this

information is contained in the first position of the

household listing variables below, and when X8000=1 the

information in the second position was used.

Note that unlike the case with other variables in the main

interview, variables in the initial household listing

describing the respondent's marital status are not imputed.

Initially-reported marital status=MARRIED

1. Spouse there now=YES, Spouse usually there=YES: Spouse

in PEU

2. Spouse there now=YES, Spouse usually there=NO, Have

shared finances=SHARED: Spouse in PEU

3. Spouse there now=YES, Spouse usually there=NO, Have

shared finances=NOT SHARED: Spouse not in PEU

4. Spouse there now=YES, Spouse usually there=NO, Have

shared finances=DK/REF: Q1428, Spouse not in PEU

5. Spouse there now=YES, Spouse usually there=DK/REF:

Spouse in PEU

6. Spouse there now=NO, Spouse usually there=YES, Live

with a partner=YES, Partner usually there=YES: Partner in PEU

7. Spouse there now=NO, Spouse usually there=YES, Live

with a partner=YES, Partner usually there=NO, Have

shared finances=SHARED: Partner in PEU

8. Spouse there now=NO, Spouse usually there=YES, Live

with a partner=YES, Partner usually there=NO, Have

shared finances=NOT SHARED: Neither spouse nor partner in PEU

9. Spouse there now=NO, Spouse usually there=YES, Live

with a partner=YES, Partner usually there=NO, Have

shared finances=DK/REF: Neither spouse nor partner in PEU

10. Spouse there now=NO, Spouse usually there=YES, Live

with a partner=YES, Partner usually there=DK/REF, Have

shared finances=SHARED: Partner in PEU

11. Spouse there now=NO, Spouse usually there=YES, Live

with a partner=YES, Partner usually there=DK/REF, Have

shared finances=NOT SHARED: Neither spouse nor partner in PEU

12. Spouse there now=NO, Spouse usually there=YES, Live

with a partner=YES, Partner usually there=DK/REF, Have

shared finances=DK/REF: Neither spouse nor partner in PEU

13. Spouse there now=NO, Spouse usually there=YES, Live

with a partner=NO: Spouse in PEU

14. Spouse there now=NO, Spouse usually there=YES, Live

with a partner=DK/REF: Spouse in PEU

15. Spouse there now=NO, Spouse usually there=NO, Live with

a partner=YES, Partner usually there=YES: Partner in

PEU

16. Spouse there now=NO, Spouse usually there=NO, Live with

a partner=YES, Partner usually there=NO, Have shared

finances= SHARED: Partner in PEU

17. Spouse there now=NO, Spouse usually there=NO, Live with

a partner=YES, Partner usually there=NO, Have shared

finances= Not SHARED: Neither spouse nor partner in PEU

18. Spouse there now=NO, Spouse usually there=NO, Live with

a partner=YES, Partner usually there=NO, Have shared

finances=DK/REF: Neither spouse nor partner in PEU

19. Spouse there now=NO, Spouse usually there=NO, Live with

a partner=YES, Partner usually there=DK/REF, Have

shared finances= SHARED: Partner in PEU

20. Spouse there now=NO, Spouse usually there=NO, Live with

a partner=YES, Partner usually there=DK/REF, Have

shared finances= Not SHARED: Neither spouse nor partner in PEU

21. Spouse there now=NO, Spouse usually there=NO, Live with

a partner=YES, Partner usually there=DK/REF, Have

shared finances=DK/REF: Neither spouse nor partner in PEU

22. Spouse there now=NO, Spouse usually there=NO, Live with

a partner=NO, Have shared finances= SHARED: Spouse in

PEU

23. Spouse there now=NO, Spouse usually there=NO, Live with

a partner=NO, Have shared finances= Not SHARED: Spouse

not in PEU

24. Spouse there now=NO, Spouse usually there=NO, Live with

a partner=NO, Have shared finances= DK/REF: Spouse not

in PEU

25. Spouse there now=NO, Spouse usually there=NO, Live with

a partner=DK/REF Have shared finances= SHARED:

Spouse in PEU

26. Spouse there now=NO, Spouse usually there=NO, Live with

a partner=DK/REF Have shared finances= Not SHARED:

Spouse not in PEU

27. Spouse there now=NO, Spouse usually there=NO, Live with

a partner=DK/REF Have shared finances= DK/REF: Spouse

not in PEU

28. Spouse there now=DK/REF, Spouse usually there=NO:

Spouse not in PEU

29. Spouse there now=DK/REF, Spouse usually there=YES:

Spouse in PEU

30. Spouse there now=NO, Spouse usually there=DK/REF, Live

with a partner=YES, Partner usually there=YES: Partner in PEU

31. Spouse there now=NO, Spouse usually there=DK/REF, Live

with a partner=YES, Partner usually there=NO, Have

shared finances= SHARED: Partner in PEU

32. Spouse there now=NO, Spouse usually there=DK/REF, Live

with a partner=YES, Partner usually there=NO, Have

shared finances= Not SHARED: Neither spouse nor

partner in PEU

33. Spouse there now=NO, Spouse usually there=DK/REF, Live

with a partner=YES, Partner usually there=NO, Have

shared finances= DK/REF: Neither spouse nor partner in PEU

34. Spouse there now=NO, Spouse usually there=DK/REF, Live

with a partner=YES, Partner usually there=DK/REF, Have

shared finances= SHARED: Partner in PEU

35. Spouse there now=NO, Spouse usually there=DK/REF, Live

with a partner=YES, Partner usually there=DK/REF, Have

shared finances= Not SHARED: Neither spouse nor

partner in PEU

36. Spouse there now=NO, Spouse usually there=DK/REF, Live

with a partner=YES, Partner usually there=DK/REF, Have

shared finances= DK/REF: Neither spouse nor partner in

PEU

37. Spouse there now=NO, Spouse usually there=DK/REF, Live

with a partner=NO, Have shared finances= SHARED: Spouse

in PEU

38. Spouse there now=NO, Spouse usually there=DK/REF, Live

with a partner=NO, Have shared finances= Not SHARED:

Spouse not in PEU

39. Spouse there now=NO, Spouse usually there=DK/REF, Live

with a partner=NO, Have shared finances= DK/REF:

Spouse not in PEU

40. Spouse there now=NO, Spouse usually there=DK/REF, Live

with a partner=DK/REF Have shared finances= SHARED:

Spouse in PEU

41. Spouse there now=NO, Spouse usually there=DK/REF, Live

with a partner=DK/REF Have shared finances= Not SHARED:

Spouse not in PEU

42. Spouse there now=NO, Spouse usually there=DK/REF, Live

with a partner=DK/REF Have shared finances= DK/REF:

Spouse not in PEU

43. Spouse there now=DK/REF, Spouse usually there=DK/REF:

Spouse not in PEU

Initially-reported marital status=LIVING WITH PARTNER

44. Partner usually there=YES: Partner in PEU

45. Partner usually there=NO, Have shared finances=SHARED:

Partner in PEU

46, Partner usually there=NO, Have shared finances=NOT

SHARED: Partner not in PEU

47. Partner usually there=NO, Have shared finances=DK/REF:

Partner not in PEU

48. Partner usually there=DK/REF, Have shared

finances=SHARED: Partner in PEU

49. Partner usually there=DK/REF, Have shared finances=NOT

SHARED: Partner not in PEU

50. Partner usually there=DK/REF, Have shared

finances=DK/REF: Partner not in PEU

Initially-reported marital status=SEPARATED

51. Live with a partner=YES, Partner usually there=YES:

Partner in PEU

52. Live with a partner=YES, Partner usually there=NO, Have

shared finances=SHARED: Partner in PEU

53. Live with a partner=YES, Partner usually there=NO, Have

shared finances=NOT SHARED: Partner not in PEU

54. Live with a partner=YES, Partner usually there=NO, Have

shared finances=DK/REF: Partner not in PEU

55. Live with a partner=YES, Partner usually there=DK/REF,

Have shared finances=SHARED: Partner in PEU

56. Live with a partner=YES, Partner usually there=DK/REF,

Have shared finances=NOT SHARED: Partner not in PEU

57. Live with a partner=YES, Partner usually there=DK/REF,

Have shared finances=DK/REF: Partner not in PEU

58. Live with a partner=NO: No partner in PEU

59. Live with a partner=DK/REF: No partner in PEU

Initially-reported marital status=DIVORCED OR WIDOWED

60. Live with a partner=YES, Partner usually there=YES:

Partner in PEU

61. Live with a partner=YES, Partner usually there=NO, Have

shared finances=SHARED: Partner in PEU

62. Live with a partner=YES, Partner usually there=NO, Have

shared finances=NOT SHARED: Partner not in PEU

63. Live with a partner=YES, Partner usually there=NO, Have

shared finances=DK/REF: Partner not in PEU

64. Live with a partner=YES, Partner usually there=DK/REF,

Have shared finances=SHARED: Partner in PEU

65. Live with a partner=YES, Partner usually there=DK/REF,

Have shared finances=NOT SHARED: Partner not in PEU

66. Live with a partner=YES, Partner usually there=DK/REF,

Have shared finances=DK/REF: Partner not in PEU

67. Live with a partner=NO: No spouse/partner in PEU

68. Live with a partner=DK/REF: no spouse/partner in PEU

Initially-reported marital status=NEVER MARRIED

69. Live with a partner=YES, Partner usually there=YES:

Partner in PEU

70. Live with a partner=YES, Partner usually there=NO, Have

shared finances=SHARED: Partner in PEU

71. Live with a partner=YES, Partner usually there=NO, Have

shared finances=NOT SHARED: Partner not in PEU

72. Live with a partner=YES, Partner usually there=NO, Have

shared finances=DK/REF: Partner not in PEU

73. Live with a partner=YES, Partner usually there=DK/REF,

Have shared finances=SHARED: Partner in PEU

74. Live with a partner=YES, Partner usually there=DK/REF,

Have shared finances=NOT SHARED: Partner not in

PEU

75. Live with a partner=YES, Partner usually there=DK/REF,

Have shared finances=DK/REF: Partner not in PEU

76. Live with a partner=NO: no spouse/partner in PEU

77. Live with a partner=DK/REF: no spouse/partner in PEU

Initially-reported marital status=DK/REF

78. Live with a partner=YES, Partner usually there=YES:

Partner in PEU

79. Live with a partner=YES, Partner usually there=NO, Have

shared finances=SHARED: Partner in PEU

80. Live with a partner=YES, Partner usually there=NO, Have

shared finances=NOT SHARED: Partner not in PEU

81. Live with a partner=YES, Partner usually there=NO, Have

shared finances=DK/REF: Partner not in PEU

82. Live with a partner=YES, Partner usually there=DK/REF,

Have shared finances=SHARED: Partner in PEU

83. Live with a partner=YES, Partner usually there=DK/REF,

Have shared finances=NOT SHARED: Partner not in PEU

84. Live with a partner=YES, Partner usually there=DK/REF,

Have shared finances=DK/REF: Partner not in PEU

85. Live with a partner=NO: no spouse/partner in PEU

86. Live with a partner=DK/REF: no spouse/partner in PEU

X7020 Spouse or partner assumed to be a part of the PEU.

1. No spouse or partner in the PEU

2. Spouse or partner included in the PEU

(X7019 IN (1 2 5 6 7 10 13 14 15 16 19 22 25 29 30 31

34 37 40 44 45 48 51 52 55 60 61 64 69 70 73 78 79 82))

X100 This variables indicates when there is information in the

initial household listing that indicates that the

respondent has a spouse or partner, but that person is not

included as a part of the PEU.

1. Included in Iw

5. Not included in Iw

0. Inap. (Spouse present; legally married and partner

present; absent partner; no spouse/partner)

X101 Number of people in the household according to the HHL.

Excludes people included in the household listing who do

not usually live there and who are financially independent.

Code total # of persons in HHL

11. 11 or more people

NOTE: detailed data (X8020 etc.) are collected on at most

10 people in the household. Respondents who provide

information on 10 people are asked whether there are any

other people in the household; X101 is coded 11 for

respondents who answer this question YES.

NOTE: in some cases, it is not known precisely whether a

spouse or partner is included in the household; in such

cases, an assumption is made and that assumption is

contained in X7020; the determination of X101 relies on

the assumption in X7020.

X7001 Number of people in the primary economic unit.

Code total # of persons

11. 11 or more people

NOTE: in some cases, it is not known precisely whether a

spouse or partner is included in the household; in such

cases, an assumption is made and that assumption is

contained in X7020; the determination of X7001 relies on

the assumption in X7020.

X8020(#1) Before we start the interview, I need to list the people who

X102(#2) live with you and obtain some basic information about each one.

X108(#3) Let's start with you.

X114(#4)

X120(#5) What is the next person's relationship to you?

X126(#6)

X132(#7) CODE RELATIVES OF SPOUSE/PARTNER THE SAME AS R'S RELATIVES.

X202(#8)

X208(#9) 1. \*RESPONDENT

X214(#10) 2. \*Spouse of R

X220(#11) 3. \*Partner of R

4. \*Child (in-law) (of R or Spouse/Partner)

5. \*Grandchild

6. \*Parent

7. \*Grandparent

8. \*Aunt/uncle

9. \*Cousin

10. \*Niece/nephew

11. \*Sister/brother

12. \*Great grandchild

29. \*Other relative

31. \*Roommate

32. \*Friend

34. \*Boarder or roomer/lodger

35. \*Paid help; maid, etc.

36. \*Foster child

39. \*Other unrelated person

45. Absent spouse, treated as PEU member

0. Inap. (No further persons)

NOTE: position #2 contains only spouse/partner information;

in all other cases the #2 position contains all zeroes.

NOTE: position #11 contains non-zero data only in cases

where there were 10 or more people in the household and the

respondent had no spouse/partner.

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FOR THE PUBLIC DATA SET, CODE 12 IS COMBINED WITH

CODE 5; CODES 31, 32 AND 36 ARE COMBINED WITH CODE

39; CODES 9 AND 10 ARE COMBINED WITH CODE 29

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X8021(#1) CODE SEX WITHOUT ASKING. IF NECESSARY, SAY:

X103(#2) (I am required to ask your sex.)

X109(#3)

X115(#4) 1. \*Male

X121(#5) 2. \*Female

X127(#6) 0. Inap. (No further persons)

X133(#7)

X203(#8)

X209(#9)

X215(#10)

X221(#11)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X109, X115, X121, X127, X133, X203, X209, X215 AND

X221 NOT INCLUDED IN THE PUBLIC DATA SET

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What is your date of birth?

What is (his/her) date of birth?

X5907(#1) Code month

X6107(#2)

0. Inap. (/no spouse or partner)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X7003(#1) Code day of month

X7382(#2)

0. Inap. (/no spouse or partner)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X5908(#1) Code year (4 digits)

X6108(#2)

0. Inap. (/no spouse or partner)

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FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-95

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GF

X8022(#1) FOR THE RESPONDENT, THIS VARIABLE CONTAINS THE DATE-OF-BIRTH

X104(#2) AGE UNLESS HE/SHE REJECTS THAT AGE WHEN ASKED FOR CONFIRMATION

X110(#3) AND PROVIDES ANOTHER AGE (SEE X14 BELOW).

X116(#4)

X122(#5) How old (are you/is [he/she/that person])?

X128(#6) CODE LESS THAN ONE YEAR AS 0.

X134(#7)

X204(#8) Code AGE

X210(#9) 0. Inap. (No further persons)

X216(#10) \*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X222(#11) FOR THE PUBLIC DATA SET, TOP-CODED AT 95;

X110, X116, X122, X128, X134, X204, X210, X216 AND

X222 NOT INCLUDED IN THE PUBLIC DATA SET

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X14 Respondent: "Reconciled age"

X19 Spouse: "Reconciled age"

IN THE CAPI PROGRAM USED IN THE SURVEY, DESIGNATED Rs

WERE FIRST ASKED THEIR DATE OF BIRTH (X5907/X7003/X5908 OR

X6107/X7382/X6108 DEPENDING ON THE VALUE OF X8000).

THE COMPUTER CALCULATED THEIR AGE AND THEN THE INTERVIEWER

ASKED FOR CONFIRMATION (X7005/X7015). AT THAT POINT, A

RESPONDENT COULD AGREE TO THE COMPUTED AGE, CORRECT THEIR

BIRTH DATE, OR PROVIDE A DIFFERENT AGE (X8022/X104). FOR

THE DESIGNATED R, THIS VARIABLE CONTAINS THE DOB AGE UNLESS

A DIFFERENT AGE WAS REPORTED SUBSEQUENTLY. FOR THE R'S

SPOUSE/PARTNER, ONLY AGE WAS ASKED DURING THE HOUSEHOLD

LISTING AND DATE OF BIRTH WAS ASKED LATER IN THE

QUESTIONNIARE. HOWEVER, THERE WAS NO CONFIRMATION/

RECONCILIATION BUILT INTO THE PROGRAM FOR THE SPOUSE/PARTNER.

THIS AGE VARIABLE WAS USED IN ALL CONVERSIONS OR

CALCULATIONS INVOLVING AGES OF R/S.

Code age

0. Inap. (No further persons)

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FOR THE PUBLIC DATA SET, TOP-CODED AT 95

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X13 Respondent: Age computed from date of birth

X18 Spouse: Age computed from date of birth

(BASED ON X5907/X7003/X5908 OR X6107/X7382/X6108 DEPENDING

ON THE VALUE OF X8000)

Code age

0. Inap. (No further persons)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X7005(#1) So, you are (COMPUTED AGE) years old?

X7015(#2)

(ASKED ONLY OF DESIGNATED RESPONDENT)

1. \*YES

3. \*NO, FIX BIRTHDATE

5. Missing value for year or month of birth

9. Not asked

0. Inap. (No spouse/partner)

X7006(#3) Is (he/she/that person) 18 or older?

X7007(#4)

X7008(#5) 1. \*YES

X7009(#6) 5. \*NO

X7010(#7) 0. Inap. (No further persons)

X7011(#8)

X7012(#9)

X7013(#10)

X7014(#11)

X8023(#1) (Are you/Is [RELATIONSHIP] currently married or

X105(#2) living with a partner, separated, divorced,

X111(#3) widowed, or (have you/has [he/she]) never been married?

X117(#4)

X123(#5) (NOTE: if R lives with a partner who is financially

X129(#6) interdependent, this variable is always coded '2' for the

X135(#7) head and partner. The legal marital status of R and of the

X205(#8) partner is given by X7372 and X7018 respectively.)

X211(#9

X217(#10 1. \*Married

X223(#11) 2. \*Living with a partner

3. \*Separated

4. \*Divorced

5. \*Widowed

6. \*Never married

0. Inap. (Person age 17 or less; no further persons)

NOTE: for the person in position #1, this variable

contains the current living arrangement, which is not

necessarily the information reported in the interview.

For example, a respondent may have answered "married" to

this question, but actually be living with a partner; in

this case, the variable has been recoded coded "partner":

such instances may be detected by the fact that J8023=8

and X102=3.

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FOR THE PUBLIC DATA SET (EXCEPT X8023 AND X105), CODES

3 AND 5 ARE COMBINED WITH CODE 4; CODE 2 IS COMBINED

WITH CODE 1

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X7000(#1) Does your (spouse/partner) live with you now?

X7016(#2)

1. \*YES

5. \*NO

9. Not asked

0. Inap. (No spouse/partner)

X7021(#1) Does your spouse usually live with you?

X7022(#2)

Does your partner usually live with you?

1. \*YES

5. \*NO

9. Not asked

0. Inap. (Does not initially report being either married

or living with a partner: X8023^=1, 2)

X7002(#1) Do you live with a partner?

X7017(#2)

1. \*YES

5. \*NO

9. Not asked

0. Inap. (Spouse living there)

X8024(#1) Does (he/she) usually live with you?

X106(#2) (FILLED IN FOR RESPONDENT)

X112(#3)

X118(#4) 1. \*YES (incl. R and Spouse/Partner)

X124(#5) 5. \*NO

X130(#6) 0. Inap. (Person other than #1/#2 under 18; no further persons)

X136(#7) (NOTE: X8024/X106 and X7021/X7022 may contain different values:

X206(#8) (1) R does not report being married or living with a partner

X212(#9) at X8023, but reports living with a partner at X7002

X218(#10) (2) R reports being married at X8023, but reports living with

X224(#11) a partner at X7002.)

X8098(#1) Do you and your (husband/wife/partner) have shared

X107(#2) finances?

X113(#3)

X119(#4) (ASKED ONLY IF SPOUSE/PARTNER DOES NOT USUALLY LIVE

X125(#5) THERE, OTHERWISE ASSUMED TO BE SHARED FINANCES.)

X131(#6)

X137(#7) Does (RELATIONSHIP) depend on you (and your

X207(#8) [husband/wife/partner]) for most of (his/her)

X213(#9) support or is (he/she) financially independent for

X219(#10) the most part?

X225(#11)

TREAT LIVE-IN SERVANTS AS FINANCIALLY INDEPENDENT.

(THIS QUESTION IS KEY IN DEFINING THE PRIMARY

ECONOMIC UNIT--SEE INTRODUCTION. A SPOUSE/PARTNER

WHO LIVES THERE AT THE TIME OF THE INTERVIEW OR WHO

USUALLY LIVES THERE IS ASSUMED TO BE FINANCIALL

INTERRELATED WITH THE R. SIMILARLY, CHILDREN UNDER

THE AGE OF 18 ARE ALSO ASSUMED TO BE FIANCIALLY

DEPENDENT ON THE R, EVEN THOUGH IT IS POSSIBLE THAT

SOME CHILDRENT OF PEOPLE OUTSIDE THE PEU MAY BE

INCLUDED BY THIS RULE.)

1. FINANCIALLY DEPENDENT/SHARED FINANCES (TRIVIALLY FOR R)

5. FINANCIALLY INDEPENDENT/NOT SHARED FINANCES

0. Inap. (No further persons)

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FINANCIAL INSTITUTIONS

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As we go through the interview, I will be asking you about

various kinds of financial matters--sometimes just for you,

but usually for you and your family living here. By "your

family living here" I mean only the following people...

X301 I'd like to start this interview by asking you about your

expectations for the future. Over the next five years, do

you expect the U.S. economy as a whole to perform better,

worse, or about the same as it has over the past five years?

1. \*Better

2. \*Worse

3. \*About the same

X302 Five years from now, do you think interest rates will be

higher, lower, or about the same as today?

1. \*Higher

2. \*Lower

3. \*About the same

X7100 IN PERSON VERSION:

(SHOW CARD 1)

When making major decisions about credit or borrowing, some

people shop around for the very best terms while others don't.

What number would (you/your family) be on the scale?

TELEPHONE VERSION:

On a scale from one to five, where one is almost no

shopping, three is moderate shopping, and five is a great

deal of shopping, where would (you/your family) be on the scale?

IF R SAYS "I DON'T BORROW", SAY: What did you do the last

time you borrowed?

1. \*ALMOST NO SHOPPING

2.

3. \*MODERATE SHOPPING

4.

5. \*A GREAT DEAL OF SHOPPING

NOTE: CARD 1 contains the following information:

The numbers 1 through 5 in a horizonal row bounded by dark

lines. Below 1 is printed "Almost no shopping"; below 3

is printed "Moderate shopping"; and below 5 is printed "A

great deal of shopping." Nothing is printed below 2 and 4.

GF

X7101 IN PERSON VERSION:

X7102 (SHOW CARD 2)

X7103 Please look at this list.

X7104 What sort of information do you (and your

X7105 [husband/wife/partner]) use to make decisions about credit or

X7106 borrowing? (Do you call around, read newspapers,

X7107 magazines, material you get in the mail, use information

X7108 from television, radio, the Internet or

X7109 advertisements? Do you get advice from a friend, relative,

X7110 lawyer, accountant, banker, broker, or financial planner?

X6849 Or do you do something else?)

X6861

X6862 TELEPHONE VERSION:

X6863 What sort of information do you (and your

X6864 [husband/wife/partner]) use to make decisions about credit or

borrowing? Do you call around, read newspapers,

magazines, material you get in the mail, use information

from television, radio, the Internet or

advertisements? Do you get advice from a friend, relative,

lawyer, accountant, banker, broker, or financial planner?

Or do you do something else?

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN.

1. \*CALL AROUND

2. \*MAGAZINES/NEWSPAPERS; books

3. \*MATERIAL IN THE MAIL

4. \*TELEVISION/RADIO

5. \*INTERNET/ONLINE SERVICE

6. \*ADVERTISEMENTS

7. \*FRIEND/RELATIVE

8. \*LAWYER

9. \*ACCOUNTANT

10. \*BANKER

11. \*BROKER

12. \*FINANCIAL PLANNER

13. \*SELF (NOT SHOWN ON CARD); spouse/partner

14. \*NEVER BORROW

16. Don't shop around; always use same institution

17. Past experience

18. Material from work/business contacts

19. Other personal research

20. Real estate broker; builder

21. Other institutional source (e.g., college, social service

agency, etc.)

22 Shop around

23. Store; dealer

24. Insurance agent

32. Telemarketer

-7. \*OTHER

X7111 IN PERSON VERSION:

(SHOW CARD 1)

When making major saving and investment decisions, some

people shop around for the very best terms while others don't.

What number would (you/your family) be on the scale?

TELEPHONE VERSION:

When making major saving and investment decisions, some

people shop around for the very best terms while others don't.

On a scale from one to five, where one is almost no

shopping, three is moderate shopping, and five is a great

deal of shopping, where would (you/your family) be on the scale?

1. \*ALMOST NO SHOPPING

2.

3. \*MODERATE SHOPPING

4.

5. \*A GREAT DEAL OF SHOPPING

NOTE: See X7100 for a description of CARD 1.

X7112 IN PERSON VERSION:

X7113 (SHOW CARD 2)

X7114 Please look at this list.

X7115 How do you (and your [husband/wife/partner])

X7116 make decisions about saving and investments? (Do you call

X7117 around, read newspapers, magazines, material you get in the

X7118 mail, use information from television, radio, the Internet

X7119 or advertisements? Do you get advice from a friend,

X7120 relative, lawyer, accountant, banker, broker, or

X7121 financial planner? Or do you do something else?)

X6865

X6866 TELEPHONE VERSION:

X6867 What sort of information do you (and your

X6868 [husband/wife/partner]) use to make decisions about saving and

X6869 investments? (Do you call around, read newspapers,

magazines, material you get in the mail, use information

from television, radio, the Internet or advertisements?

Do you get advice from a friend, relative, lawyer, accountant,

banker, broker, or financial planner? Or do you do something else?)

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN.

1. \*CALL AROUND

2. \*MAGAZINES/NEWSPAPERS; books

3. \*MATERIAL IN THE MAIL

4. \*TELEVISION/RADIO

5. \*INTERNET/ONLINE SERVICE

6. \*ADVERTISEMENTS

7. \*FRIEND/RELATIVE

8. \*LAWYER

9. \*ACCOUNTANT

10. \*BANKER

11. \*BROKER

12. \*FINANCIAL PLANNER

13. \*SELF (NOT SHOWN ON CARD); spouse/partner

14. \*DO NOT SAVE/INVEST

16. Don't shop around; always use same institution

17. Past experience

18. Material from work/business contacts

19. Investment club

20. Investment seminars

21. Other personal research

22. Shop around

23. Store; dealer

24. Insurance agent

32. Telemarketer

-7. \*OTHER

X6497 Do you or your (husbans/wife/partner) use any type of computer

software to help you with managing your money?

Do you use any type of computer software to help you with

managing your money?

1. \*YES

5. \*NO

X305 The next few questions are about the financial

institutions where you do business.

With how many financial institutions do you currently have

accounts or loans, or regularly do personal financial

business? Include banks, savings and loans, credit unions,

brokerages, loan companies, and so forth, but not

institutions where you have only credit cards or business

accounts.

With how many financial institutions do you and your family

living here currently have accounts or loans, or regularly

do personal financial business? Include banks, savings and

loans, credit unions, brokerages, loan companies, and so

forth, but not institutions where you have only credit

cards or business accounts.

X8300 Inferred number of institutions. When institutions were

reported (or in some cases, imputed) after the institution

data were collected (except in the case of bank-type credit

cards) the CAPI program returned to the institution

questions for the added institutions. In some cases,

interviewers failed to enter the new instituion properly,

so the followup questions were not generated by the CAPI

program. X8300 takes the originally reported value of X305

as its base and adds additional institutions whenever a

commercial bank, savings and loan, credit union, or

brokerage was reported without an initial link to the

institution data. Where more there were more than the 6

institutions on which detailed information was collected,

the total number of institutions was augmented and stored

in X8300. In cases where any of the first seven institutions

have been inferred from an interviewer error, the detailed

information (location and how R does business) has been

imputed.

Code NUMBER

-1. NONE

Institutions were enumerated by name, and the name was used

as a text fill later in the interview when, e.g., the R was

asked to identify the institution where the main checking

account was held. To protect the privacy of respondents,

this variable was not retained in the data set.

(What is the name of this financial institution?/

What is the name of the financial institution where you do

the most business?/What is the name of the financial

institution where you and your family living here do the

most business?)

[What is the name of the financial institution where you do

the (second/third/fourth/fifth/sixth/seventh) most business?/

What is the name of the financial institution where you and

your family living here do the (second/third/fourth/fifth/

sixth/seventh) most business?

IF R ASKS WHY WE NEED THE NAME, SAY: I only need to put

the name in the computer for the wording of some questions

later in the interview. Please feel free to call it

anything you like that you will recognize when we come to

it again.

Once the program had generated questions about the number

of institutions specified by X305, the program asked:

Do you have any other financial institutions which we have not

listed yet?

(Have you included all your accounts?/Have you included the

accounts for all the people in your household?)

If the R recalled an additional account, the program was

set up to augment the list of institutions until the

respondent said there were no more.

If X305 contained a value that indicated that there were

accounts, but the number was a missing value, the R was

asked:

X308(#1) IN PERSON VERSION:

X312(#2) (SHOW CARD 3)

X316(#3) About (name of institution), what kind of

X320(#4) institution is this? (Is it a commercial bank, a savings

X324(#5) and loan or savings bank, a credit union, a mortgage

X328(#6) company, a finance or loan company, a brokerage, or what?)

X332(#7)

TELEPHONE VERSION:

About (name of institution), what kind of

institution is this? Is it a commercial bank, a savings

and loan or savings bank, a credit union, a mortgage

company, a finance or loan company, a brokerage, or what?

(If R added institutions during the interview, the CAPI

program generated the detailed questions on those

institutions after the section on financial assets was

completed.)

MASTER INSTITUTION LIST

11. \*COMMERCIAL BANK; trust company

12. \*SAVINGS AND LOAN OR SAVINGS BANK

13. \*CREDIT UNION

14. \*FINANCE OR LOAN COMPANY

15. Store or dealer; utility company

16. \*BROKERAGE; "mutual fund," "hedge fund", n.f.s.; also

include general financial service companies that have

group membership restrictions (e.g., TIAA/CREF)

17. Insurance company

18. \*MORTGAGE COMPANY; mortgage broker

19. Contractor or developer; trailer park owner

20. Prior owner

21. Automobile finance company; GMAC, Ford Credit

22. Doctor or hospital; dentist; veterinarian

23. Lawyer

24. Accountant

25. Employer; former employer

26. Friend or Relative (not codeable above)

27. Individual Lender/Advisor (not codeable above)

28. Pension Administrator

29. "Broad financial services company" n.e.c.

30. Internet-based businesses, n.e.c. (note: excludes code 101)

31. Real estate (investment) company; includes land trusts

32. School/college/university

33. Local/county/state government (except Courts code 42)

34. Special federal government agency; FMHA, SBA, VA, FHA, HUD, NDSL

35. Federal government general or NA agency; IRS

36. Fiduciary/advisor, n.e.c.

37. Self/spouse/partner (manages own trust)

38. Bank or general purpose credit card company; Visa,

Carte Blanche, Master Card (except American Express code 51)

39. Union

40. Church

41. American Association of Retired Persons (AARP)

42. Courts

43. Collection agency; loan liquidator

44. Cooperative organization; "co-op"; agricultural

cooperative lending associations (FCS)

45. Specialized education lender, n.e.c.

46. Family trust; trust fund

47. Fraternal organization

50. Discover card/Novus (for X415 etc. only; "Sears" only,

use code 15)

51. American Express/Optima card

52. AT&T card

53. Gasoline company

56. Leasing company

57. Airline

61. Other membership organization; AAA, NEA, NTA (X415 etc. only)

62. Tribal and similar organizations

75. Foreign institution type

80. Direct student loan, n.e.c. (include references to Stafford,

Perkins, Ford, etc. student loans when a more specific

institution reference is not available).

81. Nonprofit credit counseling service

85. Ex-spouse

92. Money market (mutual) funds, n.f.s.

93. Farm-related lenders (not codeable above)

94. Investment/management companies or consultants, n.e.c.;

include specialized institutions providing private banking

and investment services to individuals

95. Non-financial institution (except codes 40-42 and 61)

101. Internet-based bill paying service

-1. Combinations of TYPES of financial institutions

-7. \*OTHER

0. Inap. (no institutions: X8300=-1/fewer than 2

institutions: X8300<2/fewer than 3 institutions: X8300<3/

fewer than 4 institutions: X8300<4/fewer than 5

institutions: X8300<5/fewer than 6 instiutions:

X8300<6/fewer than 7 institutions:X8300<7)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODES 42, 43 AND 81 ARE

COMBINED WITH CODE 95; CODES 39, 40, 41, AND 62 ARE

COMBINED WITH CODE 61; CODES 23 AND 36 ARE COMBINED

WITH CODE 24; CODES 33 AND 34 ARE COMBINED WITH CODE

35; CODES 50, 51, 52, AND 53 ARE COMBINED WITH CODE

38; CODE 29 IS COMBINED WITH CODE 11; CODE 101 IS

COMBINED WITH CODE 30

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOTE: CARD 3 was available to the interviewer. This card

contains the following in a vertical column: "Commercial

Bank," "Savings and Loan or Savings Bank," "Credit Union,"

"Finance or Loan Company," "Brokerage," and "Other."

NOTE: Throughout the codebook, there are variable which

are labeled "Recode: type of institution". In these

locations, the preceding question asks the respondent

whether the institution where a loan/account is held is

the same as one of the ones originally recorded in the

sequence here. If it was one of these, the interviewer

entered a link to the appropriate institution. If it was a

new institution and there were fewer than seven institutions

already listed, the interviewer was instructed to follow a

procedure to add the institution to the existing list of

institutions. Once seven institutions were recorded in the

list, the interviewer could either link to an institution

that had already been recorded or code an institution type

(e.g., commercial bank). For the cases where a link was

made to one of the listed institutions, the recode

variable contains a code for the institution type obtained

from matching to the sequence of variables described here.

Where the institution was one that was outside the scope of

the list, the recode variable contains a code for the

institution type as asked directly from the respondent.

NOTE: Examination of the data suggests that a relatively

small number of respondents reported that their mortgage

institution was a finance company and some others reported

that it was a brokerage. Examination of the name of the

institution, which is available for most cases in a

non-public internal data set, suggests that the respondent

misclassified a mortgage company or mortgage broker.

GF

X7035(#1) Does this institution have offices in more than one state?

X7037(#2)

X7039(#3) 1. \*YES

X7041(#4) 5. \*NO

X7043(#5) 0. Inap. (no institutions: X8300=-1/fewer than 2

X7045(#6) institutions: X8300<2/fewer than 3 institutions: X8300<3/

X7047(#7) fewer than 4 institutions: X8300<4/fewer than 5

institutions: X8300<5/fewer than 6 instiutions:

X8300<6/fewer than 7 institutions:X8300<7)

GF

Institution 1: X6600 X6601 X6602 X6603 X6604 X6605 X6606 X6607

X6870 X6871 X6872 X6873

Institution 2: X6608 X6609 X6610 X6611 X6612 X6613 X6614 X6615

X6874 X6875 X6876 X6877

Institution 3: X6616 X6617 X6618 X6619 X6620 X6621 X6622 X6623

X6878 X6879 X6880 X6881

Institution 4: X6624 X6625 X6626 X6627 X6628 X6629 X6630 X6631

X6882 X6883 X6884 X6885

Institution 5: X6632 X6633 X6634 X6635 X6636 X6637 X6638 X6639

X6886 X6887 X6888 X6889

Institution 6: X6640 X6641 X6642 X6643 X6644 X6645 X6646 X6647

X6890 X6891 X6892 X6893

Institution 7: X6656 X6657 X6658 X6659 X6660 X6661 X6662 X6663

X6894 X6895 X6896 X6897

IN PERSON VERSION:

(SHOW CARD 4)

What are the main ways (you do/your family

does) business with this institution [-by checks written on

the institution, by ATM (cash machine), by debit card, in

person, by mail, by talking with someone on the phone, by

touchtone service on the phone, by direct payment to or

from the institution, by computer or the Internet, by other

electronic transfer, or some other way]? Please start with

the most important way.

TELEPHONE VERSION:

What are the main ways (you do/your family

does) business with this institution [-by checks written on

the institution, by ATM (cash machine), by debit card, in

person, by mail, by talking with someone on the phone, by

touchtone service on the phone, by direct payment to or

from the institution, by computer or the Internet, by other

electronic transfer, or some other way]? Please start with

the most important way.

CODE ALL THAT APPLY: CODE MAIN METHOD FIRST AND REMAINDER

IN ORDER GIVEN.

1. \*ATM/CASH MACHINE/DEBIT CARD

2. \*IN PERSON

3. \*MAIL

4. \*PHONE - TALKING

5. \*DIRECT PAYMENT/DIRECT DEPOSIT TO INST

6. \*DON'T DO REGULAR BUSINESS

7. \*PHONE - USING TOUCHTONE SERVICE

8. \*DIRECT PAYMENT/DIRECT WITHDRAWAL FROM INST

9. \*OTHER ELECTRONIC TRANSFER

10. \*CHECK WRITTEN ON INSTITUTION; n.f.s.

11. R's agent or manager; personal banker; go-between

(this is a broad category that encompasses both

formal and informal relationships)

12. \*COMPUTER/INTERNET/ONLINE SERVICE/email

30. Fax Machine

33. Credit card

-7. \*OTHER

0. Inap. (no institutions: X8300=-1/fewer than 2

institutions: X8300<2/fewer than 3 institutions: X8300<3/

fewer than 4 institutions: X8300<4/fewer than 5

institutions: X8300<5/fewer than 6 instiutions:

X8300<6/fewer than 7 institutions:X8300<7)

GF

X310(#1) Roughly, how many miles is the office or ATM (cash machine)

X314(#2) of this institution from the home or workplace of the person

X318(#3) who uses it most often?

X322(#4)

X326(#5) IF R ASKS: WE WANT THE CLOSER OF THE DISTANCE FROM HOME OR

X330(#6) WORKPLACE.

X334(#7)

(Is it more than 50 miles?)

USE "OVER 50 MILES," "FOREIGN LOCATION", "TOLL-FREE PHONE",

"LOCAL POST BOX" OR "INTERNET" ONLY IF R CANNOT GIVE AN

ESTIMATE OF THE NUMBER OF MILES.

Code number of miles

51. \*OVER 50 MILES

992. \*FOREIGN LOCATION

-1. \*LESS THAN A MILE

-2. \*LOCATED AT WORK

-3. \*TOLL-FREE PHONE

-4. \*LOCAL POST BOX

-5. \*INTERNET/ONLINE SERVICE

0. Inap. (no institutions: X8300=-1/fewer than 2

institutions: X8300<2/fewer than 3 institutions: X8300<3/

fewer than 4 institutions: X8300<4/fewer than 5

institutions: X8300<5/fewer than 6 instiutions:

X8300<6/fewer than 7 institutions:X8300<7)

GF

X306 Do you (or your family living here) have a card that allows

you to deposit or withdraw money from this institution

(any of these institutions) using a cash machine or ATM?

1. \*YES

5. \*NO

0. Inap. (no institutions: X8300=-1)

WE CARE ABOUT WHETHER R HAS SUCH A CARD, NOT WHETHER R

USES IT.

X7582 A debit card is a card that you can present when you buy

things that automatically deducts the amount of the

purchase from the money in an account that you have.

Do you use any debit cards?

Does your family use any debit cards?

INTERVIEWER: WE CARE ABOUT USE, NOT WHETHER R HAS A DEBIT CARD.

INCLUDE ATM CARDS USED AS DEBIT CARDS AS WELL AS

VISA/MASTERCARD DEBIT CARDS.

1. \*YES

5. \*NO

0. Inap. (no institutions: X8300=-1)

GF

X7122 Some people have their paychecks or Social Security

benefits or other money automatically paid directly into

their accounts.

(Do you have any money directly deposited into your account?/

Do you have any money directly deposited into one of your

accounts?/

Do you or someone in your family living here have any money

directly deposited into your family's account?/

Do you or someone in your family living here have any money

directly deposited into one of your family's accounts?)

(IF R ASKS, DO NOT INCLUDE INTEREST PAID ON THE ACCOUNT.)

1. \*YES

5. \*NO

0. Inap. (no institiutions: X8300=-1)

What kinds of deposits are these?

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN.

X7123 \*PAYCHECK; OTHER INCOME FROM WORK (e.g., consulting fees);

reimbursements for work expenses

X7124 \*SOCIAL SECURITY; RAILROAD RETIREMENT

X6858 Pension or other retirement income; IRA/Keogh withdrawals;

annuity income

X6859 Royalties and other investment income, n.e.c.; trust income

1. Checked

5. Not checked

0. Inap. (no institutions, no automatic deposit: X7122=(0, 5))

X7125 \*OTHER

4. Disability payments; VA disability benefits

6. Supplemental Security Income (SSI) and other types of welfare

7. Automatic transfers TO THIS account FROM ANOTHER of

R's accounts

8. Automatic payments on loans made by R (i.e., loans

from which R receives income)

10. Alimony/support; other support from family members

13. Insurance reimbursement

15. Tax refund

16. Government payments (not classified elsewhere)

17. Periodic settlement of legal claim, estate, lottery,

or other such obligation, n.e.c.

18. Reimbursement from "flexible spending account"

22. Disbursements from loans

-7. Other

5. Not checked

0. Inap. (no institutions, no automatic deposit: X7122=(0, 5))

GF

X7126 Some people have their utility or insurance bills, mortgage

or rent payments, or other payments automatically deducted

from their accounts without having to write a check.

(Do you have any payments that you make in this way?/

Do you and your family living here have any payments that

you make in this way?)

DO NOT INCLUDE PAYROLL DEDUCTIONS, SUCH AS DEDUCTIONS FOR

HEALTH INSURANCE.

1. \*YES

5. \*NO

0. Inap. (no accounts: X8300=-1)

What sorts of payments are these?

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN.

X7127 \*UTILITY BILLS

X7128 \*MORTGAGE/RENT

X6790 \*INSURANCE

X6854 Automatic transfers FROM THIS account TO ANOTHER of R's

accounts/investments

X6855 Other payments of irregular bills (e.g., credit card bills)

X6856 Car loans; other non-mortgage loan payments (except

credit cards)

1. Checked

5. Not checked

0. Inap. (no accounts, no pre-auth. debits: X7126=(0, 5))

X7129 \*OTHER

X6857

X6860 4. Condominium/Coop fees

6. Lease payments

9. Cable, satellite TV/radio; newspapers; magazines

10. Gifts to charities/non-profits

11. Tuition

12. Health/sports club; YMCA/YWCA/YMHA/YWHA; membershsip

fees, n.e.c.

14. Alimony/support; other transfers to family members

17. Security system; garbage fees; other regular home

maintenance fees; housekeeper

18. Safety deposit box; other storage

19. Internet provider payment

20. Tax payments

25. Motor vehicle toll/parking pass/navigation

system/other vehicle-specific charges

26. Payment to household employees

-7. Other regular payments

5. Not checked

0. Inap. (no accounts, no pre-auth. debits: X7126=(0, 5))

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CREDIT ATTITUDES AND CREDIT CARDS

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X401 Now I would like to ask you some questions about how you

feel about credit. In general, do you think it is a good

idea or a bad idea for people to buy things on the

installment plan?

IF R SAYS THEY DO NOT NEED TO BORROW FOR ANYTHING, SAY:

What do you think in general?

1. \*Good idea

3. \*GOOD IN SOME WAYS, BAD IN OTHERS

5. \*Bad idea

People have many different reasons for borrowing money which

they pay back over a period of time. For each of the

reasons I read, please tell me whether you feel it is all

right for someone like yourself to borrow money...

X402 first, to cover the expenses of a vacation trip?

X403 next, to cover living expenses when income is cut?

X404 next, to finance the purchase of a fur coat or jewelry?

X405 next, to finance the purchase of a car?

X406 finally, to finance educational expenses?

1. \*YES

5. \*NO

X7131 [Have you and your (husband/wife/partner) applied for any

type of credit or loan in the last five years?/

Have you applied for any type of credit or loan in the last

five years?]

INCLUDE PRE-APPROVED CREDIT THAT R ACCEPTED.

1. \*YES

5. \*NO

X407 [In the past five years, has a particular lender or creditor

turned down any request you or your

(husband/wife/partner) made for credit, or not given you

as much credit as you applied for?/

In the past five years, has a particular lender or creditor

turned down any request you made for credit, or not given

you as much credit as you applied for?]

(PROBE: Turned down, or not as much credit?)

IF TURNED DOWN AND NOT AS MUCH CREDIT, ASK WHICH IS MORE RECENT.

1. \*Yes, turned down

3. \*Yes, not as much credit

5. \*No

0. Inap. (no credit application in previous 5 years: X7131=5)

X408 [Were you later able to obtain the full amount you or your

(husband/wife/partner) requested by reapplying to the same

institution or by applying elsewhere?/

Were you later able to obtain the full amount you requested

by reapplying to the same institution or by applying elsewhere?]

1. \*YES

3. \*Did Not Reapply

5. \*NO

0. Inap. (no credit application in previous 5 years: X7131=5;

not turned down: X407=5)

X7585 [On the most recent occasion, what reasons were you or your

(husband/wife/partner) (given for being turned down for

credit?/given for being unable to get as much credit as you

applied for?)/

On the most recent occasion, what reasons were you given for

(being turned down for credit?/being unable to get as much

credit as you applied for?)]

Personal Characteristics of Borrower

50. Family background/life history; who your parents

(relatives) are

51. Family size; number of children or dependents

52. Marital status

53. Sex

54. Combination of marital status and sex, "single men",

"married women"

55. Age

56. Race

57. Personal character/reputation, whether borrower is

stable, honest; known by other people trusted by institution

58. Health

59. Other personal characteristics of borrower

Credit Characteristics of Borrower

61. Need to have a checking/savings account (at institution)

62. Haven't established a credit history

63. Credit rating service/credit bureau reports

64. Credit records/history from other institution; other

loans or charge account; previous payment records; bankruptcy

65. Lack of/not enough assets/collateral/property to secure

the loan (except home ownership, code 74); size of down

payment; financial status

66. Amount of debt; size of other payments; ability to repay loan

67. Insufficient credit references

69. Other credit characteristics of borrower

Financial Characteristics of Borrower

70. Bad Credit, NEC

71. Time on current job

72. Job; type of work; steady/secure employment; good job

73. Lack of job; not working; on welfare

74. Lack of homeownership

75. Time at current address; time in community or state

76. Amount of income; "income"

77. Source of income; retired

78. Where you live; what type of neighborhood/area of city

you live in; if you live in the state/county

79. Other financial characteristics of borrower

Miscellaneous

81. Lack of familiarity/experience of lender with R; don't have an

account there; I'm not a credit union member

82. Previous bad experience, n.e.c.; had difficulty/been

turned down NA why

83. Institution is more "strict" in lending requirements,

NA in what areas

86. Not eligible for special type of credit (e.g.,

subsidized education loan)

87. "Discrimination"; references to red-lining, NA basis

88. Inconvenient/difficult (not codable above)

89. Other miscellaneous

90. Didn't approve of purpose for which money was to be borrowed

91. Loan was too large for source to handle; source doesn't

have much money to lend; money reserves of source are low

92. Interest

93. Insufficient collateral/equity

94. Loan too small

95. Unclear title

101. Error in credit report

102. Credit problems of ex-spouse

103. Characteristics of the collateral, n.e.c (e.g., too

many rental units in a condominium)

104. Error in processing application

105. Identity theft

-1. None; no reason was given; "bank policy

-7. Other, n.e.c.

0. Inap. (no credit application in previous 5 years: X7131=5;

not turned down: X407=5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODE 105 IS COMBINED

WITH CODE 101

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7584 What type of credit did you apply for?

1. \*Mortgage

2. \*Car loan; other vehicle loan

3. \*Other installment loan

4. \*Credit Card

6. Store account

17. Equity loan

18. Business/Investment loan

19. \*Line of credit

20. Personal loan

21. Consolidation loan

22. Student loan

23. Home improvement loan (except for code 17)

24. Construction loan, n.e.c.

-7. \*Other

0. Inap. (no credit application in previous 5 years: X7131=5;

not turned down: X407=5)

X409 [Was there any time in the past five years that you or your

(husband/wife/partner) thought of applying for credit at a

particular place, but changed your mind because you thought

you might be turned down?/

Was there any time in the past five years that you thought

of applying for credit at a particular place, but changed

your mind because you thought you might be turned down?0

1. \*YES

5. \*NO

X7583 [On the most recent occasion, why did you or your

(husband/wife/partner) think you might be turned down?/

On the most recent occasion, why did you think you might be

turned down?]

Personal Characteristics of Borrower

50. Family background/life history; who your parents

(relatives) are

51. Family size; number of children or dependents

52. Marital status

53. Sex

54. Combination of marital status and sex, "single men",

"married women"

55. Age

56. Race

57. Personal character/reputation, whether borrower is

stable, honest; known by other people trusted by institution

58. Health

59. Other personal characteristics of borrower

Credit Characteristics of Borrower

61. Need to have a checking/savings account (at institution)

62. Haven't established a credit history

63. Credit rating service/credit bureau reports

64. Credit records/history from other institiuon; other

loans or charge account; previous payment records;

bankruptcy

65. Lack of/not enough assets/collateral/property to secure

the loan (except home ownership, code 74); size of down

payment; financial status

66. Amount of debt; size of other payments; ability to repay loan

67. Insufficient credit references

69. Other credit characteristics of borrower

Financial Characteristics of Borrower

70. Bad Credit, NEC

71. Time on current job

72. Job; type of work; steady/secure employment; good job

73. Lack of job; not working; on welfare

74. Lack of homeownership

75. Time at current address; time in community or state

76. Amount of income; "income"

77. Source of income; retired

78. Where you live; what type of neighborhood/area of city

you live in; if you live in the state/county

79. Other financial characteristics of borrower

Miscellaneous

81. Lack of familiarity/experience of lender with R; don't have an

account there; I'm not a credit union member

82. Previous bad experience, n.e.c.; had difficulty/been

turned down NA why

83. Instutution is more "strict" in lending requirements,

NA in what areas

86. Not eligible for special type of credit (e.g.,

subsidized education loan)

87. "Discrimination"; references to red-lining, NA basis

88. Inconvenient/difficult (not codable above)

89. Other miscellaneous

90. Didn't approve of purpose for which money was to be borrowed

91. Loan was too large for source to handle; source doesn't

have much money to lend; money reserves of source are low

92. Interest

93. Insufficient collateral/equity

94. Loan too small

95. Unclear title

101. Error in credit report

102. Credit problems of ex-spouse

103. Characteristics of the collateral, n.e.c (e.g., too

many rental units in a condominium)

104. Error in processing application

105. Identity theft

-1. None; no reason was given; "bank policy"

-7. Other, n.e.c.

0. Inap. (did not expect to be turned down: X409=5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODE 105 IS COMBINED

WITH CODE 101

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

GF

X410 Now I have some questions about credit cards and charge cards.

(Do you have any credit cards or charge cards?/

Do you or anyone in your family living here have any credit

cards or charge cards?)

IF YES: Please do not include debit cards.

DO NOT INCLUDE CARDS USED ENTIRELY FOR BUSINESS.

1. \*YES

5. \*NO

X7973(#1) (Are any of the cards you have any type of/

Are any of the cards you and your family living here have

any type of) Visa, Mastercard, Discover, or American

Express cards you can pay off over time?

DO NOT INCLUDE REGULAR AMERICAN EXPRESS CHARGE CARDS.

X7974(#2) (Are any of the cards you have/

Are any of the cards you and your family living here have)

Macy's, Sears, Wal-Mart, furniture, clothing and other store cards?

X7975(#3) (Are any of the cards you have/

Are any of the cards you and your family living here have)

gasoline cards such as Shell or Exxon?

X7976(#4) (Are any of the cards you have/

Are any of the cards you and your family living here have)

American Express, Diners Club, or Carte Blanche cards?

INCLUDE AMERICAN EXPRESS CHARGE (NOT CREDIT) CARDS.

X7977(#5) (Do you have/Do you and your family living here) have any

other type of credit card?

IF YES: Please do not include telephone calling cards or

gift cards.

1. \*YES

5. \*NO

0. Inap. (no credit cards: X410=5)

X411(#1) How many?

X419(#2) Please do not count duplicate cards for the same account or

X422(#3) any business or company accounts.

X425(#4)

X428(#5) Code number

-1. None

0. Inap. (no credit cards: X410=5; no cards of type)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, THE NUMBER OF #1/2 CARDS IS

TOP-CODED AT 10, #3/4/5 CARDS ARE TOP-CODED AT 5

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X412(#1) (On your last bills, roughly how much were the new charges

X420(#2) made to these accounts?/

X423(#3) On your last bill, roughly how much were the new charges

X426(#4) made to this account?)

X429(#5)

IF R DID NOT RECEIVE A BILL LAST MONTH, CODE ZERO.

Code amount

-1. None

0. Inap. (no credit cards: X410=5; no cards of type)

X413(#1) (After the last payments were made on these accounts,

X421(#2) roughly what was the balance still owed on these accounts?/

X424(#3) After the last payment was made on this account, roughly

X427(#4) what was the balance still owed on this account?)

X430(#5)

WE WANT THE TOTAL AMOUNT OWED, NOT THE MINIMUM PAYMENT.

CODE ZERO IF ALL ACCOUNTS WERE PAID IN FULL.

Code amount

-1. None

0. Inap. (no credit cards: X410=5; no cards of type)

X414(#1) (What is the maximum amount you could borrow on all of these

accounts; that is, what is your total credit limit?/

What is the maximum amount you could borrow on this account;

that is, what is your total credit limit?)

Code amount

-1. No limit

0. Inap. (no credit cards: X410=5; no cards of type)

X7132(#1) What interest rate do you pay on the card where you have

the largest balance?

What is the interest rate on the card you got most recently?

What interest rate do you pay on this card?

INTERVIEWER: WE WANT TO KNOW THE RATE THAT R PAYS ON NEW

BALANCES.

IF RATE IS FOR A LIMITED-TIME, MAKE AN [F2] COMMENT.

Code percent \* 100

-1. No interest

0. Inap. (no credit cards: X410=5; no cards of type)

(#1) only: X415 X416 X417 X418 X7500 X6648 X6649 X6720

Please look at the list of institutions you wrote down.

(Is this/Are these) credit cards with any of the

institutions on the list, or from someplace else?

IF INSTITUTIONS LIST: Which institution?

IF "SOMEPLACE ELSE": (What institution is that?/

What type of institution is that?)

Please look at the Institutuions Card. (Is this/Are these)

credit cards with any of the institutions on the list,

or from someplace else?

IF INSTITUTIONS CARD: Which institution?

IF "SOMEPLACE ELSE": (What institution is that?/

What type of institution is that?)

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN.

1. \*Institution 1

2. \*Institution 2

3. \*Institution 3

4. \*Institution 4

5. \*Institution 5

6. \*Institution 6

7. \*Institution 7

-7. \*OTHER (Coded using the MASTER INSTITUTION LIST)

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (no credit cards: X410=5; no cards of type)

The following codes show on the screen after at

least seven distinct institutions have been during

the course of the interview:

11. \*COMMERICAL BANK; trust company

12. \*S&L/SAVINGS BANK

13. \*CREDIT UNION

15. \*STORE OR OTHER BUSINESS

50. \*DISCOVER/NOVUS

51. \*AMERICAN EXPRESS (OPTIMA/BLUE/PAY OVER TIME)

53. \*GASOLINE COMPANY

61. \*MEMBERSHIP ORG.

-7. \*OTHER

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

(#1) only: X9082 X9151 X9152 X9153 X9202 X9216 X9221 X9222

Recode: type of insitution

See MASTER INSTITIUTION LIST for codes (See X308)

0. Inap. (no credit cards: X410=5; no cards of type)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X432 Thinking only about Visa, Mastercard, Discover, American

Express cards you can pay off over time, and store cards,

do you almost always, sometimes, or hardly ever pay off the

total balance owed on the account each month?

1. \*Always or almost always

3. \*Sometimes

5. \*Hardly ever

0. Inap. (no credit cards: X410=5; no #1 or #2 cards)

X7577 (Other than the store accounts where you have credit cards,

do you have any charge or revolving charge accounts at

stores where you owed money after your last payment?/

Other than the store accounts where you have credit cards,

do you or your family living here have any charge or

revolving charge accounts at stores where you owed money

after your last payment?/

Do you have any charge or revolving charge accounts at

stores where you owed money after your last payment?/

Do you or your family living here have any charge or

revolving charge accounts at stores where you owed money

after your last payment?)

DO NOT INCLUDE ACCOUNTS WHERE R DOES NOT OWE MONEY.

1. \*YES

5. \*NO

X7576 (How many such accounts do you have where you owe money?/

How many such accounts do you or your family living here

have where you owe money?)

Code number

0. Inap. (no accounts: X7577=5)

X7575 (After the last payments were made on these accounts, what

was the balance still owed on all these accounts?/

After the last payment was made on this account, what was

the balance still owed on this account?)

WE WANT THE TOTAL AMOUNT OWED, NOT THE MINIMUM PAYMENT.

Code amount

-1. None

0. Inap. (no accounts: X7577=5)

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

PRINCIPAL RESIDENCE

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

GF

X501 INTERVIEWER CHECKPOINT: WHERE DOES R LIVE?

4. \*R LIVES ON A RANCH

5. \*R LIVES ON A FARM

2. \*R LIVES IN A MOBILE HOME/RV

3. \*R LIVES IN HOUSE/TOWNHOUSE/APT

IF R LIVES IN ANY STRUCTURE ON A FARM/RANCH, CODE

FARM OR RANCH

X6770 How many years have you (or anyone in your family here)

lived within about 25 miles of your current home?

CODE NUMBER OF YEARS

-1. \*LESS THAN A YEAR

-2. \*ENTIRE LIFE

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 95

THEN IF 95 SET TO -2

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7136 We are interested in your view of the chance

that you will be staying at your current address for the

next two years. Using any number from zero to 100, where

zero equals no chance and 100 equals absolutely certain,

what do you think the chances are that you will be living

at your current address two years from now?

INTERVIEWER: ROUND TO CLOSEST NUMBER DISPLAYED.

-1. ABSOLUTELY NO CHANCE OF STAYING (recoded from zero)

10.

20.

30.

40.

50. 50-50 CHANCE

60.

70.

80.

90.

100. ABSOLUTELY CERTAIN TO STAY

NOTE: CARD 6 contains the following information:

The numbers 0, 10, 20, ..., 100 in a horizonal row bounded

by dark lines. Below 0 is printed "Absolutely no chance";

in the space below 20 and 30 is printed "Possible but not

likely"; below 50 is printed "50-50 chance"; in the space

below 70 and 80 is printed "Likely but not certain"; and

below 100 is printed "Absolutely certain."

-----------------------------------------------------------------------------

R LIVES ON A FARM

-----------------------------------------------------------------------------

X502 Now I have some questions about this property.

About how many acres is this (farm/ranch), including any

acres that you rent or rent out to others?

INCLUDE ALL ACREAGE IN NON-CONTIGUOUS PIECES OF LAND

THAT ARE USED AS A PART OF THE FARM/RANCH OPERATION.

Code acres

0. Inap. (R does not live on farm/ranch: X501^=4 or 5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, ROUNDED TO NEAREST 5 IF

BETWEEN 10 AND 100 INCLUSIVE, OTHERWISE IF > 100

ROUNDED TO NEAREST 10 WITH A TOP-CODE AT 1000

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X503 (Do you operate a farming or ranching business on this

property?/

Do you or anyone in your family living here operate a

farming or ranching business on this property?)

(IF R CLAIMS THE FARM ON HIS INCOME TAX, THEN THE FARM IS A

BUSINESS FOR OUR PURPOSES.)

1. \*YES

5. \*NO

0. Inap. (R does not live on farm/ranch: X501^=4 or 5)

X504 (Do you rent out any part of this property to others?/

Do you or anyone in your family living here rent out any

part of this property to others?)

1. \*YES

5. \*NO

0. Inap. (R does not live on farm/ranch: X501^=4 or 5)

X505 How much rent do you collect?

Code amount

-1. None

0. Inap. (R does not live on farm/ranch: X501^=4 or 5;

R does not rent out part of property: X504=5)

X506 INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often is that amount collected?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

11. \*Twice per year

12. Every two months

31. \*Twice a month

-1. No rent collected

-7. \*Other

0. Inap. (R does not live on farm/ranch: X501^=4 or 5;

R does not rent out part of property: X504=5)

What part of this property is used for (farm/ranch)ing?

X507 Code percent \* 100

-1. \*Very little

9995. \*Almost all

0. Inap. (R does not live on farm/ranch: X501^=4 or 5;

R does not operate farm/ranch as a business: X503^=1)

X7574 Code number of acres

-1. Very little

0. Inap. (R does not live on farm/ranch: X501^=4 or 5;

R does not operate farm/ranch as a business: X503^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X508 What is the legal ownership status of this (farm/ranch)?

[Do you own this (farm/ranch), do you own part of it, do

you rent it, is it all owned by a business, or what?/

Do you or your family living here own this (farm/ranch), do

you own part of it, do you rent it, is it all owned by a

business, or what?]

1. \*Owns all

2. \*Owns only part

5. \*Sharecropper

3. \*Rents/Leases all

4. \*Owned by a business

-7. \*Other

0. Inap. (R does not live on farm/ranch: X501^=4 or 5;

R does not operate farm/ranch as a business: X503^=1)

R OWNS ALL

X509 [Does your (farm/ranch)ing business pay any rent for the

use of the property?/

Does your family's (farm/ranch)ing business pay any rent

for the use of the property?]

1. \*YES

5. \*NO

0. Inap. (R does not live on farm/ranch: X501^=4 or 5;

R does not operate farm/ranch as a business: X503^=1;

R does not own all of farm/ranch: X508^=1)

X510 (How much rent do you collect?/

How much rent do you or your family living here collect?)

Code amount

0. Inap. (R does not live on farm/ranch: X501^=4 or 5;

R does not operate farm/ranch as a business: X503^=1;

R does not own all of farm/ranch: X508^=1; business

does not pay rent: X509^=1))

X511 INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often is that amount collected?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

11. \*Twice per year

12. Every two months

31. \*Twice a month

-7. \*Other

0. Inap. (R does not live on farm/ranch: X501^=4 or 5;

R does not operate farm/ranch as a business: X503^=1;

R does not own all of farm/ranch: X508^=1; business

does not pay rent: X509^=1))

X513 Could you tell me the current value of all the land and

buildings - that is, what would it bring if it were sold

today? Do not include any farm animals, implements or crops.

Code amount

0. Inap. (R does not live on farm/ranch: X501^=4 or 5;

R does not operate farm/ranch as a business: X503^=1;

R does not own all of farm/ranch: X508^=1)

OWNED BY A BUSINESS

X514 (Do you pay the business any rent for this property?/

Do you or your family living here pay the business any rent

for this property?)

1. \*YES

5. \*NO

0. Inap. (R does not live on farm/ranch: X501^=4 or 5;

R does not operate farm/ranch as a business: X503^=1;

farm/ranch not owned by a business: X508^=4)

X515 In what month and year did you move into this (farm/ranch)?

Code month

1. \*January

2. \*February

3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (R does not live on farm/ranch: X501^=4 or 5;

R does not operate farm/ranch as a business: X503^=1;

farm/ranch not owned by a business: X508^=4)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X516 Code year (4 digits)

0. Inap. (R does not live on farm/ranch: X501^=4 or 5;

R does not operate farm/ranch as a business: X503^=1;

farm/ranch not owned by a business: X508^=4)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-60

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

R OWNS PART

X517 [Does the (farm/ranch)ing business pay you any rent for

the use of the property?/

Does the (farm/ranch)ing business pay you or your family

living here any rent for the use of the property?]

1. \*YES

5. \*NO

0. Inap. (R does not live on farm/ranch: X501^=4 or 5;

R does not operate farm/ranch as a business: X503^=1;

R does not own only part of farm/ranch: X508^=2)

X518 (How much rent do you collect?/

How much rent do you or your family living here collect?)

Code amount

0. Inap. (R does not live on farm/ranch: X501^=4 or 5;

R does not operate farm/ranch as a business: X503^=1;

R does not own only part of farm/ranch: X508^=2;

business does not pay rent to R: X517^=1)

X519 INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often is that amount collected?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

11. \*Twice per year

12. Every two months

31. \*Twice a month

-7. \*Other

0. Inap. (R does not live on farm/ranch: X501^=4 or 5;

R does not operate farm/ranch as a business: X503^=1;

R does not own only part of farm/ranch: X508^=2;

business does not pay rent to R: X517^=1)

X520 (Do you pay any rent for this property?/

Do you or anyone in your family living here pay any rent

for this property?)

1. \*YES

5. \*NO

0. Inap. (R does not live on farm/ranch: X501^=4 or 5;

R does not operate farm/ranch as a business: X503^=1;

R does not own only part of farm/ranch: X508^=2)

X521 (How much rent do you pay?/

How much rent do you or your family living here pay?)

Code amount

-1. None

0. Inap. (R does not live on farm/ranch: X501^=4 or 5;

R does not operate farm/ranch as a business: X503^=1;

R does not own only part of farm/ranch: X508^=2;

R does not pay rent to business: X520^=1)

X522 INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often is that amount paid?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

11. \*Twice per year

12. Every two months

31. \*Twice a month

-1. No rent

-7. \*Other

0. Inap. (R does not live on farm/ranch: X501^=4 or 5;

R does not operate farm/ranch as a business: X503^=1;

R does not own only part of farm/ranch: X508^=2;

R does not pay rent to business: X520^=1)

(I will ask you more about the business operation later.

Now I'd like to ask about the part of the property that

you personally own. About what percent of the total

property is that?/

I will ask you more about the business operation later.

Now I'd like to ask about the part of the property that

you and your family living here personally own. About

what percent of the total property is that?)

X523 Code percent \* 100

0. Inap. (R does not live on farm/ranch: X501^=4 or 5;

R does not operate farm/ranch as a business: X503^=1;

R does not own only part of farm/ranch: X508^=2)

X7573 Code acres

0. Inap. (R does not live on farm/ranch: X501^=4 or 5;

R does not operate farm/ranch as a business: X503^=1;

R does not own only part of farm/ranch: X508^=2)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

GF

X526 Could you tell me the current value of the entire part of

the land and buildings you own? I mean, what would it

bring if it were sold today? Do not include any farm

animals, implements or crops.

Code amount

0. Inap. (R does not live on farm/ranch: X501^=4 or 5;

R does not operate farm/ranch as a business: X503^=1;

R does not own only part of farm/ranch: X508^=2)

-----------------------------------------------------------------------------

R LIVES IN MOBILE HOME

-----------------------------------------------------------------------------

X601 (Now I have some questions about your home. Do you own

both this mobile home and site or lot, do you own only the

mobile home, do you own only the site, do you rent both

the home and site, or what?/

Now I have some questions about your home. Do you or your

family living here own both this mobile home and site or

lot, do you own only the mobile home, do you own only the

site, do you rent both the home and site, or what?)

1. \*Own both home and site

2. \*Own only site

3. \*Own only home

4. \*Rent both

-7. \*Neither own nor rent

RENTS HOME, OWNS SITE

GF

X602 How much rent do you pay on this home?

Code amount

-1. None

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=2)

GF

X603 INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often is that amount paid?)

Code frequency

2. \*Week

3. \*Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

11. \*Twice per year

12. Every two months

31. \*Twice a month

-7. \*Other

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=2)

X604 Could you tell me the current value of the site? I mean,

about what would it bring if it were sold today?

Code amount

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=2)

In what month and year did you purchase the site?

(INTERVIEWER: IF GIFT/INHERITANCE, ASK WHEN RECEIVED.)

X605 Code month

1. \*January

2. \*February

3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=2)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X606 Code year (4 digits)

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=2)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-60

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X608 CODE GIFT/INHERITANCE

1. \*GIFT/INHERITANCE

5. \*R PURCHASED

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=2)

X607 How much did this site cost when you originally acquired it?

(INTERVIEWER: IF GIFT/INHERITANCE, ASK VALUE WHEN RECEIVED.)

Code amount

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=2)

NEITHER OWNS NOR RENTS MH

X609 How is that?

1. Housing is part of job compensation; live-in

servant; housekeeper; gardener; farm laborer;

military; minister; etc.

2. Housing is a gift paid for by someone outside HU;

owned by relative outside HU; R pays only taxes/fees

3. Sold home, has not moved yet

4. Living in house which will inherit; estate in

process

5. Living in temporary quarters while home is under construction

6. Public Housing; charity

8. Living in home of relatives/friends without paying

rent; include list sample R "home from school"

9. House owned by trust created by R

10. Property owned by tribal association and R has

lifetime rights to residence; other such communal

residence rights where R has no equity interest

12. R is a part-owner

13. Not paying rent, n.e.c.

0 Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=-7)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODES 9 AND 10 ARE COMBINED

WITH CODE -7; CODES 4 AND 8 ARE COMBINED WITH CODE 2

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

In what month and year did you move into this mobile home?

X610 Code month

1. \*January

2. \*February

3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=-7)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X611 Code year (4 digits)

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=-7)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-60

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OWNS HOME, RENTS SITE

GF

X612 How much rent do you pay on this site?

Code amount

-1. None

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=3)

GF

X613 INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often is that amount paid?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

11. \*Twice per year

12. Every two months

31. \*Twice a month

-1. No rent collected

-7. \*Other

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=3)

X614 Could you tell me the current value of this mobile home?

I mean, about what would it bring if it were sold today?

Code amount

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=3)

In what month and year did you purchase this mobile home?

(INTERVIEWER: IF GIFT/INHERITANCE, ASK WHEN RECEIVED.)

X615 Code month

1. \*January

2. \*February

3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=3)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X616 Code year (4 digits)

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=3)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-60

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X618 CODE GIFT/INHERITANCE

1. \*GIFT/INHERITANCE

5. \*R PURCHASED

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=3)

X617 How much did this mobile home cost when you originally

acquired it?

INTERVIEWER: IF GIFT/INHERITANCE, ASK VALUE WHEN RECEIVED.

Code amount

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=3)

RENTS HOME AND SITE

X619 About how much rent do you pay on this home and site?

Code amount

-1. None

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=4)

X620 INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often is it paid?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

11. \*Twice per year

12. Every two months

31. \*Twice a month

-7. \*Other

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=4)

In what month and year did you move into this mobile home?

X621 Code month

1. \*January

2. \*February

3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=4)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X622 Code year (4 digits)

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=4)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-60

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OWNS HOME AND SITE

X623 Could you tell me the current value of this home and site?

I mean, about what would they bring if they were sold today?

Code amount

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=1)

X624 Were the site and mobile home purchased separately?

1. \*YES

5. \*NO

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=1)

In what month and year did you purchase this mobile home?

(INTERVIEWER: IF GIFT/INHERITANCE, ASK WHEN RECEIVED.)

X625 Code month

1. \*January

2. \*February

3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=1; home and site not purchased

separately: X624^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X626 Code year (4 digits)

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=1; home and site not purchased

separately: X624^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-60

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X628 CODE GIFT/INHERITANCE

1. \*GIFT/INHERITANCE

5. \*R PURCHASED

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=1; home and site not purchased

separately: X624^=1)

X627 How much did the mobile home cost when you originally

acquired it?

INTERVIEWER: IF GIFT/INHERITANCE, ASK VALUE WHEN RECEIVED.

Code amount

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=1; home and site not purchased

separately: X624^=1)

In what month and year did you purchase this site?

(INTERVIEWER: IF GIFT/INHERITANCE, ASK WHEN RECEIVED.)

X629 Code month

1. \*January

2. \*February

3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=1; home and site not purchased

separately: X624^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X630 Code year (4 digits)

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=1; home and site not purchased

separately: X624^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-60

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X632 CODE GIFT/INHERITANCE

1. GIFT/INHERITANCE

5. R PURCHASED

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=1; home and site not purchased

separately: X624^=1)

X631 How much did this site cost when you originally acquired it?

INTERVIEWER: IF GIFT/INHERITANCE, ASK VALUE WHEN RECEIVED.

Code amount

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=1; home and site not purchases

separately: X624^=1)

In what month and year did you purchase this mobile home and site?

(INTERVIEWER: IF GIFT/INHERITANCE, ASK WHEN RECEIVED.)

X633 Code month

1. \*January

2. \*February

3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=1; home and site purchased

separately: X624=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X634 Code year (4 digits)

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=1; home and site purchased

separately: X624=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-60

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X636 CODE GIFT/INHERITANCE

1. \*GIFT/INHERITANCE

5. \*R PURCHASED

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=1; home and site purchased

separately: X624=1)

X635 How much did the mobile home and site cost when you

originally acquired it?

INTERVIEWER: IF GIFT/INHERITANCE, ASK VALUE WHEN RECEIVED.

Code amount

0. Inap. (R does not live in MH: X501^=2; other MH

ownership: X601^=1; home and site purchased

separately: X624=1)

-----------------------------------------------------------------------------

R LIVES IN HU OTHER THAN FARM/RANCH OR MOBILE HOME

-----------------------------------------------------------------------------

X701 Now I have some questions about your home.

Do you own this ranch, do you pay rent, do you own it as a

part of a condo, co-op, townhouse association, or what?

Do you own this farm, do you pay rent, do you own it as a

part of a condo, co-op, townhouse association, or what?

Do you own this (house and lot/apartment), do you pay rent,

do you own it as a part of a condo, co-op, townhouse

association, or what?

Do you and your family living here own this ranch, do you

pay rent, do you own it as a part of a condo, co-op,

townhouse association, or what?

Do you and your family living here own this farm, do you

pay rent, do you own it as a part of a condo, co-op,

townhouse association, or what?

Do you and your family living here own this (house and

lot/apartment), do you pay rent, do you own it as a part of

a condo, co-op, townhouse association, or what?

1. \*Owns or is buying/land contract

2. \*Pays rent

3. \*Condo

4. \*Co-op

5. \*Townhouse Association

6. \*Retirement Lifetime Tenancy

8. \*OWN ONLY PART

-7. \*Neither owns nor rents

0. Inap. (R lives in MH: X501=2; R lives on farm and farm

is operated as a business: X501=4 or 5 and X503=1)

NEITHER OWNS NOR RENTS

X705 How is your housing provided?

1. Housing is part of job compensation; live-in servant;

house-keeper; gardener; farm laborer; military;

minister; etc.

2. Housing is a gift paid for by someone outside HU;

owned by relative outside HU; R pays only taxes

3. Sold home, has not moved yet

4. Living in house which will inherit; estate in process

5. Living in temporary quarters while home is under construction

6. Public Housing; charity

8. Living in home of relatives/friends without paying

rent; include list sample R "home from school"

9. House owned by trust created by R

10. Property owned by tribal association and R has

lifetime rights to residence; other such communal

residence rights where R has no equity interest

12. R is a part-owner

13. Not paying rent, n.e.c.

-7. Other

0. Inap. (R lives in MH: X501=2; R lives on farm and farm

is operated as a business: X501=4 or 5 and X503=1;

some living arrangement other than neither owns nor

rents: X701^=-7)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODES 9 AND 10 ARE COMBINED

WITH CODE -7; CODES 4 AND 8 ARE COMBINED WITH CODE 2

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7133 Do you own any part of this ranch?

Do you own any part of this farm?

Do you own any part of this (house and lot/apartment)?

Does anyone in your family living here own any part of

this (farm/ranch)?

Does anyone in your family living here own any part of

this (house and lot/apartment)?

1. \*YES

5. \*NO

0. Inap. (R lives in MH: X501=2; R lives on farm and farm

is operated as a business: X501=4 or 5 and X503=1;

some living arrangement other than neither owns nor

rents: X701^=-7)

X7134 IN THE FOLLOWING QUESTIONS ABOUT VALUE AND LOANS, INCLUDE

ONLY R'S SHARE; IF R KNOWS ONLY TOTALS FOR THE WHOLE

PROPERTY, MAKE NOTES WHERE APPLICABLE.

What percent of the property do you own?

What percent of the property do you and your family living

here own?

Code percent \* 100

0. Inap. (R lives in MH: X501=2; R lives on farm and farm

is operated as a business: X501=4 or 5 and X503=1;

some living arrangement other than neither owns nor

rents or owns only part: X701^=-7, 8; R does not own

any part: X7133=5)

In what month and year did you move into this home?

X706 Code month

1. \*January

2. \*February

3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (R lives in MH: X501=2; R lives on farm and farm

is operated as a business: X501=4 or 5 and X503=1;

some living arrangement other than neither owns nor

rents: X701^=-7; R owns any part: X7133^=5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X707 Code year (4 digits)

0. Inap. (R lives in MH: X501=2; R lives on farm and farm

is operated as a business: X501=4 or 5 and X503=1;

some living arrangement other than neither owns nor

rents: X701^=-7; R owns any part: X7133^=5)

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FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-60

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RENTS HOME (INCLUDES FARM WITH NO FARM BUSINESS/RENTED FARM)

GF

X708 How much rent do you pay for this (farm/ranch)?

How much rent do you or your family living here pay for

this (farm/ranch)?

How much rent do you pay for this (house/apartment)?

How much rent do you or your family living here pay for this

(house/apartment)?

IF RENT IS SUBSIDIZED, PROBE FOR DETAILS AND MAKE A NOTE.

IF R SHARES RENT WITH ROOMATES NOT IN THE PEU, INCLUDE

ONLY R'S (FAMILY'S) SHARE OF RENT.

Code amount

-1. None

0. Inap. (R lives in MH: X501=2; R lives on farm operated

as a business, but does not rent: X501=4 or 5 and

X503=1 and X508^=3; some living arrangement other than

rents rents: X701^=2)

X709 INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often is that amount paid?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

11. \*Twice per year

12. Every two months

31. \*Twice a month

-1. No rent collected

-7. \*Other

0. Inap. (R lives in MH: X501=2; R lives on farm operated

as a business, but does not rent: X501=4 or 5 and

X503=1 and X508^=3; some living arrangement other than

rents rents: X701^=2)

GF

X710 Does the rent include some or all utilities?

1. \*Yes, all

3. \*Yes, some

5. \*No

0. Inap. (R lives in MH: X501=2; R lives on farm operated

as a business, but does not rent: X501=4 or 5 and

X503=1 and X508^=3; some living arrangement other than

rents rents: X701^=2)

X711 Do you rent it furnished or unfurnished?

1. \*Furnished

3. \*Partially furnished

5. \*Unfurnished

0. Inap. (R lives in MH: X501=2; R lives on farm operated

as a business, but does not rent: X501=4 or 5 and

X503=1 and X508^=3; some living arrangement other than

rents rents: X701^=2)

In what month and year did you move into this ranch?

In what month and year did you move into this farm?

In what month and year did you move into this (house/apartment)?

X712 Code month

1. \*January

2. \*February

3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (R lives in MH: X501=2; R lives on farm operated

as a business, but does not rent: X501=4 or 5 and

X503=1 and X508^=3; some living arrangement other than

rents rents: X701^=2)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X713 Code year (4 digits)

0. Inap. (R lives in MH: X501=2; R lives on farm operated

as a business, but does not rent: X501=4 or 5 and

X503=1 and X508^=3; some living arrangement other than

rents rents: X701^=2)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-60

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R OWNS SOME PART (INCLUDES FARM WITH NO FARM BUSINESS)

X7572 Are you required to pay regular fees to an association or

property management group in order to live here?

1. \*YES

5. \*NO

0. Inap. (R lives in MH: X501=2; R lives on farm and farm

is operated as a business: X501=4 or 5 and X503=1;

some living arrangement other than owns: X701^=1, 3,

4, 5, 6, or 8 and X7133^=1)

X703 How much are your fees?

Code amount

-1. None

0. Inap. (R lives in MH: X501=2; R lives on farm and farm

is operated as a business: X501=4 or 5 and X503=1;

some living arrangement other than owns: X701^=1, 3,

4, 5, 6, or 8 and X7133^=1; no fees: X7572^=1)

X704 INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often do you pay this amount?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. Lump sum; one payment only

11. \*Twice per year

12. Every two months

31. \*Twice a month

-7. \*Other

0. Inap. (R lives in MH: X501=2; R lives on farm and farm

is operated as a business: X501=4 or 5 and X503=1;

some living arrangement other than owns: X701^=1, 3,

4, 5, 6, or 8 and X7133^=1; no fees: X7572^=1)

X702 INTERVIEWER OBSERVATION: DOES R LIVE IN MULTIPLE HU STRUCTURE?

(CONFIRM WITH R IF NECESSARY.)

1. \*YES

5. \*NO

0. Inap. (R lives in MH: X501=2; R lives on farm and farm

is operated as a business: X501=4 or 5 and X503=1;

some living arrangement other than owns: X701^=1, 3,

4, 5, 6, or 8 and X7133^=1)

GF

X714 Do you own the entire building or just your unit?

Do you and your family living here own the entire building

or just your unit?

IF R OWNS MULTIPLE UNITS, BUT NOT THE WHOLE BUILDING, MAKE

A NOTE AND INCLUDE ADDITIONAL UNIT LATER AS OTHER REAL

ESTATE.

1. \*Entire building

2. \*Just R's unit

0. Inap. (R lives in MH: X501=2; R lives on farm and farm

is operated as a business: X501=4 or 5 and X503=1;

some living arrangement other than owns: X701^=1, 3,

4, 5, 6, or 8 and X7133^=1)

X715 How many housing units are in this building?

Code number of units

0. Inap. (R lives in MH: X501=2; R lives on farm and farm

is operated as a business: X501=4 or 5 and X503=1;

some living arrangement other than owns: X701^=1, 3,

4, 5, or 6 and X7133^=1; does not own entire building:

X714^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 100

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7135 Do you own your unit separately from the rest of the building?

1. \*YES

5. \*NO

0. Inap. (R lives in MH: X501=2; R lives on farm and farm

is operated as a business: X501=4 or 5 and X503=1;

some living arrangement other than owns: X701^=1, 3,

4, 5, 6, or 8 and X7133^=1; does not own entire building:

X714^=1)

GF

X716 The following questions about your home refer to your unit

only.

The following questions refer to the entire building.

What is the current value of this (home and

land/apartment/property)? I mean, without taking any

outstanding loans into account, about what would it

bring if it were sold today?

INTERVIEWER: PROPERTY REFERS TO WHATEVER PART R OWNS OF

THEIR HOUSE AND LOT, APARTMENT, BUILDING, FARM OR

RANCH. INCLUDE THE PART OF THE PROPERTY THAT R OWNS; FOR

FARMS/RANCHES, INCLUDE ALL OWNED LAND AND STRUCTURES.

Code amount

0. Inap. (R lives in MH: X501=2; R lives on farm and farm

is operated as a business: X501=4 or 5 and X503=1;

some living arrangement other than owns: X701^=1, 3,

4, 5, 6, or 8 and X7133^=1)

NOTE: where X7133=YES (R neither owns nor rents, but owns

part of the property), the amount here has been adjusted to

reflect the value of the entire property.

In what month and year did you first purchase any part of

this property?

(INTERVIEWER: IF GIFT/INHERITANCE, ASK WHEN RECEIVED.)

IF THE PROPERTY WAS ACQUIRED/INHERITED/BUILT AT DIFFERENT

TIMES, RECORD THE EARLIEST DATE.

X719 Code month

1. \*January

2. \*February

3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (R lives in MH: X501=2; R lives on farm and farm

not owned at least in part: X501=4 or 5 and X508^=1 or

2; some living arrangement other than owns: X701^=1, 3,

4, 5, 6, or 8 and X7133^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X720 Code year (4 digits)

0. Inap. (R lives in MH: X501=2; R lives on farm and farm

not owned at least in part: X501=4 or 5 and X508^=1 or

2; some living arrangement other than owns: X701^=1, 3,

4, 5, 6, or 8 and X7133^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-60

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X718 CODE GIFT/INHERITANCE

1. GIFT/INHERITANCE

5. R PURCHASED

0. Inap. (R lives in MH: X501=2; R lives on farm and farm

not owned at least in part: X501=4 or 5 and X508^=1 or

2; some living arrangement other than owns: X701^=1, 3,

4, 5, 6, or 8 and X7133^=1)

GF

X7060 Did you (or your husband/wife/partner) ever own your home

in the past?

1. \*YES

5. \*NO

0. Inap. (R lives in MH: X501=2; R lives on farm and farm

is operated as a business: X501=4 or 5 and X503=1;

R owns: X701=1, 3, 4, 5, 6, or 8 and X7133^=1)

(ALL OWNERS EXCEPT MH)

X717 How much did it cost when you originally acquired it?

IF PROPERTY WAS PURCHASED SEPARATELY, WE WANT THE TOTAL

COST OF LAND AND HOUSE. INTERVIEWER: IF GIFT/INHERITANCE,

ASK VALUE WHEN RECEIVED.

Code amount

0. Inap. (R lives in MH: X501=2; R owns neither farm nor

other type of dwelling: X508^=1 or 2 and X701^=1, 3,

4, 5, 6, or 8 and X7133^=1)

(ALL TYPES OF OWNERS)

X721 What are the real estate taxes on this home and land?

What are the real estate taxes on this land?

What are the real estate taxes on this home?

What are the real estate taxes on this farm?

What are the real estate taxes on this ranch?

What are the real estate taxes on the part of the ranch you own?

What are the real estate taxes on the part of the farm you own?

What are the real estate taxes on this unit?

What are the real estate taxes on this property?

Code amount

-1. None

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1)

X722 INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often do you pay this amount?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

11. \*Twice per year

12. Every two months

20. Five times a year; every 10 weeks

22. Varies

25. Every two years

31. \*Twice a month

-7. \*Other

-1. None

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1)

X723 Is there a mortgage or land contract on this (home/home and

land/apartment/property)?

IF YES, SAY: Please do not include home equity loans or

lines of credit.

INTERVIEWER: IF R SAYS BOTH MORTGAGE AND LAND CONTRACT,

CHOOSE MORTGAGE.

IF R SAYS REVERSE ANNUITY MORTGAGE, CODE MORTGAGE AND MAKE

A NOTE [F2].

1. \*Yes, mortgage

2. \*Yes, land contract

5. \*No

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1)

X830 Do you have another mortgage or a land contract on this

property?

IF YES, SAY: Please do not include home equity lines of credit.

INTERVIEWER: A HOME EQUITY LINE OF CREDIT IS AN AGREEMENT

WHERE THE R CAN BORROW AT ANY TIME USING THE HOUSE AS

COLLATERAL, UP TO SOME LIMIT. A HOME EQUITY LOAN IS A FIXED

LENGTH, FIXED MONTHLY PAYMENT LOAN.

1. \*Yes, second mortgage

2. \*Yes, land contract

5. \*No

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723=5)

X931 Do you have any other loans that use this property as collateral?

Do you have any loans that use this property as collateral?

IF YES, SAY: Please do not include any home equity lines of credit.

1. \*YES

5. \*NO

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

first mortgage but no second mortgage: X723=1 and X830^=1)

-----------------------------------------------------------------------------

MORTGAGES/LAND CONTRACTS/EQUITY LOANS ON PRINCIPAL RESIDENCE

#1 refers to first mortgage

#2 refers to second mortgage

#3 refers to other home equity loan other than a home equity line of credit

-----------------------------------------------------------------------------

GF

X724(#1) Is the first or main mortgage a FHA, VA or other federally

guaranteed mortgage?

FANNY MAE AND FREDDY MAC SHOULD NOT BE INCLUDED AS

FEDERALLY GUARANTEED.

1. \*YES

5. NO

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no mortgage: X723=5)

X726(#1) Is it an FHA mortgage, a VA mortgage, or is it from some

other program?

1. \*Federal Housing Administration (FHA)

2. \*Veteran's Administration (VA)

3. Federal land bank

4. Federal National Mortgage Association ("Fannie Mae")

5. Federal Home Loan Mortgage Corp. ("Freddie Mac")

10. State housing programs

11. First-time buyer program, n.e.c.

12. Other Federal loan program

-7. \*Other

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no mortgage: X723=5; not federally guaranteed: X724^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODE 4 IS COMBINED WITH

CODE 5; CODES 2, 3, 10, AND 11 ARE COMBINED WITH CODE

12

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X727(#1) Why did you choose this type of loan?

Credit Terms/Cost Of Loan

1. Interest rate -- low (er) / reasonable/best available rates

4. Finance charges low (er) or none (other than interest

or NA if includes interest.)

5. Amount of the down payment

6. Size of (monthly) payments; payment amount; longer

contracts -- more time to pay off loan

9. Easier to get credit -- require less

information/collateral; less stringent rules for

giving credit; get credit approval faster; no red tape

25. Credit terms/arrangements -- NA what: "affordable terms"

26. Give the best (a better) deal -- NA how

29. Other credit terms or cost of loan

30. Special features for first-time home buyers

80. No Choice, NEC

81. Used before, always use

83. Recommended

85. Home inspection policy

90. Assumed or assumable; seller-financed

-7. Other

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no mortgage: X723=5; not federally guaranteed: X724^=1)

GF

X725(#1) Private mortgage insurance, or PMI, protects lenders

against default. Does your currently mortgage carry PMI?

(IF R ASKS: DO NOT INCLUDE MORTGAGE LIFE INSURANCE.)

1. \*YES

5. \*NO

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no mortgage: X723=5; has VA/FHA: X724=1)

About this mortgage, in what month and year did you obtain

or last refinance it?

About this land contract, in what month and year did you

obtain or last refinance it?

About this loan, in what month and year did you obtain or

last refinance it?

X801(#1) Code month

X901(#2) 1. \*January

X1001(#3) 2. \*February

3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no mortgage: X723=5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X802(#1) Code year (4 digits)

X902(#2) 0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X1002(#3) X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no mortgage: X723=5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-30

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X803(#1) Was this mortgage assumed from the previous owner?

X903(#2)

Was this land contract assumed from the previous owner?

Was this second mortgage assumed from the previous owner?

1. \*YES

5. \*NO

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no mortgage: X723=5; year of mortgage not same as year

of purchase: X802^=X606, X611, X616, X626, X630, X634,

and X720)

X7137(#1) Did you take out this mortgage to: refinance or rollover an

earlier loan, borrow additional money on your home equity,

or to do both?

1. \*Refinance or rollover an earlier loan,

2. \*Borrow additional money on your home equity,

3. \*Or to do both?

4. \*ORIGINALLY PAID CASH AND TOOK OUT LOAN LATER;

no pre-existing mortgage when loan taken out

8. Assumed mortgage when inherited the house

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

land contact: X723=2; no mortgage: X723=5; year of

mortgage same as year of purchase: X802= one of X606,

X611, X616, X626, X630, X634, or X720)

X7138(#1) How much additional money did you borrow?

INTERVIEWER: WE WANT THE AMOUNT THAT R BORROWED NET OF

CLOSING COSTS AND THE AMOUNT REFINANCED.

Code amount

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

land contact: X723=2; no mortgage: X723=5; year of

mortgage same as year of purchase: X802= one of X606,

X611, X616, X626, X630, X634, or X720; did not borrow

additional money: X7137^=2, 3; assumed mortgage on

inherited house: X7137=8)

X6723(#1) For what purpose was the money used?

MASTER LOAN PURPOSE LIST

1. Own home purchase/construction

3. Home improvements or additions (incl. assessments for

sewer/sidewalk, etc.)

4. Home repairs/maintenance/upkeep

10. Car

11. Refrigerator

12. Stove/range; microwave oven

13. Dishwasher

14. Freezer

15. Air conditioner; furnace

16. Washing machine (incl. washer/dryer combination)

17. Dryer

18. Furniture (excluding pianos and organs -- see code

34); lamps; mattress and spring combinations; rug

and/or carpet; other household furnishings

20. Vaccum cleaners

23. Home computer; calculator; computer terminal

24. Truck/jeep/utility vehicle

25. Combination of appliances (incl. TV); "appliances" -- NA type

26. Combination of furniture and appliances

29. Other appliances or durable goods; sewing machine; typewriter

31. Stereo; phonograph (may include radio); include sound

equipment; amplifiers here; radio (AM or FM); tuner;

CB equipment; tape recorder, tape player (cassette or

reel-to-reel); CD player

34. Piano; Organ

35. Musical instruments (excl. piano and organ)

36. TV -- color or black and white; "home entertainment

center" (including combination TV, radio, phonograph);

video cassette recorder/player (VCR); video camera

(Cam-corder); satellite dish

49. Other small/indoor hobby and entertainment items

(incl. pool tables and regular cameras)

50. Power tools and yard equipment

61. Boat; boating equipment (incl. trailer), airplane,

airplane equipment

63. Motorcycles; bicycle; moped; snowmobiles; off-road vehicles

65. Camper-trailers; RV, n.f.s.

67. Cottage; vacation property; mobile homes -- seasonal

residence (if current residence, code 01); "motor home";

second home

69. Other outdoor recreation items; horse

74. Invest in own business

75. Business investment (exc. 74),

incl. businesses now defunct

76. Other asset investment; bought stocks/bonds; IRA

deposit; gold; "investment", n.f.s.

78. Investment real estate (incl. cemetery plots and

additions and repairs to investment property);

farmland (exc. 74); vacation property

79. To have cash reserve

80. Divorce/separation expenses

81. Travel/vacation expenses

82. Medical/dental/veterinary expenses; attorney's fees

83. Education/school expenses

84. Tax and insurance expenses (exc. vehicle, code 93)

85. Weddings/funerals/other "occasions"

86. Legal judgment against R

88. Moving expenses

89. Other special expenses; encyclopedia; health membership

90. "Personal loan"--NA what for

91. Bill/debt consolidation; "bills"

92. Personal items, incl. clothing, jewelry

93. Vehicle repair/upkeep (incl. insurance)

94. Gifts; goods or gifts of money; "Christmas"

95. Living/general expenses

96. Loans made to others; "loaned friend/son money for a house"

97. Charitable or political contributions

-7. Other (including combinations)

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

land contact: X723=2; no mortgage: X723=5; year of

mortgage same as year of purchase: X802= one of X606, X611,

X616, X626, X630, X634, or X720; additional money not

taken out on loan: X7137^=2, 3, or 4; assumed mortgage on

inherited house: X7137=8)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

THE FOLLOWING NEW CATEGORIES HAVE BEEN CREATED FOR THE

PUBLIC DATA SET:

IF (loan purpose type=1 or 67) THEN newcode=1;

ELSE IF (loan purpose type=3 or 4) THEN newcode=2;

ELSE IF (loan purpose type=10 or 24) THEN newcode=3;

ELSE IF (loan purpose type=11, 12, 13, 14, 15, 16,

17, 18, 20, 25, 26, or 29) THEN newcode=4;

ELSE IF (loan purpose type=23, 31, 34, 35, 36, 49,

50, or 69) THEN newcode=5;

ELSE IF (loan purpose type=61, 63, or 65) THEN

newcode=6;

ELSE IF (loan purpose type=74, 75, 76, 78, or 79)

THEN newcode=7;

ELSE IF (loan purpose type=80, 81, 85, 88, or 89)

THEN newcode=8;

ELSE IF (loan purpose type=82 or 83) THEN newcode=9;

ELSE IF (loan purpose type=84, 86, 90, 91, 92, 93, 94,

95, 96, or 97) THEN newcode=10;

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GF

X804(#1) What was the amount of the land contract when you took it out?

X904(#2)

X1004(#3) Including both the amount refinanced and the additional

borrowing, how much did you borrow?

How much did you refinance?

How much did you borrow?

IF R HAS REVERSE ANNUITY MORTGAGE, THE AMOUNT BORROWED IS

THE TOTAL AMOUNT RECEIVED TO DATE.

Code amount

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2/no second mortgage:

X830^=1/no third mortgage: X931^=1 or (X723=5 and X830^=1))

GF

X805(#1) What is the amount still owed on the land contract?

X905(#2)

X1005(#3) How much is still owed on this loan?

Code amount

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, or 6 and X7133^=1;

no first mortgage: X723^=1 or 2/no second mortgage:

X830^=1/no third mortgage: X931^=1 or (X723=5 and X830^=1))

How many years or payments did you agree upon when the

(land contract/loan) was taken out or refinanced?

IF R SAYS MORTGAGE IS A REVERSE ANNUITY MORTGAGE, MAKE A NOTE.

X806(#1) NUMBER OF YEARS

X906(#2)

X1006(#3) Code number of years

-1. NO SET NUMBER OF YEARS

-7. Unable to calculate from number of payments

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2/no second mortgage:

X830^=1/no third mortgage: X931^=1 or (X723=5 and X830^=1))

X807(#1) NUMBER OF PAYMENTS

X907(#2)

X1007(#3) Code number of payments

-1. NO SET NUMBER OF PAYMENTS

-7. Unable to calculate from number of years

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2/no second mortgage:

X830^=1/no third mortgage: X931^=1 or (X723=5 and X830^=1))

X9154(#1) Recode: Term of loan in months

X9155(#2)

X9156(#3) Code number of months

-1. NO SET NUMBER OF YEARS/PAYMENTS

-7. Unable to calculate from number of payments/years

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2/no second mortgage:

X830^=1/no third mortgage: X931^=1 or (X723=5 and X830^=1))

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NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

GF

X808(#1) How much are the payments?

X908(#2)

X1008(#3) EXCLUDE TAXES AND INSURANCE, IF POSSIBLE.

Code amount

-1. None

-2. NO REGULAR PAYMENTS

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2/no second mortgage:

X830^=1/no third mortgage: X931^=1 or (X723=5 and X830^=1);

no set number of payments: X806/X906/X1006=-1 or

X807/X907/X1007=-1)

GF

X809(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X909(#2) (And how often is that amount due?)

X1009(#3)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year

12. Every two months

22. Varies

23. 13 times a year; every 4 weeks

24. Every 6 weeks

31. \*Twice a month

-1. NO PAYMENT

-2. NO REGULAR PAYMENTS

-7. \*Other

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2/no second mortgage:

X830^=1/no third mortgage: X931^=1 or (X723=5 and X830^=1);

no set number of payments: X806/X906/X1006=-1 or

X807/X907/X1007=-1)

GF

X813(#1) What is the typical payment?

X913(#2)

X1013(#3) EXCLUDE TAXES AND INSURANCE, IF POSSIBLE.

Code amount

-1. None

-2. NO TYPICAL PAYMENTS

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2/no second mortgage:

X830^=1/no third mortgage: X931^=1 or (X723=5 and X830^=1);

set number of payments and positive payment:

X806/X906/X1006^=-1 and X807/X907/X1007^=-1 and

X808/X908/X1008>0)

GF

X814(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X914(#2) (And how often is that amount made?)

X1014(#3)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year

12. Every two months

22. Varies

23. 13 times a year; every 4 weeks

24. Every 6 weeks

31. \*Twice a month

-1. NO PAYMENT

-2. NO TYPICAL PAYMENTS

-7. \*Other

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2/no second mortgage:

X830^=1/no third mortgage: X931^=1 or (X723=5 and X830^=1);

set number of payments and positive payment:

X806/X906/X1006^=-1 and X807/X907/X1007^=-1 and

X808/X908/X1008>0)

GF

X810(#1) Does this amount include real estate taxes or homeowners'

insurance? (Which?)

1. \*Taxes only

2. \*Insurance only

3. \*Both

4. \*Neither

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2; no typical payment:

X813=-1 or -2/X913=-1 or -2/X1013=-1 or -2)

GF

X811(#1) Will the (regular) payments repay the loan completely, or

X911(#2) will there be a balance payable, or "balloon" payment, when

X1011(#3) the loan is due?

IF R IS REQUIRED TO REFINANCE THE LOAN AFTER A FIXED

PERIOD, CHOOSE "BALANCE PAYABLE OR BALLOON" AND MAKE

A NOTE.

1. \*Repay completely

2. \*Balance payable or Balloon

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2/no second mortgage: X830^=1/

no third mortgage: X931^=1 or (X723=5 and X830^=1; no

typical payment: X813=-1 or -2/X913=-1 or -2/X1013=-1 or -2)

X812(#1) What will the balance due or balloon payment be?

X912(#2)

X1012(#3) Code amount

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2/no second mortgage: X830^=1/

no third mortgage: X931^=1 or (X723=5 and X830^=1; no

typical payment: X813=-1 or -2/X913=-1 or -2/

X1013=-1 or -2; no balloon payment: X811^=2/X911^=2/X1011^=2)

X7571(#1) Are you paying off this (land contract/loan) ahead of

X7570(#2) schedule, behind schedule, or are the payments about

X7569(#3) on schedule?

1. \*ON SCHEDULE

2. \*AHEAD OF SCHEDULE

3. \*BEHIND SCHEDULE

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2/no second mortgage: X830^=1/

no third mortgage: X931^=1 or (X723=5 and X830^=1;

no set number of payments: X811=-1/X911=-1/X1011=-1;

no typical payment: X813=-1 or -2/X913=-1 or -2/

X1013=-1 or -2)

X815(#1) When do you expect this (land contract/loan) to be repaid?

X915(#2)

X1015(#3) Code year (4 digits)

-1. Reverse annuity loan

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2/no second mortgage: X830^=1/

no third mortgage: X931^=1 or (X723=5 and X830^=1;

loan on schedule: X7571=1/X7570=1/X7569=1)

X816(#1) What is the current annual rate of interest being charged

X916(#2) on the loan?

X1016(#3) What is the current annual rate of interest on the land

contract?

Code percent \* 100

-1. No interest

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2/no second mortgage: X830^=1/

no third mortgage: X931^=1 or (X723=5 and X830^=1)

X817(#1) Please look at the list of institutions you wrote down.

X917(#2) Is the loan with any of the institutions on the list, or from

X1017(#3) someplace else?

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

ASK R TO UPDATE LIST IF A NEW INSTITUTION IS MENTIONED

AT THIS POINT./IF "SOMEPLACE ELSE":What type of institution

is that?)

Please look at the Institutions Card. Is the loan with any

of the institutions on the Institutions Card, or from

someplace else?

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

CHECK INSTITUTION CARD AND UPDATE IF A NEW INSTITUTION IS

MENTIONED AT THIS POINT./ IF "SOMEPLACE ELSE": What type of

institution is that?)

WE WANT THE INSTITUTION THAT CURRENTLY HOLDS THE MORTGAGE,

NOT THE INSTITUTION WHERE R ORIGINALLY TOOK OUT THE LOAN.

1. \*Institution 1

2. \*Institution 2

3. \*Institution 3

4. \*Institution 4

5. \*Institution 5

6. \*Institution 6

7. \*Institution 7

-7. \*OTHER (Coded using the MASTER INSTITUTION LIST)

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2/no second mortgage: X830^=1/

no third mortgage: X931^=1 or (X723=5 and X830^=1)

The following codes show on the screen after at

least seven distinct institutions have been during

the course of the interview:

11. \*COMMERCIAL BANK; trust company

12. \*S&L/SAVINGS BANK

14. \*FINANCE/LOAN CO

17. \*INSURANCE CO

18. \*MORTGAGE CO

19. \*CONTRACTOR/DEVELOPER

20. \*PRIOR OWNER

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X9083(#1) Recode: type of institution

X9084(#2)

X9085(#3) See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2/no second mortgage: X830^=1/

no third mortgage: X931^=1 or (X723=5 and X830^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7568(#1) Is this the same institution as the one from which you

originally took out this loan?

IF R REFINANCED THE LOAN, WE WANT TO KNOW ABOUT THE REFINANCED

LOAN, NOT THE ORIGINAL LOAN.

1. \*YES

5. \*NO

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2)

X7580(#1) Please look at the list of institutions you wrote down. Was

the loan originally with any of the institutions on that

list, or from someplace else? (IF ON THE LIST: Which

institution?) (IF SOMEPLACE ELSE: What type of institution

is that?)

Please look at the Institutions Card. Was the loan originally

with any of the institutions on the Institutions Card, or from

someplace else? (IF INSTITUTIONS CARD: Which institution?)

(IF SOMEPLACE ELSE: What type of institution is that?)

1. \*Institution 1

2. \*Institution 2

3. \*Institution 3

4. \*Institution 4

5. \*Institution 5

6. \*Institution 6

7. \*Institution 7

-7. \*OTHER (Coded using the MASTER INSTITUTION LIST)

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2; not same institution as

one from which originally took out loan: X7568^=5)

The following codes show on the screen after at

least seven distinct institutions have been during

the course of the interview:

11. \*COMMERCIAL BANK; trust company

12. \*S&L/SAVINGS BANK

14. \*FINANCE/LOAN CO

17. \*INSURANCE CO

18. \*MORTGAGE CO

19. \*CONTRACTOR/DEVELOPER

20. \*PRIOR OWNER

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X9258(#1) Recode: type of institution

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2; not same institution as

one from which originally took out loan: X7568^=5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6442(#1) Roughly, how many miles was the office of the institution

where you originally took out the loan from the home or

workplace of the person who made the application?

IF R ASKS: WE WANT THE CLOSER OF THE DISTANCE FROM HOME OR

WORKPLACE.

Code number of miles

51. \*OVER 50 MILES

992. \*FOREIGN LOCATION

-1. \*LESS THAN A MILE

-2. \*LOCATED AT WORK

-3. \*TOLL-FREE PHONE

-4. \*LOCAL POST BOX

-5. \*INTERNET/ONLINE SERVICE

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2; not same institution as

one from which originally took out loan: X7568^=5;

original institution is one already listed in the

institutions roster: X7580 in (1, 2, 3, 4, 5, 6, 7))

X819(#1) What was the most important reason you chose the original lender?

What is the most important reason you chose this lender?

(Was it because they were recommended to you, because they

had low interest rates or fees, because of the location of

their offices, because you had done other business with them,

because it was easier to qualify for the loan, or for some

other reason?)

1. \*RECOMMENDED

2. \*LOW INTEREST RATES OR FEES

3. \*LOCATION OF OFFICES

4. \*OTHER BUSINESS WITH THEM

5. \*EASY TO QUALIFY (for credit); only place that would

give us a loan

6. Many services in one place

10. Low fees/service charges

11. Personal relationship; they know me; know/like them;

R/Spouse works there

21. No choice -- assumed existing debt and lender from

previous owner

22. No choice--financed through contractor/developer/previous

owner/builder and this was their financial institution/

land contract

23. No choice, n.e.c.

24. Flexible loan terms; choice of loan terms

25. Handled VA loans/other government program

26. Participated in first time buyer program

27. Government-sponsored program, n.e.c.

32. Clear information

33. Mortgage sold to another lender

40. Current or past relationship through work, n.e.c.

-7. \*OTHER REASON

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODE 25 IS COMBINED WITH

CODE 27

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X918(#2) Was the money from this loan used for the purchase of this

X1018(#3) home or for some other purpose?

1. \*Home purchase

3. \*Home improvements

-7. \*Other (Coded using the MASTER LOAN PURPOSE LIST)

See MASTER LOAN PURPOSE LIST at X6723 for other codes

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no second mortgage: X830^=1/no third mortgage: X931^=1

or (X723=5 and X830^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER LOAN PURPOSE LIST FOR INFORMATION ON CODE

COLLAPSING FOR LOAN PURPOSE VARIABLES FOR PUBLIC

DATA SET

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GF

X820(#1) Is this an adjustable rate (land contract/loan/mortgage); that

X920(#2) is, does it have an interest rate that can rise or fall?

X1020(#3)

INCLUDE LOANS WHERE THE RATE CAN CHANGE ONLY ONCE, EVEN IF

THE CHANGE HAS ALREADY OCCURRED.

DO NOT INCLUDE RATE CHANGES DUE ONLY TO REFINANCING.

1. \*YES

5. \*NO

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2/no second mortgage: X830^=1/

no third mortgage: X931^=1 or (X723=5 and X830^=1)

X821(#1) Does the change in your interest rate depend on some other

interest rate?

1. \*YES

5. \*NO

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2; not adjustable rate: X820^=1)

GF

X7060(#1) Has the interest rate on your current (land contract/loan/mortgage)

changed since you took it out?

DO NOT INCLUDE RATE CHANGES DUE ONLY TO REFINANCING.

1. \*YES

5. \*NO

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2; not adjustable rate: X820^=1)

GF

X7061(#1) What was the interest rate on this (land contract/loan/mortgage)

when you took it out?

IF R HAS REFINANCED, WE WANT TO KNOW THE INITIAL RATE ON

THE CURRENT LOAN, NOT THE RATE ON THE ORIGINAL LOAN.

Code percent \* 100

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2; not adjustable rate: X820^=1;

interest rate not changed: X7060=5)

GF

X7062(#1) In what year can the rate first change?

Code year (4 digits)

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2; not adjustable rate: X820^=1;

interest rate has changed: X7060=1)

GF

X7063(#1) After the first change, how often can your interest rate change?

How often can your interest rate change?

IF RATE CANNOT CHANGE AGAIN, CODE ZERO

Code number of times

-1. 0 times (cannot cahnge again)

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2; not adjustable rate: X820^=1)

GF

X7064(#1) CODE FREQUENCY WITHOUT ASKING IF ALREADY MENTIONED.

Code frequency

1. Day

2. \*Week

3. \*Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*In total

11. Twice per year; every six months

12. Every two months

13. \*Every three years

15. \*Continuously floating rate; whenever rate changes

16. \*Every seven years

17. Fixed for 2 or more years, then variable annually

22. Varies

25. Every two years

26. Every four years

27. Every five years

28. Every ten years

30. At seven years

31. \*Twice a month

32. Every eight years

33. Initially fixed for 2 or more years, then variable

more frequently than annually

34. Initially fixed for 2 or more years, then variable

less frequently than annually or frequency NA

-7. \*Other

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2; not adjustable rate: X820^=1)

GF

X7065(#1) What is the most the rate can rise at any one time?

A BASIS POINT IS 1/100TH OF A PERCENTAGE POINT, SO ONE

BASIS POINT IS 0.01%.

IF R SAYS "POINTS," CLARIFY: Basis points or perecntage points?

Code percent \* 100

-2. No limit

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2; not adjustable rate:

X820^=1; interest rate changing more than once after

first time: X7023>1)

GF

X7066(#1) What was the highest level the rate could have gone up to?

WE WANT THE HIGHEST LEVEL THE RATE COULD HAVE REACHED,

NOT THE MAXIMUM ADDITIONAL AMOUNT THE RATE COULD RISE.

What is the highest level the rate can go up to over the

life of the loan?

WE WANT THE HIGHEST LEVEL THE RATE CAN REACH, NOT THE

MAXIMUM ADDITIONAL AMOUNT THE RATE COULD RISE.

Code percent \* 100

-2. No limit

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2; not adjustable rate:

X820^=1; change in rate does not depend on other rate:

X821=5; rate can change again: X7063^=-1; no limit on

rate rise: X7065=-2)

X825(#1) When the interest rate on your (land contract/loan/mortgage)

(changes, does/changed, did) the size of your monthly

payments also change?

1. \*YES

5. \*NO

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2; not adjustable rate: X820^=1)

GF

X7067(#1) Is this a convertible (land contract/loan/mortgage); that is, do

you have an option to convert it to a (land contract/loan/mortgage)

with a fixed interest rate without having to refinace it?

1. \*YES

5. \*NO

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2; not adjustable rate:

X820^=1; rate cannot change again: X7063=-1)

GF

X7068(#1) Are any of the other terms on your loan scheduled to change

over the remaining life of the loan?

DO NOT INCLUDE THE POSSIBILITY OF CHANGES DUE TO FUTURE REFINANCING.

DO NOT INCLUDE FUTURE ELIMINATION OF PAYMENTS FOR PMI (PRIVATE

MORTGAGE INSURANCE) AS A PART OF R'S REGULAR MORTGAGE PAYMENTS.

1. \*YES

5. \*NO

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2; not adjustable rate: X820^=1)

GF

X7069(#1) What terms will change and how will they change?

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no first mortgage: X723^=1 or 2; not adjustable rate:

X820^=1; other terms will not change: X7068=5)

-----------------------------------------------------------------------------

OTHER LOAN USED TO PURCHASE PROPERTY

-----------------------------------------------------------------------------

X1032 Do you owe money on any other loans used for the purchase of

this property, such as loans from relatives or the seller?

Do you owe money on any loans used for the purchase of

this property, such as loans from relatives or the seller?

Do you and your family living here owe money on any other loans

used for the purchase of this property, such as loans from

relatives or the seller?

Do you and your family living here owe money on any loans

used for the purchase of this property, such as loans from

relatives or the seller?

IF YES, SAY: Please do not include home equity lines of credit.

1. \*YES

5. \*NO

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1)

In what month and year was this loan taken out?

X1033 Code month

1. \*January

2. \*February

3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no other loan for home purchase: X1032^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X1034 Code year (4 digits)

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no other loan for home purchase: X1032^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-30

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X1035 How much was borrowed, not including finance charges?

Code amount

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no other loan for home purchase: X1032^=1)

X1036 Is this a regular installment loan where you pay a fixed

dollar amount each month for a fixed number of months until

the loan is repaid, or some other kind?

1. \*Regular installment

2. \*Other kind

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no other loan for home purchase: X1032^=1)

How many monthly payments or years were agreed upon when

the loan was received?

X1038 Code number of years

-1. No set number of years

-7. Unable to calculate from number of payments

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no other loan for home purchase: X1032^=1; not a

regular loan: X1036^=1)

X1037 Code number of payments

-1. No set number of payments

-7. Unable to calculate from number of years

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no other loan for home purchase: X1032^=1; not a

regular loan: X1036^=1)

X9160 Recode: term of loan in months

-1. No set number of years/payments

-7. Unable to calculate from number of years/payments

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no other loan for home purchase: X1032^=1; not a

regular loan: X1036^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X1039 How much are the payments?

Code amount

-1. Nothing

-2. No regular payment

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no other loan for home purchase: X1032^=1; not a

regular loan: X1036^=1; no set number of payments:

X1038=-1)

GF

X7567 INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often is that amount paid?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year

12. Every two months

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no other loan for home purchase: X1032^=1; not a

regular loan: X1036^=1; no set number of payments:

X1038=-1)

X1040 What is the typical payment?

Code amount

-1. Nothing

-2. No typical payment

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no other loan for home purchase: X1032^=1; regular

loan and regular payments: X1036=1 and X1039>0)

GF

X1041 INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often is that amount paid?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year

12. Every two months

22. Varies

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no other loan for home purchase: X1032^=1; regular

loan and regular payments: X1036=1 and X1039>0)

X7566 Are you paying off this loan ahead of schedule, behind

schedule, or are the payments about on schedule?

1. \*On schedule

2. \*Ahead of schedule

3. \*Behind schedule

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no other loan for home purchase: X1032^=1; not regular

loan: X1036^=1; no regular payment: X1039<=0)

In what month and year do you expect this loan to be repaid?

X1042 Code month

1. \*January

2. \*February

3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no other loan for home purchase: X1032^=1; payments on

schedule: X7566=1)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X1043 Code year (4 digits)

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no other loan for home purchase: X1032^=1; payments on

schedule: X7566=1)

X1044 How much is still owed on this loan?

Code amount

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no other loan for home purchase: X1032^=1)

X1045 What is the current annual rate of interest being charged

on this loan?

Code percent \* 100

-1. Nothing

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no other loan for home purchase: X1032^=1)

X1046 Please look at the list of institutions you wrote down.

Is the loan with any of the institutions on the list, or from

someplace else?

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

ASK R TO UPDATE LIST IF A NEW INSTITUTION IS MENTIONED

AT THIS POINT./IF "SOMEPLACE ELSE":What type of institution

is that?)

Please look at the Institutions Card. Is the loan with any

of the institutions on the Institutions Card, or from

someplace else?

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

CHECK INSTITUTION CARD AND UPDATE IF A NEW INSTITUTION IS

MENTIONED AT THIS POINT./ IF "SOMEPLACE ELSE": What type of

institution is that?)

1. \*Institution 1

2. \*Institution 2

3. \*Institution 3

4. \*Institution 4

5. \*Institution 5

6. \*Institution 6

7. \*Institution 7

-7. \*OTHER (Coded using the MASTER INSTITUTION LIST)

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no other loan for home purchase: X1032^=1)

The following codes show on the screen after at

least seven distinct institutions have been during

the course of the interview:

11. \*COMMERCIAL BANK; trust company

12. \*S&L/SAVINGS BANK

13. \*CREDIT UNION

14. \*FINANCE/LOAN CO

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SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

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X9086 Recode: type of institution

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no other loan for home purchase: X1032^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

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LINES OF CREDIT

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X1101 Do you have any lines of credit, not counting credit cards

or business lines of credit? Please include approved lines of

credit even if you are not currently drawing against them.

Do you have a home equity line of credit or any other lines

of credit, not counting credit cards or business lines of

credit? Please include approved lines of credit even if you

are not currently drawing against them.

Do you or anyone in your family living here have any lines

of credit, not counting credit cards or business lines of

credit? Please include approved lines of credit even if you

are not currently drawing against them.

Do you or anyone in your family living here have a home

equity line of credit or any other lines of credit, not

counting credit cards or business lines of credit? Please

include approved lines of credit even if you are not currently

drawing against them.

SIMILARLY TO A CREDIT CARD AGREEMENT, A LINE OF CREDIT

ALLOWS A PERSON TO BORROW AS THEY SEE FIT UP TO A MAXIMUM LIMIT.

A HOME EQUITY LINE OF CREDIT IS A LINE OF CREDIT SECURED BY

THE EQUITY IN A HOME.

INCLUDE CHECKING ACCOUNT OVERDRAFT PROTECTION.

1. \*YES

5. \*NO

X1102 How many lines of credit do you have?

How many lines of credit do you and your family living here

have?

Code number

0. Inap. (no lines of credit: X1101=5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 5

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6686 Originally reported value of X1102 (see introduction)

Code number

0. Inap. (no lines of credit: X1101=5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 5

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#1 refers to first line of credit

#2 refers to second line of credit

#3 refers to third line of credit

#4 refers to all remaining lines of credit

-----------------------------------------------------------------------------

X1103(#1) Is this line of credit secured by the equity in your home?

X1114(#2)

X1125(#3) Is the largest line of credit secured by the equity in your home?

Is the next line of credit secured by the equity in your home?

1. \*YES

5. \*NO

0. Inap. (no lines of credit: X1101=5/no second line of

credit: X1102<2/no third line of credit: X1102<3;

does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and

X7133^=1)

X1105(#1) Do you currently owe any money on this line?

X1116(#2)

X1127(#3)

1. \*YES

5. \*NO

0. Inap. (no lines of credit: X1101=5/no second line of

credit: X1102<2/no third line of credit: X1102<3)

X7141(#1) How much did you borrow the most recent time you used this

X7142(#2) line?

X7143(#3)

Code amount

0. Inap. (no lines of credit: X1101=5/no second line of

credit: X1102<2/no third line of credit: X1102<3;

not currently borrowing: X1105^=1/X1116^=1/X1127^=1)

X1106(#1) What was the money used for? (What was its major use?)

X1117(#2)

X1128(#3) See MASTER LOAN PURPOSE LIST at X6723.

0. Inap. (no lines of credit: X1101=5/no second line of

credit: X1102<2/no third line of credit: X1102<3;

not currently borrowing: X1105^=1/X1116^=1/X1127^=1)

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SEE MASTER LOAN PURPOSE LIST FOR INFORMATION ON CODE

COLLAPSING FOR LOAN PURPOSE VARIABLES FOR PUBLIC

DATA SET

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X1108(#1) How much is currently owed?

X1119(#2)

X1130(#3) Code amount

0. Inap. (no lines of credit: X1101=5/no second line of

credit: X1102<2/no third line of credit: X1102<3;

not currently borrowing: X1105^=1/X1116^=1/X1127^=1)

X1109(#1) What is the typical payment?

X1120(#2)

X1131(#3) Code amount

-1. Nothing

-2. No typical payment

0. Inap. (no lines of credit: X1101=5/no second line of

credit: X1102<2/no third line of credit: X1102<3;

not currently borrowing: X1105^=1/X1116^=1/X1127^=1)

X1110(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X1121(#2) (And how often is it made?)

X1132(#3)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year

12. Every two months

22. Varies

31. \*Twice a month

-1. NO PAYMENT

-2. NO TYPICAL PAYMENTS

-7. \*Other

0. Inap. (no lines of credit: X1101=5/no second line of

credit: X1102<2/no third line of credit: X1102<3;

not currently borrowing: X1105^=1/X1116^=1/X1127^=1)

X1111(#1) What is the current annual rate of interest being charged

X1122(#2) on this loan?

X1133(#3)

Code percent \* 100

-1. Nothing

0. Inap. (no lines of credit: X1101=5/no second line of

credit: X1102<2/no third line of credit: X1102<3;

not currently borrowing: X1105^=1/X1116^=1/X1127^=1)

X1112(#1) Please look at the list of institutions you wrote down.

X1123(#2) Is this line of credit with any of the institutions on the

X1134(#3) list, or from someplace else?

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

ASK R TO UPDATE LIST IF A NEW INSTITUTION IS MENTIONED

AT THIS POINT./IF "SOMEPLACE ELSE":What type of institution

is that?)

Please look at the Institutions Card. Is this line of

credit with any of the institutions on the Institutions

Card, or from someplace else?

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

CHECK INSTITUTION CARD AND UPDATE IF A NEW INSTITUTION IS

MENTIONED AT THIS POINT./ IF "SOMEPLACE ELSE": What type of

institution is that?)

1. \*Institution 1

2. \*Institution 2

3. \*Institution 3

4. \*Institution 4

5. \*Institution 5

6. \*Institution 6

7. \*Institution 7

-7. \*OTHER (Coded using the MASTER INSTITUTION LIST)

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (no lines of credit: X1101=5/no second line of

credit: X1102<2/no third line of credit: X1102<3)

The following codes show on the screen after at

least seven distinct institutions have been during

the course of the interview:

11. \*COMMERCIAL BANK; trust company

12. \*S&L/SAVINGS BANK

14. \*FINANCE/LOAN CO

16. \*BROKERAGE

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

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X9087(#1) Recode: type of institution

X9088(#2)

X9089(#3) See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (no lines of credit: X1101=5/no second line of

credit: X1102<2/no third line of credit: X1102<3)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

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X1104(#1) (Including what you owe now,) what is the maximum amount

X1115(#2) you could owe on this line of credit? That is, what is

X1126(#3) your total credit limit on this line?

INTERVIEWER: WE WANT THE TOTAL OF WHAT IS OWED NOW AND

THE REMAINING AMOUNT OF CREDIT AVAILABLE ON THE LINE.

Code amount

-1, DRAW PERIOD OVER

0. Inap. (no lines of credit: X1101=5/no second line of

credit: X1102<2/no third line of credit: X1102<3)

X1136(#4) What is the total amount that you currently owe on all

other remaining lines of credit?

What is the total amount that you and your family living

here currently owe on all other remaining lines of credit?

Code amount

-1. Nothing

0. Inap. (no lines of credit: fewer than four lines

credit: X1102<4)

X8401(#4) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (Does not have any lines of credit: X1101=5;

fewer than four lines of credit: X1102<4; did

break off early in grid)

-----------------------------------------------------------------------------

HOME IMPROVEMENTS

-----------------------------------------------------------------------------

X1201 Have you ever made any major additions or done extensive

remodeling to this property?

Have you and your family living here ever made any major

additions or done extensive remodeling to this property?

1. \*YES

5. \*NO

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1)

X1202 Roughly what was the total cost of all remodeling or

additions to this property?

Code amount

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no improvements: X1201^=1)

X1203 Other than what I have already recorded, do you owe any

money on loans taken out for these projects?

Other than what I have already recorded, do you or your

family living here owe any money on loans taken out for

these projects?

1. \*YES

5. \*NO

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no improvements: X1201^=1)

In what month and year was the most recent loan taken out?

X1204 Code month

1. \*January

2. \*February

3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no improvements: X1201^=1; no home improvement loan:

X1203^=1)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X1205 Code year (4 digits)

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no improvements: X1201^=1; no home improvement loan:

X1203^=1)

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FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-30

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X1206 How much was borrowed, not including finance charges?

Code amount

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no improvements: X1201^=1; no home improvement loan:

X1203^=1)

X1207 Is this a regular installment loan where you pay a fixed

dollar amount each month for a fixed number of months until

the loan is repaid, or some other kind?

1. \*Regular installment

2. \*Other kind

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no improvements: X1201^=1; no home improvement loan:

X1203^=1)

How many monthly payments or years were agreed upon when

the loan was received?

X1209 Code number of years

-1. No set number of years

-7. Unable to calculate from number of payments

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no improvements: X1201^=1; no home improvement loan:

X1203^=1; not a regular loan: X1207^=1)

X1208 Code number of payments

-1. No set number of payments

-7. Unable to calculate from number of years

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no improvements: X1201^=1; no home improvement loan:

X1203^=1; not a regular loan: X1207^=1)

X9161 Recode: term of loan in months

-1. No set number of years/payments

-7. Unable to calculate from number of years/payments

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no improvements: X1201^=1; no home improvement loan:

X1203^=1; not a regular loan: X1207^=1)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X1210 How much are the payments?

Code amount

-1. Nothing

-2. No regular payment

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no improvements: X1201^=1; no home improvement loan:

X1203^=1; not a regular loan: X1207^=1;

no set number of payments: X1209=-1)

X7565 INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often are they made?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year

12. Every two months

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no improvements: X1201^=1; no loan for home

improvements: X1203^=1; not a regular loan: X1207^=1;

no set number of payments: X1209=-1)

X1211 What is the typical payment?

Code amount

-1. Nothing

-2. No typical payment

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no improvements: X1201^=1; no loan for home

improvements: X1203^=1; not a regular loan and regular

payments: X1210>0)

X1212 INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often is it made?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year

12. Every two months

22. Varies

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no improvements: X1201^=1; no loan for home

improvements: X1203^=1; not a regular loan and regular

payments: X1210>0)

X7564 Are you paying off this loan ahead of schedule, behind

schedule, or are the payments about on schedule?

1. \*On schedule

2. \*Ahead of schedule

3. \*Behind schedule

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no improvements: X1201^=1; no loan for home

improvements: X1203^=1; not a regular loan: X1207^=1;

no regular payment: X1210<=0)

In what month and year do you expect this loan to be repaid?

X1213 Code month

1. \*January

2. \*February

3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no improvements: X1201^=1; no loan for home

improvements: X1203^=1; payments on schedule: X7564=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X1214 Code year (4 digits)

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no improvements: X1201^=1; no loan for home

improvements: X1203^=1; payments on schedule: X7564=1)

X1215 How much is still owed on this loan?

Code amount

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no improvements: X1201^=1; no loan for home

improvements: X1203^=1)

X1216 What is the current annual rate of interest being charged

on this loan?

Code percent \* 100

-1. Nothing

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no improvements: X1201^=1; no loan for home

improvements: X1203^=1)

X1217 Please look at the list of institutions you wrote down.

Is the loan with any of the institutions on the list, or from

someplace else?

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

ASK R TO UPDATE LIST IF A NEW INSTITUTION IS MENTIONED

AT THIS POINT./IF "SOMEPLACE ELSE":What type of institution

is that?)

Please look at the Institutions Card. Is the loan with any

of the institutions on the Institutions Card, or from

someplace else?

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

CHECK INSTITUTION CARD AND UPDATE IF A NEW INSTITUTION IS

MENTIONED AT THIS POINT./ IF "SOMEPLACE ELSE": What type of

institution is that?)

1. \*Institution 1

2. \*Institution 2

3. \*Institution 3

4. \*Institution 4

5. \*Institution 5

6. \*Institution 6

7. \*Institution 7

-7. \*OTHER (Coded using the MASTER INSTITUTION LIST)

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no improvements: X1201^=1; no loan for home

improvements: X1203^=1)

The following codes show on the screen after at

least seven distinct institutions have been during

the course of the interview:

11. \*COMMERCIAL BANK

12. \*S&LSAVINGS BANK

13. \*CREDIT UNION

14. \*FINANCE/LOAN CO

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X9090(#1) Recode: type of institution

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and X7133^=1;

no improvements: X1201^=1; no loan for home

improvements: X1203^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X1218 Do you owe money on more than one loan for home additions

or improvements to this property?

1. \*YES

5. \*NO

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and

X7133^=1; no improvements: X1201^=1; no home

improvement loan: X1203^=1)

X1219 Altogether, how much is still owed on all other loans for

additions or improvements to this property?

Code amount

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and

X7133^=1; no improvements: X1201^=1; no home

improvement loan: X1203^=1; no additional home

improvement loans: X1218^=1)

X1220 Altogether, how much are the payments?

Code amount

-1. None

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and

X7133^=1; no improvements: X1201^=1; no home

improvement loan: X1203^=1; no additional home

improvement loans: X1218^=1)

X1221 INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often are they made?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year

12. Every two months

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and

X7133^=1; no improvements: X1201^=1; no home

improvement loan: X1203^=1; no additional home

improvement loans: X1218^=1)

-----------------------------------------------------------------------------

RENT OUT ANY PORTION OF PROPERTY

-----------------------------------------------------------------------------

X1223 Do you rent out any portion of this (house or

lot/apartment/mobile/home/building) to others?

1. \*YES

5. \*NO

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and

X7133^=1)

X1224 How much rent do you collect?

Code amount

-1. Nothing

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and

X7133^=1; does not rent part of home: X1223^=1)

X1225 INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often is that amount collected?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

11. \*Twice per year

12. Every two months

31. \*Twice a month

-1. No rent collected

-7. \*Other

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and

X7133^=1; does not rent part of home: X1223^=1)

X1226 Have you (OR your [husband/wife/partner]) ever owned a home

before this one?

1. \*YES

5. \*NO

0. Inap. (Does not own any part of HU: X508^=1 or 2 and

X601^=1, 2, or 3 and X701^=1, 3, 4, 5, 6, or 8 and

X7133^=1)

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

LAND CONTRACTS AND NOTES GIVEN BY R

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

X1401 Have you ever sold any real estate for which you loaned

money to the buyer? Please include accepting a note, land

contract, or mortgage from the buyer.

Have you or anyone in your family living here ever sold

any real estate for which you loaned money to the buyer?

Please include accepting a note, land contract, or mortgage

from the buyer.

1. \*YES

5. \*NO

X1402 Does the buyer still owe you money on any of these notes,

land contracts, or mortgages?

Does the buyer still owe your family money on any of these

notes, land contracts, or mortgages?

1. \*YES

5. \*NO

0. Inap. (Never made any such loans: X1401=5)

X1403 Altogether, on how many such loans are you owed money?

Altogether, on how many such loans is your family owed money?

Code number

0. Inap. (Never made any such loans: X1401=5; no such

loans currently: X1402^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 15

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6687 Originally reported value of X1403 (see introduction)

Code number

0. Inap. (Never made any such loans: X1401=5; no such

loans currently: X1402^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 15

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-----------------------------------------------------------------------------

#1 refers to first loan

#2 refers to second loan

#3 refers to third loan

#4 refers to all remaining loans

-----------------------------------------------------------------------------

X1404(#1) About this loan, is it a land contract, a mortgage, or

X1504(#2) something else?

X1604(#3)

About the largest loan, is it a land contract, a mortgage,

or something else?

About the next largest loan, is it a land contract, a

mortgage, or something else?

1. \*land contract/lease purchase

2. \*mortgage

3. \*something else/other type of personal loan

0. Inap. (Never made any such loans: X1401=5; no such

loans currently: X1402^=1/fewer than 2 loans: X1403<2/

fewer than 3 loans: X1403<3)

X1405(#1) How much are you owed on this note?

X1505(#2)

X1605(#3) How much are you and your family owed on this note?

Code amount

0. Inap. (Never made any such loans: X1401=5; no such

loans currently: X1402^=1/fewer than 2 loans: X1403<2/

fewer than 3 loans: X1403<3; loan is land contract or

mortgage: X1401=1 or 2/X1504=1 or 2/X1604=1 or 2)

In what month and year was this loan taken out?

X1406(#1) Code month

X1506(#2) 1. \*January

X1606(#3) 2. \*February

3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (Never made any such loans: X1401=5; no such

loans currently: X1402^=1/fewer than 2 loans: X1403<2/

fewer than 3 loans: X1403<3; loan is not land contract

or mortgage: X1401^=1 or 2/X1504^=1 or 2/X1604^=1 or 2)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X1407(#1) Code year (4 digits)

X1507(#2) 0. Inap. (Never made any such loans: X1401=5; no such

X1607(#3) loans currently: X1402^=1/fewer than 2 loans: X1403<2/

fewer than 3 loans: X1403<3; loan is not land contract

or mortgage: X1401^=1 or 2/X1504^=1 or 2/X1604^=1 or 2)

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FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-30

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X1408(#1) How much money did you lend the borrower?

X1508(#2)

X1608(#3) How much money did your family lend the borrower?

Code amount

0. Inap. (Never made any such loans: X1401=5; no such

loans currently: X1402^=1/fewer than 2 loans: X1403<2/

fewer than 3 loans: X1403<3; loan is not land contract

or mortgage: X1401^=1 or 2/X1504^=1 or 2/X1604^=1 or 2)

X1409(#1) How much is still owed on this loan?

X1509(#2)

X1609(#3) Code amount

0. Inap. (Never made any such loans: X1401=5; no such

loans currently: X1402^=1/fewer than 2 loans: X1403<2/

fewer than 3 loans: X1403<3; loan is not land contract

or mortgage: X1401^=1 or 2/X1504^=1 or 2/X1604^=1 or 2)

X1410(#1) How much are the loan payments?

X1510(#2)

X1610(#3) Code amount

-1. Nothing

-2. No regular payments

0. Inap. (Never made any such loans: X1401=5; no such

loans currently: X1402^=1/fewer than 2 loans: X1403<2/

fewer than 3 loans: X1403<3; loan is not land contract

or mortgage: X1401^=1 or 2/X1504^=1 or 2/X1604^=1 or 2)

X1411(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X1511(#2) (And how often is that amount paid?)

X1611(#3)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year

12. Every two months

22. Varies

31. \*Twice a month

-1. Nothing

-2. No regular payments

-7. \*Other

0. Inap. (Never made any such loans: X1401=5; no such

loans currently: X1402^=1/fewer than 2 loans: X1403<2/

fewer than 3 loans: X1403<3; loan is not land contract

or mortgage: X1401^=1 or 2/X1504^=1 or 2/X1604^=1 or 2)

When the loan was taken out, was it agreed upon that there

were going to be a number of years , a number of payments,

or was there no set number of years or payments?

X1412(#1) Code number of years

X1512(#2) -1. No set number of years

X1612(#3) 0. Inap. (Never made any such loans: X1401=5; no such

loans currently: X1402^=1/fewer than 2 loans: X1403<2/

fewer than 3 loans: X1403<3; loan is not land contract

or mortgage: X1401^=1 or 2/X1504^=1 or 2/X1604^=1 or 2;

number of payments given: X1413>0/X1513>0/X1613>0)

X1413(#1) Code number of payments

X1513(#2) -1. No set number of payments

X1613(#3) 0. Inap. (Never made any such loans: X1401=5; no such

loans currently: X1402^=1/fewer than 2 loans: X1403<2/

fewer than 3 loans: X1403<3; loan is not land contract

or mortgage: X1401^=1 or 2/X1504^=1 or 2/X1604^=1 or 2;

number of years given: X1412>0/X1512>0/X1612>0)

GF

X1414(#1) Will the regular payments pay off the loan completely or

X1514(#2) will there be a balance payable or "balloon" when the loan

X1614(#3) is due?

IF R IS REQUIRED TO REFINANCE THE LOAN AFTER A FIXED

PERIOD, CHOOSE "BALANCE PAYABLE OR BALLOON" AND MAKE

A NOTE.

1. \*REPAID COMPLETELY

5. \*BALANCE PAYABLE OR BALLOON

0. Inap. (Never made any such loans: X1401=5; no such

loans currently: X1402^=1/fewer than 2 loans: X1403<2/

fewer than 3 loans: X1403<3; loan is not land contract

or mortgage: X1401^=1 or 2/X1504^=1 or 2/X1604^=1 or 2;

no set number of payments: X1413=-1/X1513=-1/X1613=-1)

X1415(#1) What will the balance payable or balloon payment be?

X1515(#2)

X1615(#3) Code amount

0. Inap. (Never made any such loans: X1401=5; no such

loans currently: X1402^=1/fewer than 2 loans: X1403<2/

fewer than 3 loans: X1403<3; loan is not land contract

or mortgage: X1401^=1 or 2/X1504^=1 or 2/X1604^=1 or 2;

no set number of payments: X1413=-1/X1513=-1/X1613=-1;

no balloon payment: X1414^=5/X1514^=5/X1614^=5)

X1416(#1) Do you still owe any money on loans for this property?

X1516(#2)

X1616(#3) Do you or your family living here still owe any money

on loans for this property?

1. \*YES

5. \*NO

0. Inap. (Never made any such loans: X1401=5; no such

loans currently: X1402^=1/fewer than 2 loans: X1403<2/

fewer than 3 loans: X1403<3)

X1417(#1) How much do you still owe?

X1517(#2)

X1617(#3) Code amount

0. Inap. (Never made any such loans: X1401=5; no such

loans currently: X1402^=1/fewer than 2 loans: X1403<2/

fewer than 3 loans: X1403<3; R owes no money on property

X1416^=1/X1516^=1/X1616^=1)

X1619(#4) About how much in total is owed to you on the remaining

notes, land contracts, or mortgages?

About how much in total is owed to your family on the

remaining notes, land contracts, or mortgages?

Code amount

0. Inap. (Never made any such loans: X1401=5; no such

loans currently: X1402^=1; fewer than 4 loans: X1403<4)

X8402(#4) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (Never made any such loans: X1401=5; no such

loans currently: X1402^=1; did not break off early in

grid)

X1620(#4) Do you still owe any money on loans for these other

properties?

Do you or your family here still owe any money on loans

for these other properties?

1. \*YES

5. \*NO

0. Inap. (Never made any such loans: X1401=5; no such

loans currently: X1402^=1; fewer than 4 loans: X1403<4)

X8403(#4) Original value for Rs who did not provide complete

information within the grid structure (see introduction)

1. \*YES

5. \*NO

0. Inap. (Never made any such loans: X1401=5; no such

loans currently: X1402^=1; did not break off early in

grid)

X1621(#4) Altogether how much do you still owe?

Altogether how much does your family still owe?

Code amount

0. Inap. (Never made any such loans: X1401=5; no such

loans currently: X1402^=1; fewer than 4 loans: X1403<4;

R owes no money on properties: X1620^=1)

X8404(#4) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (Never made any such loans: X1401=5; no such

loans currently: X1402^=1; did not break off early in

grid; no money owed on properties underlying loans:

X8403^=1)

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INVESTMENT REAL ESTATE AND VACATION PROPERTIES

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-----------------------------------------------------------------------------

X1700 Do you own any (other) real estate such as a lot, vacation

home, timeshare, apartment building, commercial property, or

other investment property, including properties owned in

partnership with other people?

Do you or anyone in your family living here own any (other)

real estate such as a lot, vacation home, timeshare,

apartment building, commercial property, or other investment

property, including properties owned in partnership with

other people?

1. \*YES

5. \*NO

X7555 Are any of these properties owned by a business?

(IF YES, SAY: I'll ask about those properties later).

1. \*YES

5. \*NO

0. Inap. (No properties: X1700=5)

X1701 How many properties that are not owned by a business do

you own or have an interest in?

How many properties that are not owned by a business do you

and your family living here own or have an interest in?

Earlier you told me you own your home separately from the

other unit you own on the property. Please include the

rest of the property here.

RECORD DETAILS FOR EACH PROPERTY SEPARATELY.

EXCEPTION: TREAT PARCELS OF LAND OR GROUPS OF BUILDINGS

MANAGED TOGETHER AS ONE PROPERTY, IF THAT IS EASIER FOR R.

Code number

-1. None

0. Inap. (No properties: X1700=5)

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FOR THE PUBLIC DATA SET, TOP-CODED AT 20

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X6688 Originally reported value of X1701 (see introduction)

Code number

-1. None

0. Inap. (No properties: X1700=5)

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FOR THE PUBLIC DATA SET, TOP-CODED AT 20

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-----------------------------------------------------------------------------

#1 refers to first property

#2 refers to second property

#3 refers to third property

#4 refers to all remaining vacation properties

#5 refers to all remaining properties other than vacation properties

-----------------------------------------------------------------------------

X1703(#1) I would like to ask first about the property where you live.

X1803(#2) In the questions that follow, please give me the amounts

X1903(#3) for the building excluding your unit.

I would like to ask first about the most valuable property.

About the property.....

About the next most valuable property.....

What type of property is this?

IF PROPERTY IS RESIDENTIAL, PROBE FOR NUMBER OF UNITS.

10. Farm/Ranch -- any mention

11. Land only: Lot, tract, acreage; building lots; "farmland"

12. Substantial land and seasonal or other residence (except 14)

13. Substantial land and some other type of structure

14. Substantial land and trailer/mobile home

15. Recreational property; sports field; golf course

21. Seasonal/vacation house (winter/summer home; cottage;

etc.); other additional home

22. Trailer/Mobile Home

24. Mobile home park

25. Time-share ownership -- any

40. One single family house

41. Multiple single family houses

42. Duplex 2 unit residence

43. Triplex - 3 unit residence

44. Fourplex - 4 unit residence

45. 5 or more unit residence

46. "Apartment house" -- # of units unknown; "rental units" or

"property", n.f.s.

47. Other business/commercial property (exc. 41-46, 48)

48. Business/commercial and residential combination

49. Condominium; co-op

50. Residential, n.e.c.

51. Garage

52. Burial lot

999. Misc. vacation property mapped from mop-up question

-7. Other, including combination of types on one

property (except for code 48)

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODES 13, 14, AND 22

ARE COMBINED WITH CODE 12; CODE 24 IS COMBINED

WITH CODE 50; CODE 25 IS COMBINED WITH CODE 21;

CODES 43 AND 44 COMBINED WITH CODE 42; CODES 48 AND

15 ARE COMBINED WITH CODE 47; CODE 46 IS COMBINED WITH

CODE 45; CODE 52 IS COMBINED WITH CODE -7

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X1704(#1) Is this property owned by you, is it owned jointly with

X1804(#2) others, owned by a partnership, is it a timeshare, or what?

X1904(#3)

Is this property owned by you and your family living here,

is it owned jointly with others, owned by a partnership,

is it a timeshare, or what?

1. \*OWNED BY R OR FAMILY LIVING HERE

2. \*OWNED JOINTLY

3. \*PARTNERSHIP; limited partnership

5. \*TIMESHARE

8. Property moved from mopup and assumed to be all R's (value

collected in mopup is R's share)

10. Corporation NEC

11. Trust, n.e.c. or not specified

12. Limited liability Company (LLC)

13. Lease hold or other very long-term control of property, n.e.c.

-7. \*OTHER

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3)

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FOR THE PUBLIC DATA SET, CODE 13 IS COMBIMED WITH

CODE 11

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X1705(#1) What percentage of the property do you own?

X1805(#2)

X1905(#3) What percentage of the property do you and your family

living here own?

Code percent \* 100

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3)

NOTE: For timeshares, ownership is always taken as 100 percent.

X1706(#1) How much in total is this timeshare worth?

X1806(#2)

X1906(#3) How much in total is this property worth?

I mean, without taking any outstanding loans into account,

what would it bring if it were sold today?

INTERVIEWER: WE WANT THE TOTAL VALUE OF THE PROPERTY, NOT

JUST R'S SHARE. (asked if property not a time share)

Code amount

-1. Nothing

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3)

In what month and year did you first purchase this property?

In what month and year did you first purchase any part of

this property?

In what month and year did you first purchase this timeshare?

(INTERVIEWER: IF GIFT/INHERITANCE, ASK WHEN RECEIVED.)

IF THE PROPERTY WAS ACQUIRED/INHERITED/BUILT AT DIFFERENT

TIMES, RECORD THE EARLIEST DATE.

X1707(#1) Code month

X1807(#2) 1. \*January

X1907(#3) 2. \*February

3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X1708(#1) Code year (4 digits)

X1808(#2) 0. Inap. (No properties: X1700=5; no properties not owned

X1908(#3) by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3)

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FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-60

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X1710(#1) CODE GIFT/INHERITANCE

X1810(#2) 1. \*GIFT/INHERITANCE

X1910(#3) 5. \*R PURCHASED

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3)

X1709(#1) What was the value of the property when received?

X1809(#2)

X1909(#3) What was the purchase price of your timeshare?

What was the total purchase price?

Code amount

-1. Nothing

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3)

X1711(#1) Are there any outstanding loans or mortgages on this property?

X1811(#2)

X1911(#3) Are there any outstanding loans or mortgages on this timeshare?

1. \*YES

5. \*NO

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3)

In what month and year did you obtain or last refinance the loan?

IF R ASSUMED/REFINANCED THE LOAN, RECORD THE DATE ASSUMED/REFINANCED.

X1712(#1) Code month

X1812(#2) 1. \*January

X1912(#3) 2. \*February

3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3; no loan on property:

X1711^=1/X1811^=1/X1911^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X1713(#1) Code year (4 digits)

X1813(#2) 0. Inap. (No properties: X1700=5; no properties not owned

X1913(#3) by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3; no loan on property:

X1711^=1/X1811^=1/X1911^=1)

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FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-30

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X1714(#1) How much was borrowed or refinanced for your timeshare?

X1814(#2)

X1914(#3) In total, how much was borrowed or refinanced?

Code amount

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3; no loan on property:

X1711^=1/X1811^=1/X1911^=1)

X1715(#1) How much is still owed?

X1815(#2)

X1915(#3) In total, how much is still owed?

Code amount

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3; no loan on property:

X1711^=1/X1811^=1/X1911^=1)

How many years or what number of payments were agreed upon

when the loan was taken out?

In total, how many years or what number of payments were

agreed upon when the loan was taken out?

X1716(#1) Code number of years

X1816(#2) -1. No set number of years

X1916(#3) -7. Unable to calculate from number of payments

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3; no loan on property:

X1711^=1/X1811^=1/X1911^=1)

X1717(#1) Code number of payments

X1817(#2) -1. No set number of payments

X1917(#3) -7. Unable to calculate from number of years

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3; no loan on property:

X1711^=1/X1811^=1/X1911^=1)

X9157(#1) Recode: Term of loan in months

X9158(#2)

X9159(#3) Code months

-1. No set number of years/payments

-7. Unable to calculate from number of payments/years

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3; no loan on property:

X1711^=1/X1811^=1/X1911^=1)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X1718(#1) How much are the payments?

X1818(#2)

X1918(#3) In total, how much are the payments?

EXCLUDE TAXES, INSURANCE, IF POSSIBLE.

Code amount

-1. Nothing

-2. No regular payments

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3; no loan on property:

X1711^=1/X1811^=1/X1911^=1; no set number of payments:

X1716=-1/X1816=-1/X1916=-1)

X1719(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X1819(#2) (And how often is that amount paid?)

X1919(#3)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year

12. Every two months

22. Varies

23. 13 times a year; every 4 weeks

24. Every 6 weeks

31. \*Twice a month

-1. NO PAYMENT

-2. NO REGULAR PAYMENTS

-7. \*Other

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3; no loan on property:

X1711^=1/X1811^=1/X1911^=1; no set number of payments:

X1716=-1/X1816=-1/X1916=-1)

X1723(#1) What is the typical payment?

X1823(#2)

X1923(#3) EXCLUDE TAXES, INSURANCE, IF POSSIBLE.

Code amount

-1. None

-2. NO TYPICAL PAYMENTS

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3; no loan on property:

X1711^=1/X1811^=1/X1911^=1; set number of payments and

positive amount of payments: X1716^=-1 and X1718>0/

/X1816^=-1 ad X1818>0/X1916^=-1 and X1918>0)

X1724(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X1824(#2) (And how often is it made?)

X1924(#3)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. Twice per year

12. Every two months

22. Varies

23. 13 times a year; every 4 weeks

24. Every 6 weeks

31. \*Twice a month

-1. NO PAYMENT

-2. NO TYPICAL PAYMENTS

-7. \*Other

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3; no loan on property:

X1711^=1/X1811^=1/X1911^=1; set number of payments and

positive amount of payments: X1716^=-1 and X1718>0/

/X1816^=-1 ad X1818>0/X1916^=-1 and X1918>0)

X1720(#1) Does this amount include property taxes or insurance?

X1820(#2)

X1920(#3) INTERVIEWER: PROBE FOR WHICH.

1. \*TAXES ONLY

2. \*INSURANCE ONLY

3. \*BOTH

4. \*NEITHER

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3; no loan on property:

X1711^=1/X1811^=1/X1911^=1; no typical payment:

X1723=-1 or -1/X1823=-1 or -2/X1923=-1 or -2)

X1721(#1) Will the regular payments repay the loan completely or will

X1821(#2) there be a balance payable, or "balloon" payment when the

X1921(#3) loan is due?

1. \*REPAY COMPLETELY

5. \*BALANCE PAYABLE/BALLOON

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3; no loan on property:

X1711^=1/X1811^=1/X1911^=1; no typical payment:

X1723=-1 or -1/X1823=-1 or -2/X1923=-1 or -2)

X1722(#1) What will the balance due or balloon payment be?

X1822(#2)

X1922(#3) Code amount

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3; no loan on property:

X1711^=1/X1811^=1/X1911^=1; no typical payment:

X1723=-1 or -1/X1823=-1 or -2/X1923=-1 or -2; no

balloon payment: X1721^=2/X1821^=2/X1921^=2)

X7554(#1) Is this loan being paid off ahead of schedule, behind

X7553(#2) schedule, or are the payments about on schedule?

X7552(#3)

1. \*ON SCHEDULE

2. \*AHEAD OF SCHEDULE

3. \*BEHIND SCHEDULE

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3; no loan on property:

X1711^=1/X1811^=1/X1911^=1; no set number of payments:

X1716=-1/X1816=-1/X1916=-1; no typical payment:

X1723=-1 or -1/X1823=-1 or -2/X1923=-1 or -2)

X1725(#1) When do you expect this loan to be repaid?

X1825(#2)

X1925(#3) Code year (4 digits)

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3; no loan on property:

X1711^=1/X1811^=1/X1911^=1;loan on schedule: X7554=1/

X7553=1/X7552=1)

X1726(#1) What is the current annual interest rate being charged on

X1826(#2) the loan?

X1926(#3)

Code percent \* 100

-1. No interest

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3; no loan on property:

X1711^=1/X1811^=1/X1911^=1)

X1727(#1) Does this loan have an adjustable rate? That is, does it

X1827(#2) have an interest rate that can rise and fall from time to time?

X1927(#3)

1. \*YES

5. \*NO

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3; no loan on property:

X1711^=1/X1811^=1/X1911^=1)

X1728(#1) Please look at the list of institutions you wrote down.

X1828(#2) Is the loan with any of the institutions on the list, or from

X1928(#3) someplace else?

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

ASK R TO UPDATE LIST IF A NEW INSTITUTION IS MENTIONED

AT THIS POINT./IF "SOMEPLACE ELSE":What type of institution

is that?)

Please look at the Institutions Card. Is the loan with any

of the institutions on the Institutions Card, or from

someplace else?

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

CHECK INSTITUTION CARD AND UPDATE IF A NEW INSTITUTION IS

MENTIONED AT THIS POINT./ IF "SOMEPLACE ELSE": What type of

institution is that?)

WE WANT THE INSTITUTION THAT CURRENTLY HOLDS THE MORTGAGE,

NOT THE INSTITUTION WHERE R ORIGINALLY TOOK OUT THE LOAN.

1. \*Institution 1

2. \*Institution 2

3. \*Institution 3

4. \*Institution 4

5. \*Institution 5

6. \*Institution 6

7. \*Institution 7

-7. \*OTHER (Coded using the MASTER INSTITUTION LIST)

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3; no loan on property:

X1711^=1/X1811^=1/X1911^=1)

The following codes show on the screen after at

least seven distinct institutions have been during

the course of the interview:

11. \*COMMERCIAL BANK; trust company

12. \*S&L/SAVINGS BANK

14. \*FINANCE/LOAN CO

17. \*INSURANCE CO

18. \*MORTGAGE CO

19. \*CONTRACTOR/DEVELOPER

20. \*PRIOR OWNER

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SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

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X9099(#1) Recode: type of institution

X9100(#2)

X9101(#3) See MASTER INSTITUTION LIST for other codes (See X308)

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3; no loan on property:

X1711^=1/X1811^=1/X1911^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

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X1729(#1) Did you receive any income from this property in 2003?

X1829(#2)

X1929(#3) Did your family living here receive any income from this

property in 2003?

1. \*YES

5. \*NO

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3)

X1730(#1) How much gross income did you receive?

X1830(#2)

X1930(#3) How much gross income did your family receive?

INCOME BEFORE ANY DEDUCTIONS FOR LOANS, TAXES, OR OTHER

EXPENSES.

Code amount

-1. Nothing

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1/fewer than 2 properties: X1701<2/

fewer than 3 properties: X1701<3; no income from property:

X1719^-1/X1819^=1/X1929^=1)

X2001(#4) About the remaining properties that you own, are any of these

vacation homes or land you use for recreational purposes?

About the remaining properties that you and your family

living here own, are any of these vacation homes or land

you use for recreational purposes?

1. \*YES

5. \*NO

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; fewer than 4 properties:

X1701<4)

X8405(#4) Original value for Rs who did not provide complete

information within the grid structure (see introduction)

1. \*YES

5. \*NO

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; did not break off early in

grid)

X2002(#4) How much in total is your share of these vacation homes or

recreational property worth?

How much in total is your family's share of these vacation

homes or recreational property worth?

Code amount

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; fewer than 4 properties:

X1701<4; 4 or more properties, but no vacation

properties beyond 3rd property: X1701>=4 and

X2001^=1)

X8406(#4) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; did not break off early in

grid; no vacation properties among residual: X8405^=1)

X2003(#4) What was your total purchase price for these properties?

What was your family's total purchase price for these

properties?

(INTERVIEWER: IF GIFT/INHERITANCE, ASK VALUE WHEN RECEIVED.)

Code amount

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; fewer than 4 properties

X1701<4; 4 or more properties, but no vacation:

properties beyond 3rd property: X1701>=4 and

X2001^=1)

X8407(#4) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; did not break off early in

grid; no vacation properties among residual: X8405^=1)

X2004(#4) CODE GIFT/INHERITANCE

1. \*GIFT/INHERITANCE

5. \*R PURCHASED

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; fewer than 4 properties:

X1701<4; 4 or more properties, but no vacation

properties beyond 3rd property: X1701>=4 and

X2001^=1)

X8408(#4) Original value for Rs who did not provide complete

information within the grid structure (see introduction)

Code gift/inheritance

1. GIFT/INHERITANCE

5. R PURCHASED

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; did not break off early in

grid; no vacation properties among residual: X8405^=1)

X2005(#4) Are there any mortgages or loans outstanding against these

vacation homes or recreational land?

1. \*YES

5. \*NO

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; fewer than 4 properties:

X1701<4; 4 or more properties, but no vacation

properties beyond 3rd property: X1701>=4 and

X2001^=1)

X8409(#4) Original value for Rs who did not provide complete

information within the grid structure (see introduction)

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; did not break off early in

grid; no vacation properties among residual: X8405^=1)

X2006(#4) Altogether, about how much is owed on your share of these

mortgages or loans?

Altogether, about how much is owed on your family's share

of these mortgages or loans?

Code amount

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; fewer than 4 properties:

X1701<4; 4 or more properties, but no vacation

properties beyond 3rd property: X1701>=4 and

X2001^=1; no loans on property: X2005^=1)

X8410(#4) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; did not break off early in

grid; no vacation properties among residual: X8405^=1;

no mortgages on residual vacation properties: X8409^=1)

X2007(#4) How much are the payments on these loans or mortgages?

How much are the payments on your family's share of these

loans or mortgages?

Code amount

-1. Nothing

-2. No regular payments

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; fewer than 4 properties:

X1701<4; 4 or more properties, but no vacation

properties beyond 3rd property: X1701>=4 and

X2001^=1; no loans on property: X2005^=1)

X2008(#4) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often is that amount paid?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year

12. Every two months

22. Varies

23. 13 times a year; every 4 weeks

24. Every 6 weeks

31. \*Twice a month

-1. NO PAYMENT

-2. NO REGULAR PAYMENTS

-7. \*Other

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; fewer than 4 properties:

X1701<4; 4 or more properties, but no vacation

properties beyond 3rd property: X1701>=4 and

X2001^=1; no loans on property: X2005^=1)

X8411(#4) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; did not break off early in

grid; no vacation properties among residual: X8405^=1;

no mortgages on residual vacation properties: X8409^=1)

X8412(#4) Original value of frequency.

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year

12. Every two months

22. Varies

23. 13 times a year; every 4 weeks

24. Every 6 weeks

31. \*Twice a month

-1. NO PAYMENT

-2. NO REGULAR PAYMENTS

-7. \*Other

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; did not break off early in

grid; no vacation properties among residual: X8405^=1;

no mortgages on residual vacation properties: X8409^=1)

X2009(#4) Did you receive any income in 2003 from renting out these

vacation homes or recreational land?

Did you or your family living here receive any income in 2003

from renting out these vacation homes or recreational land?

1. \*YES

5. \*NO

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; fewer than 4 properties:

X1701<4; 4 or more properties, but no vacation

properties beyond 3rd property: X1701>=4 and

X2001^=1)

X8413(#4) Original value for Rs who did not provide complete

information within the grid structure (see introduction)

1. \*YES

5. \*NO

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; did not break off early in

grid; no vacation properties among residual: X8405^=1)

X2010(#4) Altogether, how much gross income did you receive?

Altogether, how much gross income did your family receive?

INCOME BEFORE ANY DEDUCTIONS FOR LOANS, TAXES, OR OTHER

EXPENSES.

Code amount

-1. Nothing

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; fewer than 4 properties:

X1701<4; 4 or more properties, but no vacation

properties beyond 3rd property: X1701>=4 and

X2001^=1; no income from property: X2009^=1)

X8414(#4) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; did not break off early in

grid; no vacation properties among residual: X8405^=1;

no rental income on residual vacation properties X8413^=1)

X2011(#5) Now I will ask a few details about all the remaining

properties of the (value of X6688) properties you told me

you have.

Do you have any other properties?

Do you and your family have any other properties?

Now I will ask a few details about all the remaining properties

you told me you have.

1. \*YES

5. \*NO

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; fewer than 4 properties:

X1701<4; 4 properties and one vacation properties

beyond 3rd property: X1701=4 and X2001=1)

X8415(#5) Original value for Rs who did not provide complete

information within the grid structure (see introduction)

1. \*YES

5. \*NO

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; did not break off early in

grid)

X2012(#5) For the remaining properties that you own, about how much

in total is your share worth? I mean, what could you sell

them for?

For the remaining properties that you own, about how much

in total is your family's share worth? I mean, what could

you sell them for?

Code amount

-1. Nothing

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; fewer than 4 properties:

X1701<4; 4 properties and one vacation properties

beyond 3rd property: X1701=4 and X2001=1)

X8416(#5) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; did not break off early in

grid; no remaining properties among residual: X8415^=1)

X2013(#5) About how much was your total purchase price for these

properties?

About how much was your family's total purchase price for

these properties?

(INTERVIEWER: IF GIFT/INHERITANCE, ASK VALUE WHEN RECEIVED.)

Code amount

-1. Nothing

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; fewer than 4 properties:

X1701<4; 4 properties and one vacation properties

beyond 3rd property: X1701=4 and X2001=1)

X8417(#5) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; did not break off early in

grid; no remaining properties among residual: X8415^=1)

X2014(#5) CODE GIFT/INHERITANCE

1. GIFT/INHERITANCE

5. R PURCHASED

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; fewer than 4 properties:

X1701<4; 4 properties and one vacation properties

beyond 3rd property: X1701=4 and X2001=1)

X8418(#5) Original value for Rs who did not provide complete

information within the grid structure (see introduction)

Code gift/inheritance

1. GIFT/INHERITANCE

5. R PURCHASED

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; did not break off early in

grid; no remaining properties among residual: X8415^=1)

X2015(#5) Are there mortgages or loans outstanding against these

properties?

1. \*YES

5. \*NO

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; fewer than 4 properties:

X1701<4; 4 properties and one vacation properties

beyond 3rd property: X1701=4 and X2001=1)

X8419(#5) Original value for Rs who did not provide complete

information within the grid structure (see introduction)

1. \*YES

5. \*NO

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; did not break off early in

grid; no remaining properties among residual: X8415^=1)

X2016(#5) Altogether, about how much is owed on your share of these

mortgages or loans?

Altogether, about how much is owed on your family's share of

these mortgages or loans?

Code amount

-1. Nothing

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; fewer than 4 properties:

X1701<4; 4 properties and one vacation properties

beyond 3rd property: X1701=4 and X2001=1;

no loans on property: X2015^=1)

X8420(#5) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; did not break off early in

grid; no remaining properties among residual: X8415^=1;

no mortgages on remaining properites: X8419^=1)

X2017(#5) How much are the payments on these loans or mortgages?

How much are the payments on your family's share of these

loans or mortgages?

Code amount

-1. Nothing

-2. No typical payment

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; fewer than 4 properties:

X1701<4; 4 properties and one vacation properties

beyond 3rd property: X1701=4 and X2001=1;

no loans on property: X2015^=1)

X2018(#5) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often is that amount paid?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year

12. Every two months

22. Varies

23. 13 times a year; every 4 weeks

24. Every 6 weeks

31. \*Twice a month

-1. NO PAYMENT

-2. NO REGULAR PAYMENTS

-7. \*Other

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; fewer than 4 properties:

X1701<4; 4 properties and one vacation properties

beyond 3rd property: X1701=4 and X2001=1;

no loans on property: X2015^=1)

X8421(#5) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; did not break off early in

grid; no remaining properties among residual: X8415^=1;

no mortgages on remaining properites: X8419^=1)

X8422(#5) Original value of frequency.

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year

12. Every two months

22. Varies

23. 13 times a year; every 4 weeks

24. Every 6 weeks

31. \*Twice a month

-1. NO PAYMENT

-2. NO REGULAR PAYMENTS

-7. \*Other

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; did not break off early in

grid; no remaining properties among residual: X8415^=1;

no mortgages on remaining properites: X8419^=1)

X2019(#5) Did you receive any income in 2003 from renting out any of

these properties?

Did you or your family living here receive any income in 2003

from renting out any of these properties?

1. \*YES

5. \*NO

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; fewer than 4 properties:

X1701<4; 4 properties and one vacation properties

beyond 3rd property: X1701=4 and X2001=1)

X8423(#5) Original value for Rs who did not provide complete

information within the grid structure (see introduction)

1. \*YES

5. \*NO

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; did not break off early in

grid; no remaining properties among residual: X8415^=1)

X2020(#5) Altogether, how much gross income from these properties

did you receive in 2003?

Altogether, how much gross income from these properties

did your family receive in 2003?

INCOME BEFORE ANY DEDUCTIONS FOR LOANS, TAXES, OR OTHER

EXPENSES.

Code amount

-1. Nothing

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; fewer than 4 properties:

X1701<4; 4 properties and one vacation properties

beyond 3rd property: X1701=4 and X2001=1;

no income from property: X2019^=1)

X8424(#5) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (No properties: X1700=5; no properties not owned

by a business: X1701=-1; did not break off early in

grid; no remaining properties among residual: X8415^=1;

no income from remaining properties: X8423^=1)

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

BUSINESSES

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X3101 DOES R OPERATE A FARM/RANCH BUSINESS ON THEIR PROPERTY?

(Coded automatically by CAPI program: X503=1 implies YES,

otherwise NO)

1. \*YES

5. \*NO

X3103 Now I would like to ask you about businesses you may own. Do

you own or share ownership in any privately-held businesses,

farms, professional practices, limited partnerships or any

other types of partnerships? Do not include corporations with

publicly-traded stock or any partnerships that have already

been recorded earlier.

Now I would like to ask you about businesses you may own. Do

you and your family living here own or share ownership in any

privately-held businesses, farms, professional practices,

limited partnerships or any other types of partnerships? Do

not include corporations with publicly-traded stock or any

partnerships that have already been recorded earlier.

IF R OWNS STOCKS THROUGH AN INVESTMENT CLUB, REPORT LATER AS

STOCKS OR MUTUAL FUNDS.

1. \*YES

5. \*NO

(value set to YES when R reported having a farm business:

X3101=YES)

-----------------------------------------------------------------------------

ACTIVELY MANAGED BUSINESSES

-----------------------------------------------------------------------------

X3104 Do you have an active management role in any of these

businesses?

Do you or anyone in your family living here have an active

management role in any of these businesses?

INTERVIEWER: INCLUDE THE GENERAL PARTNERS IN A LIMITED

PARTNERSHIP, BUT NOT THE LIMITED PARTNERS.

1. \*YES

5. \*NO

0. Inap. (no businesses: X3103^=1)

(value set to YES when R reported having a farm business:

X3101=YES)

X3105 Including your (farm/ranch) business here, in how many

(farms/ranches), privately-held businesses, professional

practices, limited partnerships, or any other types of

partnership do you own or share ownership in and have an

active management role? Do not include corporations with

publicly-traded stock or any property partnerships that

have already been recorded earlier.

Including your (farm/ranch) business here, in how many

(farms/ranches), privately-held businesses, professional

practices, limited partnerships, or any other types of

partnership do you or your family living here own or share

ownership in and have an active management role? Do not

include corporations with publicly-traded stock or any

property partnerships that have already been recorded

earlier.

INTERVIEWER: INCLUDE THE GENERAL PARTNERS IN A LIMITED

PARTNERSHIP, BUT NOT THE LIMITED PARTNERS. IF R OWNS A

HOLDING COMPANY, REPORT THE COMPONENTS SEPARATELY. IF R

OWNS STOCKS THROUGH AN INVESTMENT CLUB, REPORT LATER AS

STOCKS OR MUTUAL FUNDS. RECORD DETAILS FOR EACH BUSINESS

SEPARATELY. EXCEPTION: TREAT BUSINESSES MANAGED TOGETHER

AS ONE BUSINESS, IF THAT IS EASIER FOR R.

In how many businesses do you have an active management role?

In how many businesses do you or anyone in your family

living here have an active management role?

Code number

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1)

I will ask you first about your (farm/ranch) business.

When we talk about the value of (farm/ranch) assets and

liabilities here, we are referring to (farm/ranch)

implements, livestock, crops, etc., and operating loans

other than your mortgages.

INTERVIEWER: DO NOT INCLUDE THE VALUE OF THE PROPERTIES

AND LOANS ALREADY RECORDED.

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 25

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6689 Originally reported value of X3105 (see introduction)

Code number

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 25

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-----------------------------------------------------------------------------

#1 refers to first actively managed business

#2 refers to second actively managed business

#3 refers to third actively managed business

#4 refers to all remaining actively managed businesses

-----------------------------------------------------------------------------

X3107(#1) What kind of business is it/the largest business/the next

X3207(#2) business/that is, what does the business make of do?

X3307(#3)

Code Census 2004 4-digit industry code

See X7402/7412 for codes.

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

In the public version of the data set, these codes have been

collapsed in the following way:

IF (170 <= 4-digit ind. code <=290) THEN ind. code=1;

ELSE IF (7480 <= 4-digit ind. code <=7480) THEN ind. code=1;

ELSE IF (7770 <= 4-digit ind. code <=7770) THEN ind. code=1;

ELSE IF (370 <= 4-digit ind. code <=490) THEN ind. code=2;

ELSE IF (770 <= 4-digit ind. code <=770) THEN ind. code=2;

ELSE IF (1070 <= 4-digit ind. code <=3990) THEN ind. code=3;

ELSE IF (6470 <= 4-digit ind. code <=6480) THEN ind. code=3;

ELSE IF (8560 <= 4-digit ind. code <=8560) THEN ind. code=3;

ELSE IF (4070 <= 4-digit ind. code <=5790) THEN ind. code=4;

ELSE IF (8680 <= 4-digit ind. code <=8690) THEN ind. code=4;

ELSE IF (6490 <= 4-digit ind. code <=6490) THEN ind. code=5;

ELSE IF (6695 <= 4-digit ind. code <=6695) THEN ind. code=5;

ELSE IF (6870 <= 4-digit ind. code <=7080) THEN ind. code=5;

ELSE IF (7190 <= 4-digit ind. code <=7190) THEN ind. code=5;

ELSE IF (7580 <= 4-digit ind. code <=7590) THEN ind. code=5;

ELSE IF (7680 <= 4-digit ind. code <=7680) THEN ind. code=5;

ELSE IF (8770 <= 4-digit ind. code <=8890) THEN ind. code=5;

ELSE IF (570 <= 4-digit ind. code <=690) THEN ind. code=6;

ELSE IF (6070 <= 4-digit ind. code <=6390) THEN ind. code=6;

ELSE IF (6570 <= 4-digit ind. code <=6692) THEN ind. code=6;

ELSE IF (6770 <= 4-digit ind. code <=6780) THEN ind. code=6;

ELSE IF (7170 <= 4-digit ind. code <=7180) THEN ind. code=6;

ELSE IF (7270 <= 4-digit ind. code <=7470) THEN ind. code=6;

ELSE IF (7490 <= 4-digit ind. code <=7570) THEN ind. code=6;

ELSE IF (7670 <= 4-digit ind. code <=7670) THEN ind. code=6;

ELSE IF (7690 <= 4-digit ind. code <=7690) THEN ind. code=6;

ELSE IF (7780 <= 4-digit ind. code <=8470) THEN ind. code=6;

ELSE IF (8570 <= 4-digit ind. code <=8670) THEN ind. code=6;

ELSE IF (8970 <= 4-digit ind. code <=9290) THEN ind. code=6;

ELSE IF (9370 <= 4-digit ind. code <=9890) THEN ind. code=7;

For business values (X3129/X3229/X3329) greater than or

equal to $100 million \* 1.0651 (CPI current methods

adjustment to get 2004 dollars from 2001), this variable

is set to a value of 99.

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X3108(#1) How did you first acquire this business; was it bought or

X3208(#2) invested in, started by you, inherited, given to you, or what?

X3308(#3)

How did you or your family living here first acquire this

business; was it bought or invested in, started by you,

inherited, given to you, or what?

1. \*BOUGHT/INVEST

2. \*STARTED

3. \*INHERITED

4. \*GIVEN

5. \*JOINED/BECAME PARTNER/PROMOTION

-7. \*OTHER

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODE 4 HAS BEEN COMBINED

WITH CODE 3

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X3110(#1) In what year did you start the business?

X3210(#2)

X3310(#3) In what year did you acquire the business?

Code year (4 digits)

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-50

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X3111(#1) How many employees does it have including you?

X3211(#2)

X3311(#3) How many employees does it have including you and members

of your family?

Code number

-1. None

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, ROUNDED TO NEAREST 5 IF

> 10 WITH A TOP-CODE AT 5000

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X3112(#1) INTERVIEWER CHECKPOINT

X3212(#2) 1. R LIVES ALONE

X3312(#3) 2. ALL OTHERS

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

Which members of your family living here work in or

participate in the operation of the business?

INTERVIEWER: CODE ALL THAT APPLY

X3113(#1) \*RESPONDENT

X3213(#2)

X3313(#3) 1. Checked

5. Not checked

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3)

X3114(#1) \*SPOUSE/PARTNER

X3214(#2)

X3314(#3) 1. Checked

5. Not checked

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3; R lives alone: X7001=1)

X3115(#1) \*ADULT CHILD; child; child-in-law; grandchild

X3215(#2)

X3315(#3) 1. Checked

5. Not checked

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3; R lives alone: X7001=1)

GF

X3116(#1) \*OTHER ADULT IN PEU

X3216(#2)

X3316(#3) 1. Checked

5. Not checked

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3; R lives alone: X7001=1)

X3117(#1) \*OTHER

X3217(#2)

X3317(#3) 1. Checked

5. Not checked

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3; R lives alone: X7001=1)

X3118(#1) Other than you and your (spouse/partner), how many hours

X3218(#2) does the other family member work in this business in a

X3318(#3) normal week?

Other than you and your (spouse/partner), how many hours

does the most involved family member work in this business

in a normal week?

Other than you, how many hours does the other family member

work in this business in a normal week?

Other than you, how many hours does the most involved

family member work in this business in a normal week?

How many hours does the other family member work in this

business in a normal week?

How many hours does the most involved family member work in

this business in a normal week?

Code number of hours

-1. None

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3; R lives alone: X7001=1; no one

in PEU besides R/Spouse works in business: X3115^=1 and

X3116^=1 and X3117^=1/X3215^=1 and X3216^=1 and

X3217^=1/X3315^=1 and X3316^=1 and X3317^=1/)

X3119(#1) Is it a partnership, a sole-proprietorship, a subchapter S

X3219(#2) corporation, another type of corporation, or what?

X3319(#3)

1. \*PARTNERSHIP

2. \*SOLE-PROPRIETORSHIP

3. \*SUBCHAPTER S

4. \*OTHER CORPORATION (including C chapter corps and

professional corporations)

6. Foreign business type

11. Limited partnership, LLP (limited liability partnership)

12. \*LLC (LIMITED LIABILITY COMPANY) (include professional

limited liability companies)

40. Not a formal business type

-7. \*OTHER

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATASET, CODE 12 HAS BEEN COMBINED

WITH CODE 11.

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X3120(#1) These next few questions are about the relationship between

X3220(#2) your personal finances and the finances of your business.

X3320(#3)

These next few questions are about the relationship between

your family's personal finances and the finances of your

family's business.

Are you using personal assets as collateral or did you have to

cosign or guarantee any loans for this business?

Are you or your family living here using personal assets as

collateral or did you have to cosign or guarantee any loans

for this business?

1. \*YES

5. \*NO

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3)

X7144(#1) Which of these did you do? Collateralize a loan, guarantee

X7145(#2) a loan, or both?

X7146(#3)

1. \*COLLATERALIZE

2. \*GUARANTEE

3. \*BOTH

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3; did not guarantee or

collateralize: X3120^=1/X3220^=1/X3320^=1)

X3121(#1) How much is collateralized?

X3221(#2)

X3321(#3) How much is guaranteed?

How much is guaranteed or collateralized?

Code amount

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3; did not guarantee or

collateralize: X3120^=1/X3220^=1/X3320^=1)

X3122(#1) Did I record this earlier?

X3222(#2)

X3322(#3) 1. \*YES

4. R reported YES, but no apparent match in data

5. \*NO

6. R reported YES (or edited to YES), but appears to be

included only partially in data recorded elsewhere

7. Matching amount elsewhere is larger than amount

currently reported as guaranteed

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3; did not guarantee or

collateralize: X3120^=1/X3220^=1/X3320^=1)

NOTE: where (X3122 X3222 X3322)=1, the amount of the loan

is not edited out of the earlier location. Where linked

loans are reported at X6842, this information is edited

into this question.

X7551(#1) Which loan was that?

X7550(#2)

X7549(#3) 1. \*Credit card or store debt

2. \*Mortgage debt

3. \*Home equity loan

4. \*Other home purchase loan

5. \*Home improvement loan

6. \*Loan for other real estate

7. \*Line of credit

8. \*Business loan

9. \*Vehicle loan

10. \*Education Loan

11. \*Other installment loan

12. \*Margin loan

13. \*Insurance loan

14. \*Pension loan

25. Other installment loan #1

26. Other installment loan #2

27. Other installment loan #3

28. Other installment loan #4

29. Other installment loan #5

30. Other installment loan #6

-7. \*Other

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3; did not guarantee or

collateralize: X3120^=1/X3220^=1/X3320^=1; loan not

reported earlier: X3122^=1/X3221^=1/X3321^=1)

NOTE: The loan types above marked with an asterisk only

appeared on an interviewer's screen when the respondent had

previously reported having those types of loans.

NOTE: Where a linked business loan is reported at X6842

etc., the link is edited into this question.

X3123(#1) Other than guarantees, does the business owe you any money?

X3223(#2)

X3323(#3) Does the business owe you any money?

Other than guarantees, does the business owe you or your

family living here any money?

Does the business owe you or your family living here any

money?

1. \*YES

5. \*NO

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3)

X3124(#1) How much is owed?

X3224(#2)

X3324(#3) Code amount

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3; business does not owe R any money:

X3123^=1/X3223^=1/X3323^=1)

X3125(#1) Do you owe the business any money?

X3225(#2)

X3325(#3) Do you or your family living here owe the business any money?

1. \*YES

5. \*NO

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3)

X3126(#1) How much do you owe?

X3226(#2)

X3326(#3) Code amount

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3; R does not owe business any money:

X3125^=1/X3225^=1/X3325^=1)

X3127(#1) Did I record this earlier?

X3227(#2)

X3327(#3) 1. \*YES

4. R reported YES, but no apparent match in data

5. \*NO

6. R reported YES, partially recorded earlier

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3; R does not owe business any money:

X3125^=1/X3225^=1/X3325^=1)

NOTE: this variable was extensively edited to verify

amounts reported earlier

X7548(#1) When was it mentioned?

X7547(#2)

X7546(#3) 1. \*Credit card or store card

2. \*Mortgage debt

3. \*Home equity loan

4. \*Other home purchase loan

5. \*Home improvement loan

6. \*Loan for other real estate

7. \*Line of credit

8. \*Business loan

9. \*Vehicle loan

10. \*Education Loan

11. \*Other installment loan

12. \*Margin loan

13. \*Insurance loan

14. \*Pension loan

25. Other installment loan #1

26. Other installment loan #2

27. Other installment loan #3

28. Other installment loan #4

29. Other installment loan #5

30. Other installment loan #6

-7. \*Other

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3; R does not owe business any money:

X3125^=1/X3225^=1/X3325^=1; amount owed to business

not reported earlier: X3127^=1/X3227^=1/X3327^=1)

NOTE: The loan types above marked with an asterisk only

appeared on an interviewer's screen when the respondent had

previously reported having those types of loans.

X3128(#1) What percentage of the business do you own?

X3228(#2)

X3328(#3) What percentage of the business do you and your family

living here own?

Code percent \* 100

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3)

X3129(#1) What is the net worth of this business? [ASKED IF R

X3229(#2) OWNS 100% OR ORGANIZATION FORM IS SOLE-PROPRIETORSHIP]

X3329(#3) What is the net worth of your share of this business?

PROBE: What could you sell it for? [ASKED IN ALL OTHER INSTANCES]

THE VALUE SHOULD BE NET OF ALL LOANS.

Code amount

-1. Nothing

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, AMOUNTS >=100000000 \* 1.0651

(CPI current methods adjustment to get 2004 dollars

from 2001) X3107/X3207/X3307 SET TO 99

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X3130(#1) If you sold the business now, what would be the cost basis

X3230(#2) for tax purposes of this share? PROBE IF R UNSURE: What was

X3330(#3) your original investment?

If you sold the business now, what would be the cost basis

for tax purposes of this share? PROBE IF R UNSURE: What was

the value when you received it?

Code amount

-1. Nothing

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3)

X3131(#1) What were the gross receipts or gross sales of the business

X3231(#2) as a whole in 2003?

X3331(#3)

PARTNERSHIP: IRS FORM 1065, LINE 1C

SOLE-PROPRIETORSHIP: IRS FORM 1040, SCH. C, LINE 1

S-CORPORATION: IRS FORM 1120S, LINE 1C

OTHER CORPORATION: IRS FORM 1120 OR 1120A, LINE 1C

IF BUSINESS NEW SINCE LAST YEAR CODE ZERO.

Code amount

-1. Nothing

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3)

X3132(#1) What was the business's total net income before taxes in 2003?

X3232(#2)

X3332(#3)

PARTNERSHIP: ORDINARY INCOME/LOSS: IRS FORM 1065, LINE 22

SOLE-PROPRIETORSHIP: NET PROFIT/LOSS: IRS FORM 1040, SCH. C, LINE 31

S-CORPORATION: NET INCOME: IRS FORM 1120S, LINE 21

OTHER CORPORATION: TAXABLE INCOME BEFORE NET OPERATING LOSS

DEDUCTION: IRS FORM 1120 LINE 30; OR 1120A, LINE 26

Code amount

-1. Nothing

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1/fewer than 2 actively managed

businesses: X3105<2/fewer than 3 actively managed

businesses X3105<3)

X3335(#4) For the remaining business you own and actively manage,

what could you sell your share for? PROBE: What is your share

worth?

For the remaining businesses you own and actively manage,

what could you sell your share for? PROBE: What is your share

worth

For the remaining business you and your family living here

own and actively manage, what could you sell your share

for? PROBE: What is your share worth?

For the remaining businesses you and your family living

here own and actively manage, what could you sell your

share for? PROBE: What is your share worth?

Code amount

-1. Nothing

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1; fewer than 2 actively managed

businesses: fewer than 4 actively managed businesses:

X3105<4)

X8425(#4) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1; did not break off early in grid)

X3336(#4) If you sold this business now, what would be the cost basis

for tax purposes of your share? PROBE IF R UNSURE: What was

your original investment?

If you sold these businesses now, what would be the cost

basis for tax purposes of your share? PROBE IF R UNSURE:

What was your original investment?

Code amount

-1. Nothing

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1; fewer than 2 actively managed

businesses: fewer than 4 actively managed businesses:

X3105<4)

X8426(#4) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1; did not break off early in grid)

X3337(#4) What was the total net income you received from this

business in 2003?

What was the total net income you received from these

businesses in 2003?

What was the total net income you and your family living here

(received from this business in 2003?/received from these

businesses in 2003?)

Code amount

-1. Nothing

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1; fewer than 2 actively managed

businesses: fewer than 4 actively managed businesses:

X3105<4)

X8427(#4) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (no businesses: X3103^=1; no actively managed

businesses: X3104^=1; did not break off early in grid)

-----------------------------------------------------------------------------

NON-ACTIVELY MANAGED BUSINESSES

-----------------------------------------------------------------------------

X3401 Do you own or have an interest in any other businesses or any

type of partnership where you do not have an active management

role? IF YES: Please do not include any assets reported earlier.

Do you or anyone in your family living here own or have an

interest in any other businesses or any type of partnership

where you do not have an active management role?

IF YES: Please do not include any assets reported earlier.

1. \*YES

5. \*NO

0. Inap. (no businesses: X3103^=1)

X3402 In how many businesses do you own or share ownership where

you do not have an active management role?

In how many businesses do you and your family living here

own or share ownership where you do not have an active

management role?

Code number

0. Inap. (no businesses: X3103^=1; no non-actively managed

businesses: X3401^=1)

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FOR THE PUBLIC DATA SET, TOP-CODED AT 25

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-----------------------------------------------------------------------------

#1 refers to limited partnerships

#2 refers to other partnerships

#3 refers to subchapter S corporations

#4 refers to other types of corporations

#5 refers to sole-proprietorships

#6 refers to all other non-actively managed businesses

-----------------------------------------------------------------------------

Is it a sole-proprietorship, a limited partnership, another

type of partnership, a Subchapter S corporation, another

type of corporation, or what?

(I need to know what type of businesses these are.)

X3407(#1) Are any of them limited partnership?

X3411(#2) Are any of them other partnership?

X3415(#3) Are any of them subchapter S corporation?

X3419(#4) Are any of them other corporation?

X3423(#5) Are any of them sole-proprietorship?

X3427(#6) Are any of them some other kind of business?

1. \*YES

5. \*NO

0. Inap. (no businesses: X3103^=1; no non-actively managed

businesses: X3401^=1)

What could you sell your share for?

PROBE: What is it worth?

What could you sell your family's share for?

PROBE: What is it worth?

X3408(#1) What could you sell your share of all these Limited

Partnerships for?

PROBE: What is it worth?

What could you sell your family's share of all these

Limited Partnerships for?

PROBE: What is it worth?

X3412(#2) What could you sell your share of all these Other

partnerships for?

PROBE: What is it worth?

What could you sell your family's share of all these Other

partnerships for?

PROBE: What is it worth?

X3416(#3) What could you sell your share of all these Subchapter S

Corporations for?

PROBE: What is it worth?

What could you sell your family's share of all these

Subchapter S Corporations for?

PROBE: What is it worth?

X3420(#4) What could you sell your share of all these Other

Corporations for?

PROBE: What is it worth?

What could you sell your family's share of all these Other

Corporations for?

PROBE: What is it worth?

X3424(#5) What could you sell your share of all these Sole-

Proprietorships for?

PROBE: What is it worth?

What could you sell your family's share of all these Sole-

Proprietorships for?

PROBE: What is it worth?

X3428(#6) What could you sell your share of all these (other type) for?

PROBE: What is it worth?

What could you sell your family's share of all these (other

type) for?

PROBE: What is it worth?

Code amount

-1. Nothing

0. Inap. (no businesses: X3103^=1; no non-actively managed

businesses: X3401^=1; no non-actively managed

businesses of type: X3407^=1/X3411^=1/X3415^=1/X3419^=1/

X3423^=1/X3427^=1)

X8452 Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (no businesses: X3103^=1 no non-actively managed

businesses: X3401^=1; did not break off early in grid)

If you sold this business now, what would be the cost basis

for tax purposes?

PROBE IF R UNSURE: What was your original investment?

X3409(#1) If you sold these Limited Partnerships now, what would be

the cost basis for tax purposes?

PROBE IF R UNSURE: What was your original investment?

X3413(#2) If you sold these Other partnerships now, what would be the

cost basis for tax purposes?

PROBE IF R UNSURE: What was your original investment?

X3417(#3) If you sold these Subchapter S Corporations now, what would

be the cost basis for tax purposes?

PROBE IF R UNSURE: What was your original investment?

X3421(#4) If you sold these Other Corporations now, what would be the

cost basis for tax purposes?

PROBE IF R UNSURE: What was your original investment?

X3425(#5) If you sold these Sole-Proprietorships now, what would be the

cost basis for tax purposes?

PROBE IF R UNSURE: What was your original investment?

X3429(#6) If you sold these (other type) now, what would be the

cost basis for tax purposes?

PROBE IF R UNSURE: What was your original investment?

Code amount

-1. Nothing

0. Inap. (no businesses: X3103^=1; no non-actively managed

businesses: X3401^=1; no non-actively managed

businesses of type: X3407^=1/X3411^=1/X3415^=1/X3419^=1/

X3423^=1/X3427^=1)

X8453 Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (no businesses: X3103^=1 no non-actively managed

businesses: X3401^=1; did not break off early in grid)

What was the total net income you received from this

business in 2003?

What was the total net income you and your family living here

received from this business in 2003?

X3410(#1) What was the total net income you received from all such

Limited Partnerships in 2003?

What was the total net income you and your family living here

received from all such Limited Partnerships in 2003?

X3414(#2) What was the total net income you received from all such

Other partnerships in 2003?

What was the total net income you and your family living here

received from all such Other partnerships in 2003?

X3418(#3) What was the total net income you received from all such

Subchapter S Corporations in 2003?

What was the total net income you and your family living here

received from all such Subchapter S Corporations in 2003?

X3422(#4) What was the total net income you received from all such

Other Corporations in 2003?

What was the total net income you and your family living here

received from all such Other Corporations in 2003?

X3426(#5) What was the total net income you received from all such

Sole-Proprietorships in 2003?

What was the total net income you and your family living here

received from all such Sole-Proprietorships in 2003?

X3430(#6) What was the total net income you received from all such

(other type) in 2003?

What was the total net income you and your family living here

received from all such (other type) in 2003?

Code amount

-1. Nothing

0. Inap. (no businesses: X3103^=1; no non-actively managed

businesses: X3401^=1; no non-actively managed

businesses of type: X3407^=1/X3411^=1/X3415^=1/X3419^=1/

X3423^=1/X3427^=1)

X8454 Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (no businesses: X3103^=1 no non-actively managed

businesses: X3401^=1; did not break off early in grid)

X7545 Were you ever involved in the active management of the

businesses?

Were you ever involved in the active management of the

business?

Were you or any of your family living here ever involved in

the active management of the businesses?

Were you or any of your family living here ever involved in

the active management of the business?

1. \*Yes

5. \*No

0. Inap. (no businesses: X3103^=1; no non-actively managed

businesses: X3401^=1)

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

VEHICLES

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

VEHICLES SUPPLIED BY A BUSINESS

-----------------------------------------------------------------------------

X2501 Now I'd like to get some information on your vehicles.

Some people have cars or other vehicles provided to them by

a business for personal and business use. Do you have any

such business vehicles?

Now I'd like to get some information on your family's

vehicles. Some people have cars or other vehicles provided

to them by a business for personal and business use. Do

you or anyone in your family have any such business vehicles?

1. \*YES

5. \*NO

X2502 How many such vehicles do you regularly use?

How many such vehicles do you or someone in your family

living here regularly use?

Code number

0. Inap. (no vehicles supplied by a business: X2501^=1)

X7149 Does the business lease this vehicle?

Does the business lease any of these vehicles?

1. \*YES

5. \*NO

0. Inap. (no vehicles supplied by a business: X2501^=1)

-----------------------------------------------------------------------------

LEASED VEHICLES

-----------------------------------------------------------------------------

X2101 Other than any vehicles provided by a business...

Are you currently leasing any cars or other vehicles?

Are you or anyone in your family living here currently

leasing any cars or other vehicles?

1. \*YES

5. \*NO

X2102 Not counting vehicles leased by a business, how many cars

or other vehicles do you lease?

Not counting vehicles leased by a business, how many cars

or other vehicles do you and your family living here lease?

Code number

0. Inap. (no personally leased vehicles: X2101^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 3

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6690 Originally reported value of X2101 (see introduction)

Code number

0. Inap. (no personally leased vehicles: X2101^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 3

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

-----------------------------------------------------------------------------

#1 refers to first personally leased vehicle

#2 refers to second personally leased vehicle

#3 refers to all other personally leased vehicles

-----------------------------------------------------------------------------

What model year, make and model is this vehicle?

What model year, make and model is the newest vehicle?

What model year, make and model is the next vehicle?

(2-WORD ANSWER. MAKE AND MODEL)

PROBE FOR FULL MODEL NAME.

X7023(#1) Code make

X7025(#2)

66 Acura

64 Alfa Romeo

01 American Motors (AMC)

200 Aston Martin

65 Audi

201 Austin Healey

202 Bentley

69 BMW

08 Buick

12 Cadillac

20 Chevrolet

24 Chrysler

203 Citroen

72 Daewoo

70 Daihatsu

71 Datsun (same as Nissan)

204 DeTomaso

28 Dodge

42 Eagle

205 Ferrari

73 Fiat

33 Ford

232 Freightliner

87 Geo

37 GMC

206 Hallenbeck

77 Honda

207 Hummer

68 Hyundai

88 Infiniti

208 International (IH)

74 Isuzu

75 Jaguar

43 Jeep

67 Kia

89 Lexus

209 Lamborghini

80 Lancia

96 Land Rover

44 Lincoln

210 Lotus

211 Mack

212 Maserati

76 Mazda

79 Mercedes-Benz

48 Mercury

82 Merkur

78 MG

213 Mini Cooper

81 Mitsubishi

230 Morgan

228 Morris

229 Nash

71 Nissan

50 Oldsmobile

214 Packard

215 Peterbuilt

84 Peugeot

216 Pierce Arrow

56 Plymouth

61 Pontiac

85 Porsche

217 Qvale

86 Renault

231 Riley

218 Rolls Royce

91 Saab

219 Saleen

62 Saturn

220 Scion

221 Shelby

90 Sterling

222 Studebaker

94 Subaru

92 Suzuki

93 Toyota

223 Triumph (TR)

224 Viper

97 Volkswagen

98 Volvo

225 Willis

226 Yukon

227 Zimmer

-7. OTHER

0. Inap. (no personally leased vehicles: X2101^=1/fewer

than 2 leased vehicles: X2101<2)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X7024(#1) Code model

X7026(#2) 0. Inap. (no personally leased vehicles: X2101^=1/fewer

than 2 leased vehicles: X2101<2)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X2104(#1) Code model year (4 digits)

X2111(#2) 0. Inap. (no personally leased vehicles: X2101^=1/fewer

than 2 leased vehicles: X2101<2)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-20

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X8163(#1) Recode: prevailing retail VALUE OF VEHICLE as of fall 2004

X8164(#2) according to industry guidebook

Code value

0. Inap. (no personally leased vehicles: X2101^=1/fewer

than 2 leased vehicles: X2101<2)

X2105(#1) How much are your lease payments?

X2112(#2)

Code amount

-1. Nothing

-2. No regular payments

0. Inap. (no personally leased vehicles: X2101^=1/fewer

than 2 leased vehicles: X2101<2)

X2106(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X2113(#2) (And how often are they due?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. Lump sum; one payment only

11. \*Twice per year

12. Every two months

22. Varies

23. 13 times a year; every 4 weeks

24. Every 6 weeks

31. \*Twice a month

-1. NO PAYMENT

-2. NO REGULAR PAYMENTS

-7. \*Other

0. Inap. (no personally leased vehicles: X2101^=1/fewer

than 2 leased vehicles: X2101<2)

How many years or months was the original lease?

X2107(#1) Code number of years

X2114(#2) -1. Less than one year

0. Inap. (no personally leased vehicles: X2101^=1/fewer

than 2 leased vehicles: X2101<2; number of months

given: X2108/X2115>0)

X2108(#1) Code number of months

X2115(#2) 0. Inap. (no personally leased vehicles: X2101^=1/fewer

than 2 leased vehicles: X2101<2; number of years

given: X2107/X2114>0)

X2117(#3) Altogether, about how much are the lease payments on your

other leased vehicles?

Altogether, about how much are the lease payments on your

other leased vehicle?

Code amount

-1. Nothing

-2. No regular payments

0. Inap. (no personally leased vehicles: X2101^=1; fewer

than 3 leased vehicles: X2101<3)

X2118(#3) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often is that amount paid?)

Code frequency

1. \*Day

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. Lump sum; one payment only

11. Twice per year

12. Every two months

22. Varies

23. 13 times a year; every 4 weeks

24. Every 6 weeks

31. \*Twice a month

-1. NO PAYMENT

-2. NO REGULAR PAYMENTS

-7. \*Other

0. Inap. (no personally leased vehicles: X2101^=1; fewer

than 3 leased vehicles: X2101<3)

X8428(#3) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (no personally leased vehicles: X2101^=1;

did not break off early in grid)

X8429(#3) Original value of frequency.

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. Lump sum; one payment only

11. Twice per year

12. Every two months

22. Varies

23. 13 times a year; every 4 weeks

24. Every 6 weeks

31. \*Twice a month

-1. NO PAYMENT

-2. NO REGULAR PAYMENTS

-7. \*Other

0. Inap. (no personally leased vehicles: X2101^=1;

did not break off early in grid)

-----------------------------------------------------------------------------

OWNED CARS, TRUCKS, VANS, AND SPORT UTILITY VEHICLES

-----------------------------------------------------------------------------

X2201 Do you own any cars, or any kind of truck, van or sport utility

vehicle (SUV)?

Do you or anyone in your family here own any cars, or any

kind of truck, van or sport utility vehicle (SUV)?

Do not include motorcyles, tractors, snow blowers, etc.,

or any vehicles owned by a business.

INCLUDE VEHICLES THAT ARE (OR COULD EASILY BE) IN RUNNING CONDITION.

1. \*YES

5. \*NO

X2202 Altogether, how many such cars or vehicles do you own?

Altogether, how many such cars or vehicles do you and your

family living here own?

Code number

0. Inap. (no owned cars etc.: X2201^=1)

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FOR THE PUBLIC DATA SET, TOP-CODED AT 10

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X6691 Originally reported value of X2202 (see introduction)

Code number

0. Inap. (no owned cars etc.: X2201^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 10

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-----------------------------------------------------------------------------

#1 refers to first personally owned car

#2 refers to second personally owned car

#3 refers to third personally owned car

#4 refers to fourth personally owned car

#5 refers to all other personally owned cars

-----------------------------------------------------------------------------

GF

X2203(#1) What type of vehicle is it?

X2303(#2)

X2403(#3) What type of vehicle is the newest one?

X7150(#4)

What type of vehicle is the next one?

INTERVIEWER: PROBE IF NECESSARY.

Is it a car, a van or minivan, a jeep or sport-utility

vehicle, a pickup, or what?

1. \*Car

2. \*Van/minivan

3. \*Sport utility vehicle (SUV)

4. \*Pickup

5. Antique/classic/collector vehicle

6. Truck (except pickup)

8. \*Station wagon

-7. \*Other

0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4)

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FOR THE PUBLIC DATA SET, CODES 5 AND 6 ARE COMBINED

WITH -7

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What model year, make and model is it?

(2-WORD ANSWER. MAKE AND MODEL)

PROBE FOR FULL MODEL NAME.

X7027(#1) Code make

X7029(#2) See MASTER VEHICLE MANUFACTURER LIST at X....

X7031(#3) 0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X7033(#4) X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X7028(#1) Code model

X7030(#2) 0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X7032(#3) X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X7034(#4) X2202<4)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X2205(#1) Code model year (4 digits)

X2305(#2) 0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2405(#3) X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X7152(#4) X2202<4)

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FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-20

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X8166(#1) Recode: prevailing retail VALUE OF VEHICLE as of fall 2004

X8167(#2) according to industry guidebook (NADA)

X8168(#3)

X8188(#4) Code value

0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4)

X7543(#1) When you got it, was it new or used?

X7542(#2)

X7541(#3) 1. \*New

X7153(#4) 2. \*Used

0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4)

X7540(#1) In what year did you get it?

X7539(#2)

X7538(#3) Code year (4 digits)

X7154(#4) 0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4; did not buy car used: X7543^=2/X7542^=2/X7541^=2/

X7153^=2)

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FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-20

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X2206(#1) Not counting any loans I've already recorded, is any money

X2306(#2) still owed on loans for this (make and model)?

X2406(#3)

X7155(#4) 1. \*YES

5. \*NO

0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4)

In what month and year was the loan taken out?

X2207(#1) Code month

X2307(#2) 1. \*January

X2407(#3) 2. \*February

X7156(#4) 3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4; no loan on car: X2206^=1/X2306^=1/X2406^=1/

X7155^=1)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X2208(#1) Code year (4 digits)

X2308(#2)

X2408(#3) 0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X7157(#4) X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4; no loan on car: X2206^=1/X2306^=1/X2406^=1/

X7155^=1)

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FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-20

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X2209(#1) How much was borrowed or financed?

X2309(#2)

X2409(#3) Code amount

X7158(#4) 0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4; no loan on car: X2206^=1/X2306^=1/X2406^=1/

X7155^=1)

X2210(#1) Is this a regular installment loan where you pay a fixed

X2310(#2) dollar amount each month for a fixed number of months until

X2410(#4) the loan is repaid, or some other kind?

X7159(#4)

1. \*Regular Installment

2. \*Other Kind

0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4; no loan on car: X2206^=1/X2306^=1/X2406^=1/

X7155^=1)

How many monthly payments or years were agreed upon when

the loan was received?

X2212(#1) Code number of years

X2312(#2) -1. No set number of years

X2412(#3) -7. Unable to calculate from number of payments

X7161(#4) 0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4; no loan on car: X2206^=1/X2306^=1/X2406^=1/

X7155^=1; not a regular loan: X2210^=1/X2310^=1/

X2410^=1/X7159^=1)

X2211(#1) Code number of payments

X2311(#2) -1. No set number of payments

X2411(#3) -7. Unable to calculate from number of years

X7160(#4) 0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4; no loan on car: X2206^=1/X2306^=1/X2406^=1/

X7155^=1; not a regular loan: X2210^=1/X2310^=1/

X2410^=1/X7159^=1)

X9162(#1) Recode: term of loan in months

X9163(#2) -1. No set number of years/payments

X9164(#3) -7. Unable to calculate from number of years/payments

X9179(#4) 0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4; no loan on car: X2206^=1/X2306^=1/X2406^=1/

X7155^=1; not a regular loan: X2210^=1/X2310^=1/

X2410^=1/X7159^=1)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X2213(#1) How much are the payments?

X2313(#2)

X2413(#3) Code amount

X7162(#4) -1. Nothing

-2. No regular payment

0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4; no loan on car: X2206^=1/X2306^=1/X2406^=1/

X7155^=1; not a regular loan: X2210^=1/X2310^=1/

X2410^=1/X7159^=1; no set number of payments: X2212=-1/

X2312=-1/X2412=-1/X7161=-1)

X7537(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X7536(#2) (And how often are they made?)

X7535(#3)

X7163(#4) Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. Lump sum; one payment only

11. \*Twice per year

12. Every two months

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4; no loan on car: X2206^=1/X2306^=1/X2406^=1/

X7155^=1; not a regular loan: X2210^=1/X2310^=1/

X2410^=1/X7159^=1; no set number of payments: X2212=-1/

X2312=-1/X2412=-1/X7161=-1)

X2214(#1) What is the typical payment?

X2314(#2)

X2414(#3) Code amount

X7164(#4) -1. Nothing

-2. No typical payment

0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4; no loan on car: X2206^=1/X2306^=1/X2406^=1/

X7155^=1; regular loan and regular payments: X2210=1

and X2213>0/X2310=1 and X2313>0/X2410=1 and X2413>0/

X7159=1 and X7162>0)

X2215(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X2315(#2) (And how often is it made?)

X2415(#3)

X7165(#4) Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year

12. Every two months

22. Varies

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4; no loan on car: X2206^=1/X2306^=1/X2406^=1/

X7155^=1; regular loan and regular payments: X2210=1

and X2213>0/X2310=1 and X2313>0/X2410=1 and X2413>0/

X7159=1 and X7162>0)

X7534(#1) Is this loan being paid off ahead of schedule, behind

X7533(#2) schedule, or are the payments about on schedule?

X7532(#3)

X7166(#4) 1. \*On schedule

2. \*Ahead of schedule

3. \*Behind schedule

0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4; no loan on car: X2206^=1/X2306^=1/X2406^=1/

X7155^=1; not a regular loan: X2210^=1/X2310^=1/

X2410^=1/X2410^=1/X7159^=1; no regular payment:

X2213<=0/X2313<=0/X2413<=0/X7161<=0)

In what month and year do you expect this loan to be repaid?

X2216(#1) Code month

X2316(#2) 1. \*January

X2416(#3) 2. \*February

X7167(#4) 3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4; no loan on car: X2206^=1/X2306^=1/X2406^=1/

X7155^=1; payments on schedule: X7534=1/X7533=1/X75323=1/

X7166=1)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X2217(#1) Code year (4 digit)

X2317(#2) 0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2417(#3) X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X7168(#4) X2202<4; no loan on car: X2206^=1/X2306^=1/X2406^=1/

X7155^=1; payments on schedule: X7534=1/X7533=1/X75323=1/

X7166=1)

X2218(#1) How much is still owed on this loan?

X2318(#2)

X2418(#3) Code amount

X7169(#4) 0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4; no loan on car: X2206^=1/X2306^=1/X2406^=1/

X7155^=1)

X2219(#1) What is the current annual rate of interest being charged

X2319(#2) on this loan?

X2419(#3)

X7170(#4) Code percent \* 100

-1. Nothing

0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4)

X2220(#1) Please look at the list of institutions you wrote down.

X2320(#2) Is the loan with any of the institutions on the list, or from

X2420(#3) someplace else?

X7171(#4)

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

ASK R TO UPDATE LIST IF A NEW INSTITUTION IS MENTIONED

AT THIS POINT./IF "SOMEPLACE ELSE":What type of institution

is that?)

Please look at the Institutions Card. Is the loan with any

of the institutions on the Institutions Card, or from

someplace else?

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

CHECK INSTITUTION CARD AND UPDATE IF A NEW INSTITUTION IS

MENTIONED AT THIS POINT./ IF "SOMEPLACE ELSE": What type of

institution is that?)

1. \*Institution 1

2. \*Institution 2

3. \*Institution 3

4. \*Institution 4

5. \*Institution 5

6. \*Institution 6

7. \*Institution 7

-7. \*OTHER (Coded using the MASTER INSTITUTION LIST)

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4)

The following codes show on the screen after at

least seven distinct institutions have been during

the course of the interview:

11. \*COMMERCIAL BANK; trust company

12. \*S&L/SAVINGS BANK

13. \*CREDIT UNION

14. \*FINANCE/LOAN CO

15. \*DEALER

20. \*PRIOR OWNER

21. \*AUTO FINANCE/GMAC/FORD CREDIT

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SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

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X9102(#1) Recode: type of institution

X9103(#2)

X9104(#3) See MASTER INSTITIUTION LIST for other codes (See X308)

X9215(#4) 0. Inap. (no owned cars etc.: X2201^=1/fewer than 2 cars:

X2202<2/fewer than 3 cars: X2202<3/fewer than 4 cars:

X2202<4)

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SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

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X2422(#5) How much are all the other such vehicles that you own worth

in today's prices?

How much is the other such vehicle that you own worth in

today's prices?

How much are all the other such vehicles that you and

others in your family living here own worth in today's

prices?

How much is the other such vehicle that you and others in

your family living here own worth in today's prices?

Code amount

0. Inap. (no owned cars etc.: X2201^=1; fewer than 5 cars:

X2202<5);

X8430(#5) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (no owned cars etc.: X2201^=1; did not

break off early in grid)

X2423(#5) Not counting loans I have already recorded, is any money

still owed on loans for these vehicles?

Not counting loans I have already recorded, is any money

still owed on a loan for this vehicle?

1. \*YES

5. \*NO

0. Inap. (no owned cars etc.: X2201^=1; fewer than 5 cars:

X2202<5);

X8431(#5) Original value for Rs who did not provide complete

information within the grid structure (see introduction)

1. \*YES

5. \*NO

0. Inap. (no owned cars etc.: X2201^=1; did not

break off early in grid)

X2424(#5) Altogether, about how much is still owed on these loans?

Altogether, about how much is still owed on this loan?

Code amount

0. Inap. (no owned cars etc.: X2201^=1; fewer than 5 cars:

X2202<5; no loan on car: X2423^=1);

X8432(#5) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (no owned cars etc.: X2201^=1; did not

break off early in grid; no money owned on residual

vehicles: X8430^=1)

X2425(#5) How much are the payments on these loans?

How much are the payments on this loan?

Code amount

-1. Nothing

-2. No regular payment

0. Inap. (no owned cars etc.: X2201^=1; fewer than 5 cars:

X2202<5; no loan on car: X2423^=1);

X2426(#5) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often is that amount paid?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. Lump sum; one payment only

11. \*Twice per year

12. Every two months

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (no owned cars etc.: X2201^=1; fewer than 5 cars:

X2202<5; no loan on car: X2423^=1);

X8433(#5) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (no owned cars etc.: X2201^=1; did not

break off early in grid; no money owned on residual

vehicles: X8430^=1)

X8434(#5) Original value of frequency.

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. Lump sum; one payment only

11. \*Twice per year

12. Every two months

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (no owned cars etc.: X2201^=1; did not

break off early in grid; no money owned on residual

vehicles: X8430^=1)

-----------------------------------------------------------------------------

OTHER OWNED VEHICLES

-----------------------------------------------------------------------------

GF

X2503 Do you own any other vehicles such as a motor home, RV,

motorcycle, boat, or airplane?

Do you or anyone in your family living here own any other

vehicles such as a motor home, RV, motorcycle, boat, or

airplane?

INTERVIEWER: INCLUDE ANIMAL TRAILERS, GOLF CARTS, SNOWMOBILES,

GLIDERS, ETC. DO NOT INCLUDE TRACTORS AND LAWN MOWERS

1. \*YES

5. \*NO

X2504 Altogether, how many of these other vehicles do you own?

Altogether, how many of these other vehicles do you or

someone in your family living here own?

Code number

0. Inap. (no other vehicles: X2503^=1)

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FOR THE PUBLIC DATA SET, TOP-CODED AT 5

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X6692 Originally reported value of X2504 (see introduction)

Code number

0. Inap. (no other vehicles: X2503^=1)

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FOR THE PUBLIC DATA SET, TOP-CODED AT 5

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-----------------------------------------------------------------------------

#1 refers to first other owned vehicle

#2 refers to second other owned vehicle

#3 refers to all remaining other owned vehicle

-----------------------------------------------------------------------------

X2505(#1) What type of vehicle is it?

X2605(#2)

What type of vehicle is the newest one?

What type of vehicle is the next one?

Is it a motor home, RV, motorcycle, boat, airplane, or what?

1. \*motor home

2. \*RV; recreation vehicle

3. \*airplane; helicopter

4. \*boat

6. Camper/(house) trailer (except 16,17)

9. Tractor

11. \*motorcycle; motor scooter

12. Snowmobile

13. Golf cart

14. Non-automobile off-road vehicle; kart, dragster

15. Miscellaneous construction vehicle

16. Horse trailer

17. Other trailer (e.g., boat trailers)

18. Non-boat water vehicle

19. Glider, hot air balloon, other airborne vehicle n.e.c.

20. Bus

-7. \*Other

0. Inap. (no other vehicles: X2503^=1/fewer than 2 other

vehicles: X2504<2/fewer than 3 other vehicles: X2404<3)

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FOR THE PUBLIC DATA SET, CODES 2 AND 6 ARE COMBINED

WITH CODE 1; CODES 4 AND 19 ARE COMBINED WITH CODE 3;

CODE 9 IS COMBINED WITH CODE 15; CODES 13 AND 14 ARE

COMBINED WITH CODE 12; CODE 16 IS COMBINED WITH CODE

17

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X2506(#1) About how much is this (vehicle type) worth?

X2606(#2)

About how much is this vehicle worth?

Code amount

0. Inap. (no other vehicles: X2503^=1/fewer than 2 other

vehicles: X2504<2/fewer than 3 other vehicles: X2404<3)

X2507(#1) Not counting any loans that I have already recorded, is any

X2607(#2) money still

owed on loans for this (vehicle type)?

owed on loans for this vehicle?

1. \*YES

5. \*NO

0. Inap. (no other vehicles: X2503^=1/fewer than 2 other

vehicles: X2504<2/fewer than 3 other vehicles: X2404<3)

In what month and year was the loan taken out?

X2508(#1) Code month

X2608(#2) 1. \*January

2. \*February

3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (no other vehicles: X2503^=1/fewer than 2 other

vehicles: X2504<2/fewer than 3 other vehicles: X2404<3;

no loan on vehicle: X2507^=1/X2607^=1)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X2509(#1) Code year (4 digits)

X2609(#2) 0. Inap. (no other vehicles: X2503^=1/fewer than 2 other

vehicles: X2504<2/fewer than 3 other vehicles: X2404<3;

no loan on vehicle: X2507^=1/X2607^=1)

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FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-20

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GF

X2510(#1) How much was borrowed or financed, not counting the

X2610(#2) finance charges?

IF R ONLY OWNS PART, RECORD ONLY LOAN TERMS THAT APPLY TO

THE PEU

Code amount

0. Inap. (no other vehicles: X2503^=1/fewer than 2 other

vehicles: X2504<2/fewer than 3 other vehicles: X2404<3;

no loan on vehicle: X2507^=1/X2607^=1)

X2511(#1) Is this a regular installment loan where you pay a fixed

X2611(#2) dollar amount each month for a fixed number of months until

the loan is repaid, or some other kind?

1. \*Regular Installment

2. \*Other Kind

0. Inap. (no other vehicles: X2503^=1/fewer than 2 other

vehicles: X2504<2/fewer than 3 other vehicles: X2404<3;

no loan on vehicle: X2507^=1/X2607^=1)

How many monthly payments or years were agreed upon when

the loan was received?

X2513(#1) Code number of years

X2613(#2) -1. No set number of years

-7. Unable to calculate from number of payments

0. Inap. (no other vehicles: X2503^=1/fewer than 2 other

vehicles: X2504<2/fewer than 3 other vehicles: X2404<3;

no loan on vehicle: X2507^=1/X2607^=1; not a regular

loan: X2511^=1/X2611^=1)

X2512(#1) Code number of payments

X2612(#2) -1. No set number of payments

-7. Unable to calculate from number of years

0. Inap. (no other vehicles: X2503^=1/fewer than 2 other

vehicles: X2504<2/fewer than 3 other vehicles: X2404<3;

no loan on vehicle: X2507^=1/X2607^=1; not a regular

loan: X2511^=1/X2611^=1)

X9165(#1) Recode: term of loan in months

X9166(#2) -1. No set number of years/payments

-7. Unable to calculate from number of years/payments

0. Inap. (no other vehicles: X2503^=1/fewer than 2 other

vehicles: X2504<2/fewer than 3 other vehicles: X2404<3;

no loan on vehicle: X2507^=1/X2607^=1; not a regular

loan: X2511^=1/X2611^=1)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X2514(#1) How much are the payments?

X2614(#2)

Code amount

-1. Nothing

-2. No regular payment

0. Inap. (no other vehicles: X2503^=1/fewer than 2 other

vehicles: X2504<2/fewer than 3 other vehicles: X2404<3;

no loan on vehicle: X2507^=1/X2607^=1; not a regular

loan: X2511^=1/X2611^=1; no set number of payments:

X2512=-1/X2612=-1)

X7531(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X7530(#2) (And how often are they due?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. Lump sum; one payment only

11. \*Twice per year

12. Every two months

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (no other vehicles: X2503^=1/fewer than 2 other

vehicles: X2504<2/fewer than 3 other vehicles: X2404<3;

no loan on vehicle: X2507^=1/X2607^=1; not a regular

loan: X2511^=1/X2611^=1; no set number of payments:

X2512=-1/X2612=-1)

X2515(#1) What is the typical payment?

X2615(#2)

Code amount

-1. Nothing

-2. No typical payment

0. Inap. (no other vehicles: X2503^=1/fewer than 2 other

vehicles: X2504<2/fewer than 3 other vehicles: X2404<3;

no loan on vehicle: X2507^=1/X2607^=1; regular loan and

regular payments: X2511=1 and X2514>0/X2611=1 and

X2614>0)

X2516(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X2616(#2) (And how often is it made?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. Lump sum; one payment only

11. \*Twice per year

12. Every two months

22. Varies

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (no other vehicles: X2503^=1/fewer than 2 other

vehicles: X2504<2/fewer than 3 other vehicles: X2404<3;

no loan on vehicle: X2507^=1/X2607^=1; regular loan and

regular payments: X2511=1 and X2514>0/X2611=1 and

X2614>0)

X7529(#1) Is this loan being paid off ahead of schedule, behind

X7528(#2) schedule, or are the payments about on schedule?

1. \*On schedule

2. \*Ahead of schedule

3. \*Behind schedule

0. Inap. (no other vehicles: X2503^=1/fewer than 2 other

vehicles: X2504<2/fewer than 3 other vehicles: X2404<3;

no loan on vehicle: X2507^=1/X2607^=1; not a regular

loan: X2511^=1/X2611^=1; no regular payment:

X2514<=0/X2614<=0)

In what month and year do you expect this loan to be repaid?

X2517(#1) Code month

X2617(#2) 1. \*January

2. \*February

3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (no other vehicles: X2503^=1/fewer than 2 other

vehicles: X2504<2/fewer than 3 other vehicles: X2404<3;

no loan on vehicle: X2507^=1/X2607^=1; payments on

schedule: X7529=1/X7528=1)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X2518(#1) Code year

X2618(#2) 0. Inap. (no other vehicles: X2503^=1/fewer than 2 other

vehicles: X2504<2/fewer than 3 other vehicles: X2404<3;

no loan on vehicle: X2507^=1/X2607^=1; payments on

schedule: X7529=1/X7528=1)

X2519(#1) How much is still owed on this loan?

X2619(#2)

Code amount

0. Inap. (no other vehicles: X2503^=1/fewer than 2 other

vehicles: X2504<2/fewer than 3 other vehicles: X2404<3;

no loan on vehicle: X2507^=1/X2607^=1)

X2520(#1) What is the current annual rate of interest being charged

X2620(#2) on this loan?

Code percent \* 100

-1. Nothing

0. Inap. (no other vehicles: X2503^=1/fewer than 2 other

vehicles: X2504<2/fewer than 3 other vehicles: X2404<3;

no loan on vehicle: X2507^=1/X2607^=1)

X2521(#1) Please look at the list of institutions you wrote down.

X2621(#2) Is the loan with any of the institutions on the list, or from

someplace else?

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

ASK R TO UPDATE LIST IF A NEW INSTITUTION IS MENTIONED

AT THIS POINT./IF "SOMEPLACE ELSE":What type of institution

is that?)

Please look at the Institutions Card. Is the loan with any

of the institutions on the Institutions Card, or from

someplace else?

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

CHECK INSTITUTION CARD AND UPDATE IF A NEW INSTITUTION IS

MENTIONED AT THIS POINT./ IF "SOMEPLACE ELSE": What type of

institution is that?)

1. \*Institution 1

2. \*Institution 2

3. \*Institution 3

4. \*Institution 4

5. \*Institution 5

6. \*Institution 6

7. \*Institution 7

-7. \*OTHER (Coded using the MASTER INSTITUTION LIST)

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (no other vehicles: X2503^=1/fewer than 2 other

vehicles: X2504<2/fewer than 3 other vehicles: X2404<3;

no loan on vehicle: X2507^=1/X2607^=1)

The following codes show on the screen after at

least seven distinct institutions have been during

the course of the interview:

11. \*COMMERCIAL BANK; trust company

12. \*S&L/SAVINGS BANK

13. \*CREDIT UNION

14. \*FINANCE/LOAN CO

17. \*BROKERAGE

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

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X9105(#1) Recode: type of institution

X9106(#2)

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (no other vehicles: X2503^=1/fewer than 2 other

vehicles: X2504<2/fewer than 3 other vehicles: X2404<3;

no loan on vehicle: X2507^=1/X2607^=1)

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SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

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X2623(#3) How much are all the other such vehicles that you own worth?

How much is the other such vehicle that you own worth?

How much are all the other such vehicles that you and

others in your family living here own worth?

How much is the other such vehicle that you and others in

your family living here own worth?

Code amount

0. Inap. (no other vehicles: X2503^=1; fewer than 3 other

vehicles: X2504<2)

X8435(#3) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (no other vehicles: X2503^=1; did not

break off early in grid)

X2624(#3) Not counting loans I have already recorded, is any money

still owed on loans for these vehicles?

Not counting loans I have already recorded, is any money

still owed on loans for this vehicle?

1. \*YES

5. \*NO

0. Inap. (no other vehicles: X2503^=1; fewer than 3 other

vehicles: X2504<2)

X8436(#3) Original value for Rs who did not provide complete

information within the grid structure (see introduction)

1. \*YES

5. \*NO

0. Inap. (no other vehicles: X2503^=1; did not

break off early in grid)

X2625(#3) Altogether, about how much is still owed on these loans?

Altogether, about how much is still owed on this loan?

Code amount

0. Inap. (no other vehicles: X2503^=1; fewer than 3 other

vehicles: X2504<2; no money owed on vehicle: X2624^=1)

X8437(#3) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (no other vehicles: X2503^=1; did not

break off early in grid; no loans on residual

vehicles: X8436^=1)

X2626(#3) How much are the payments on these loans?

How much are the payments on this loan?

Code amount

-1. Nothing

-2. No regular payment

0. Inap. (no other vehicles: X2503^=1; fewer than 3 other

vehicles: X2504<2; no money owed on vehicle: X2624^=1)

X2627(#3) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often is that amount paid?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. Lump sum; one payment only

11. \*Twice per year

12. Every two months

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (no other vehicles: X2503^=1; fewer than 3 other

vehicles: X2504<2; no money owed on vehicle: X2624^=1)

X8438(#3) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (no other vehicles: X2503^=1; did not

break off early in grid; no loans on residual

vehicles: X8436^=1)

X8439(#3) Original value of frequency.

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year

12. Every two months

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (no other vehicles: X2503^=1; fewer than 3 other

vehicles: X2504<2; no money owed on vehicle: X2624^=1)

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EDUCATION LOANS

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X7801 Do you owe any money or have any loans for educational

expenses?

Do you and your family living here owe any money or have

any loans for educational expenses?

IF YES: Please do not include any credit cards or other

loans I have already recorded.

DO NOT INCLUDE TUITION BILLS THAT HAVE ARRIVED BUT ARE NOT YET PAID.

1. \*YES

5. \*NO

X7802 How many such loans are there?

IF ORIGINALLY MANY LOANS, BUT NOW CONSOLIDATED, RECORD THE

CONSOLIDATED NUMBER.

IF MULTIPLE LOANS FROM ONE SOURCE THAT ARE TREATED BY THE

LENDER AS ONE ACCOUNT, TREAT AS ONE LOAN HERE.

Code number

0. Inap. (no education loans: X7801^=1)

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FOR THE PUBLIC DATA SET, TOP-CODED AT 7

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X6693 Originally reported value of X7802 (see introduction)

Code number

0. Inap. (no education loans: X7801^=1)

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FOR THE PUBLIC DATA SET, TOP-CODED AT 7

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-----------------------------------------------------------------------------

#1 refers to first education loan

#2 refers to second education loan

#3 refers to third education

#4 refers to fourth education

#5 refers to fifth education

#6 refers to sixth education

#7 refers to all remaining education loans

-----------------------------------------------------------------------------

In what month and year was this loan taken out?

About the largest loan, in what month and year was

this loan taken out?

About the next education loan, in what month and year was

this loan taken out?

IF LOAN WAS CONSOLIDATED, ASK FOR THE DATE OF CONSOLIDATION.

X7803(#1) Code month

X7826(#2) 1. \*January

X7849(#3) 2. \*February

X7903(#4) 3. \*March

X7926(#5) 4. \*April

X7949(#6) 5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7802<6)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X7804(#1) Code year (4 digits)

X7827(#2) 0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7850(#3) X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7904(#4) X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7927(#5) X7802<6)

X7950(#6)

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FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-20

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X7805(#1) How much was borrowed or financed, not counting the finance

X7828(#2) charges?

X7851(#3)

X7905(#4) Code amount

X7928(#5) 0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7951(#6) X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7802<6)

X7806(#1) Are you paying on this loan now?

X7829(#2)

X7852(#3) 1. \*YES

X7906(#4) 5. \*NO

X7929(#5) 0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7952(#6) X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7802<6)

X7173(#1) Are the payments on this loan deferred?

X7174(#2)

X7175(#3) 1. \*YES

X7176(#4) 5. \*NO

X7177(#5) 0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7178(#6) X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7802<6; paying on loan now: X7806^=5/X7829^=5/X7852^=5/

X7806^=5;/X7929^=5/X7952^=5)

When will you start paying on this loan?

X7807(#1) Code month

X7830(#2) 1. \*January

X7853(#3) 2. \*February

X7907(#4) 3. \*March

X7930(#5) 4. \*April

X7953(#6) 5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7802<6; paying on loan now: X7806^=5/X7829^=5/X7852^=5/

X7806^=5;/X7929^=5/X7952^=5; payments not deferred:

X7173^=1/X7174^=1/X7175^=1/X7176^=1/X7177^=1/X7178^=1)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X7808(#1) Code year (4 digits)

X7831(#2)

X7854(#3) 0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7908(#4) X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7931(#5) X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7954(#6) X7802<6; paying on loan now: X7806^=5/X7829^=5/X7852^=5/

X7806^=5;/X7929^=5/X7952^=5; payments not deferred:

X7173^=1/X7174^=1/X7175^=1/X7176^=1/X7177^=1/X7178^=1)

X7809(#1) Is this loan accumulating interest which you will have to

X7832(#2) pay?

X7855(#3)

X7909(#4) 1. \*YES

X7932(#5) 5. \*NO

X7955(#6) 0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7802<6; paying on loan now: X7806^=5/X7829^=5/X7852^=5/

X7806^=5;/X7929^=5/X7952^=5; payments not deferred:

X7173^=1/X7174^=1/X7175^=1/X7176^=1/X7177^=1/X7178^=1)

When did you start paying on this loan?

(TAKE MOST RECENT TIME R BEGAN PAYING ON LOAN).

When did you last make payments on this loan?

X7810(#1) Code month

X7833(#2) 1. \*January

X7856(#3) 2. \*February

X7910(#4) 3. \*March

X7933(#5) 4. \*April

X7956(#6) 5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7802<6; not paying on loan now and payments deferred:

X7806=5 & X7173=1/X7829=5 and X7174=1/X7852=5 and X7175=1/

X7906=5 & X7176=1/X7929=5 and X7177=1/X7952=5 and X7178=1)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X7811(#1) Code year

X7834(#2) 0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7857(#3) X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7911(#4) X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7934(#5) X7802<6; not paying on loan now and payments deferred:

X7957(#6) X7806=5 & X7173=1/X7829=5 and X7174=1/X7852=5 and X7175=1/

X7906=5 & X7176=1/X7929=5 and X7177=1/X7952=5 and X7178=1)

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FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-20

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X7812(#1) Is this a regular installment loan where you pay a fixed

X7835(#2) dollar amount each month for a fixed number of months until

X7858(#3) the loan is repaid,or some other kind?

X7912(#4)

X7935(#5) 1. \*Regular Installment

X7958(#6) 2 \*Other Kind

0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7802<6; not paying on loan now and payments deferred:

X7806=5 & X7173=1/X7829=5 and X7174=1/X7852=5 and X7175=1/

X7906=5 & X7176=1/X7929=5 and X7177=1/X7952=5 and X7178=1)

How many monthly payments or years were agreed upon when

the loan was received?

X7813(#1) Code number of years

X7836(#2) -1. No set number of years

X7859(#3) -7. Unable to calculate from number of payments

X7913(#4) 0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7936(#5) X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7959(#6) X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7802<6; not paying on loan now and payments deferred:

X7806=5 & X7173=1/X7829=5 and X7174=1/X7852=5 and X7175=1/

X7906=5 & X7176=1/X7929=5 and X7177=1/X7952=5 and X7178=1;

not a regular loan: X7812^=1/X7835^=1/X7858^=1/X7912^=1/

X7935^=1/X7958^=1);

X7814(#1) Code number of payments

X7837(#2) -1. No set number of payments

X7860(#3) -7. Unable to calculate from number of years

X7914(#4) 0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7937(#5) X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7960(#6) X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7802<6; not paying on loan now and payments deferred:

X7806=5 & X7173=1/X7829=5 and X7174=1/X7852=5 and X7175=1/

X7906=5 & X7176=1/X7929=5 and X7177=1/X7952=5 and X7178=1;

not a regular loan: X7812^=1/X7835^=1/X7858^=1/X7912^=1/

X7935^=1/X7958^=1);

X9173(#1) Recode: term of loan in months

X9174(#2) -1. No set number of years/payments

X9175(#3) -7. Unable to calculate from number of years/payments

X9176(#4) 0. Inap. (no education loans: X7801^=1/less than 2 loans;

X9177(#5) X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X9178(#6) X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7802<6; not paying on loan now and payments deferred:

X7806=5 & X7173=1/X7829=5 and X7174=1/X7852=5 and X7175=1/

X7906=5 & X7176=1/X7929=5 and X7177=1/X7952=5 and X7178=1;

not a regular loan: X7812^=1/X7835^=1/X7858^=1/X7912^=1/

X7935^=1/X7958^=1);

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NOT INCLUDED IN THE PUBLIC DATA SET

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X7815(#1) How much are the payments?

X7838(#2)

X7861(#3) Code amount

X7915(#4) -1. Nothing

X7938(#5) -2. No regular payment

X7961(#6) 0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7802<6; not paying on loan now and payments deferred:

X7806=5 & X7173=1/X7829=5 and X7174=1/X7852=5 and X7175=1/

X7906=5 & X7176=1/X7929=5 and X7177=1/X7952=5 and X7178=1;

not a regular loan: X7812^=1/X7835^=1/X7858^=1/X7912^=1/

X7935^=1/X7958^=1; no set number of payments: X7813=-1/

X7836=-1/X7859=-1/X7913=-1/X7936=-1/X7959=-1)

X7816(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X7839(#2) (And how often are they made?)

X7862(#3)

X7916(#4) Code frequency

X7939(#5) 2. \*Week

X7962(#6) 3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. Lump sum; one payment only

11. \*Twice per year

12. Every two months

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7802<6; not paying on loan now and payments deferred:

X7806=5 & X7173=1/X7829=5 and X7174=1/X7852=5 and X7175=1/

X7906=5 & X7176=1/X7929=5 and X7177=1/X7952=5 and X7178=1;

not a regular loan: X7812^=1/X7835^=1/X7858^=1/X7912^=1/

X7935^=1/X7958^=1; no set number of payments: X7813=-1/

X7836=-1/X7859=-1/X7913=-1/X7936=-1/X7959=-1)

X7817(#1) What is the typical payment?

X7840(#2)

X7863(#3) Code amount

X7917(#4) -1. Nothing

X7940(#5) -2. No typical payment

X7963(#6) 0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7802<6; not paying on loan now and payments deferred:

X7806=5 & X7173=1/X7829=5 and X7174=1/X7852=5 and X7175=1/

X7906=5 & X7176=1/X7929=5 and X7177=1/X7952=5 and X7178=1;

regular loan and regular payments: X7812=1 and X7815>0/

X7835=1 and X7838>0/X7858=1 and X7861>0/ X7912=1 and

X7915>0/X7935=1 and X7938>0/X7958=1 and X7961>0)

X7818(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X7841(#2) (And how often is it made?)

X7864(#3)

X7918(#4) Code frequency

X7941(#5) 2. \*Week

X7964(#6) 3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. Lump sum; one payment only

11. \*Twice per year

12. Every two months

22. Varies

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7802<6; not paying on loan now and payments deferred:

X7806=5 & X7173=1/X7829=5 and X7174=1/X7852=5 and X7175=1/

X7906=5 & X7176=1/X7929=5 and X7177=1/X7952=5 and X7178=1;

regular loan and regular payments: X7812=1 and X7815>0/

X7835=1 and X7838>0/X7858=1 and X7861>0/ X7912=1 and

X7915>0/X7935=1 and X7938>0/X7958=1 and X7961>0)

X7821(#1) Is this loan being paid off ahead of schedule, behind

X7844(#2) schedule, or are the payments about on schedule?

X7867(#3)

X7921(#4) 1. \*On schedule

X7944(#5) 2. \*Ahead of schedule

X7967(#6) 3. \*Behind schedule

0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7802<6; not paying on loan now and payments deferred:

X7806=5 & X7173=1/X7829=5 and X7174=1/X7852=5 and X7175=1/

X7906=5 & X7176=1/X7929=5 and X7177=1/X7952=5 and X7178=1;

not a regular loan: X7812^=1/X7835^=1/X7858^=1/X7912^=1/

X7935^=1/X7958^=1; no set number of payments: X7813=-1/

X7836=-1/X7859=-1/X7913=-1/X7936=-1/X7959=-1)

In what month and year do you expect this loan to be repaid?

X7819(#1) Code month

X7842(#2) 1. \*January

X7865(#3) 2. \*February

X7919(#4) 3. \*March

X7942(#5) 4. \*April

X7965(#6) 5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7802<6; not paying on loan now and payments deferred:

X7806=5 & X7173=1/X7829=5 and X7174=1/X7852=5 and X7175=1/

X7806=5 & X7173=1/X7829=5 and X7174=1/X7852=5 and X7175=1/

X7906=5 & X7176=1/X7929=5 and X7177=1/X7952=5 and X7178=1;

payments on schedule: X7821=1/X7844=1/X7867=1/X7921=1/

X7944=1/X7967=1)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X7820(#1) Code year (4 digit)

X7843(#2) 0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7866(#3) X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7920(#4) X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7943(#5) X7802<6; not paying on loan now and payments deferred:

X7966(#6) X7806=5 & X7173=1/X7829=5 and X7174=1/X7852=5 and X7175=1/

X7806=5 & X7173=1/X7829=5 and X7174=1/X7852=5 and X7175=1/

X7906=5 & X7176=1/X7929=5 and X7177=1/X7952=5 and X7178=1;

payments on schedule: X7821=1/X7844=1/X7867=1/X7921=1/

X7944=1/X7967=1)

X7822(#1) What is the current annual rate of interest being charged

X7845(#2) on this loan?

X7868(#3)

X7922(#4) Code percent \* 100

X7945(#5) -1. Nothing

X7968(#6) 0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7802<6; not paying on loan now and payments deferred:

X7806=5 & X7173=1/X7829=5 and X7174=1/X7852=5 and X7175=1/

X7806=5 & X7173=1/X7829=5 and X7174=1/X7852=5 and X7175=1/

X7906=5 & X7176=1/X7929=5 and X7177=1/X7952=5 and X7178=1;

interest not accumulating: X7809=5/X7832=5/X7855=5/

X7909=5/X7932=5/X7955=5)

X7823(#1) Please look at the list of institutions you wrote down.

X7846(#2) Is the loan with any of the institutions on the list, or from

X7869(#3) someplace else?

X7923(#4)

X7946(#5) IF INSTITUTIONS CARD: Which institution?

X7969(#6) (IF "SOMEPLACE ELSE": What institution is that?

ASK R TO UPDATE LIST IF A NEW INSTITUTION IS MENTIONED

AT THIS POINT./IF "SOMEPLACE ELSE":What type of institution

is that?)

Please look at the Institutions Card. Is the loan with any

of the institutions on the Institutions Card, or from

someplace else?

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

CHECK INSTITUTION CARD AND UPDATE IF A NEW INSTITUTION IS

MENTIONED AT THIS POINT./ IF "SOMEPLACE ELSE": What type of

institution is that?)

1. \*Institution 1

2. \*Institution 2

3. \*Institution 3

4. \*Institution 4

5. \*Institution 5

6. \*Institution 6

7. \*Institution 7

-7. \*OTHER (Coded using the MASTER INSTITUTION LIST)

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7802<6)

The following codes show on the screen after at

least seven distinct institutions have been during

the course of the interview:

11. \*COMMERCIAL BANK; trust company

12. \*S&L/SAVINGS BANK

13. \*CREDIT UNION

14. \*FINANCE/LOAN CO

16. \*BROKERAGE

32. \*COLLEGE/UNIVERSITY

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SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X9203(#1) Recode: type of institution

X9204(#2)

X9205(#3) See MASTER INSTITIUTION LIST for other codes (See X308)

X9206(#4) 0. Inap. (no education loans: X7801^=1/less than 2 loans;

X9207(#5) X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X9208(#6) X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7802<6)

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SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

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X7824(#1) How much is still owed on this loan?

X7847(#2)

X7870(#3) Code amount

X7924(#4) 0. Inap. (no education loans: X7801^=1/less than 2 loans;

X7947(#5) X7802<2/less than 3 loans: X7802<3/less than 4 loans:

X7970(#6) X7802<4/less than 5 loans: X7802<5/less than 6 loans:

X7802<6)

X7179(#7) How much in total is owed on all the remaining loans?

Code amount

0. Inap. (no education loans: X7801^=1; less than 7 loans)

X8440(#7) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (no education loans: X7801^=1; did not break off

early in grid)

X7180(#7) How much in total are all the payments you are making on

all the remaining loans?

Code amount

-1. Nothing

-2. No regular payment

0. Inap. (no education loans: X7801^=1; less than 7 loans)

X7181(#7) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often is that amount paid?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. Lump sum; one payment only

11. \*Twice per year

12. Every two months

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (no education loans: X7801^=1; less than 7 loans)

X8441(#7) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

-1. Nothing

-2. No regular payment

0. Inap. (no education loans: X7801^=1; did not break off

early in grid)

X8442(#7) Original value of frequency.

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. Lump sum; one payment only

11. \*Twice per year

12. Every two months

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (no education loans: X7801^=1; did not break off

early in grid)

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-----------------------------------------------------------------------------

OTHER CONSUMER LOANS

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

X7182 Do you (or anyone in your family living here)

have any other loans?

(These may be loans for household appliances, furniture, hobby

or recreational equipment, medical bills, loans from

friends or relatives, loans for a business or investment,

or other loans.)

IF YES, SAY: Please do not include credit cards or loans I

have already recorded in detail.

DO NOT INCLUDE GIFTS/LOANS R IS NOT EXPECTED TO REPAY

DO NOT INCLUDE OUTSTANDING BILLS UNLESS THEY ARE MORE THAN

30 DAYS PAST DUE

1. \*YES

5. \*NO

NOTE: CARD 8 contains the following text in a vertical

column: "Loans for household applicances, furniture,"

"Loans for hobby or recreational equipment," "Loans for

medical bills," "Loans from friends or relatives," "Other

loans or money owed."

X2709 How many such loans do you have?

Code number

0. Inap. (no such loans: X7182=5)

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FOR THE PUBLIC DATA SET, TOP-CODED AT 7

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X6694 Originally reported value of X2709 (see introduction)

Code number

0. Inap. (no such loans: X7182=5)

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FOR THE PUBLIC DATA SET, TOP-CODED AT 7

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-----------------------------------------------------------------------------

#1 refers to first consumer loan

#2 refers to second consumer loan

#3 refers to third consumer loan

#4 refers to fourth consumer loan

#5 refers to fifth consumer loan

#6 refers to sixth consumer loan

#7 refers to all remaining consumer loans

-----------------------------------------------------------------------------

X2710(#1) What was the loan for?

X2727(#2)

X2810(#3) What was the largest loan for?

X2827(#4)

X2910(#5) What was the next of these other loans for?

X2927(#6)

See MASTER LOAN PURPOSE LIST at X6723

0. Inap. (no such loans: X7182=5/fewer than 2 loans: X2709<2/

fewer than 3 loans: X2709<3/fewer than 4 loans: X2709<4/

fewer than 5 loans: X2709<5/fewer than 6 loans: X2709<6)

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SEE MASTER LOAN PURPOSE LIST FOR INFORMATION ON CODE

COLLAPSING FOR LOAN PURPOSE VARIABLES FOR PUBLIC

DATA SET

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X6842(#1) Is this loan one that you told me about when we talked about

X6843(#2) your business?

X6844(#3)

X6845(#4) 1. \*YES

X6846(#5) 5. \*NO

X6847(#6) 6. Yes, link code created at X7551 etc.

7. Yes, partially reported earlier, link code created at X7551

8. Originally reported as YES, but no clear link

0. Inap. (no such loans: X7182=5/fewer than 2 loans: X2709<2/

fewer than 3 loans: X2709<3/fewer than 4 loans: X2709<4/

fewer than 5 loans: X2709<5/fewer than 6 loans: X2709<6;

no loans for/to a personally owned business reported

in the section about personal businesses that was not

reported earlier: X3125=(0, 5) and X3225=(0, 5) and

X3325=(0, 5) and X3120=(0, 5) and X3220=(0, 5) and

X3320=(0, 5)

In what month and year was this loan taken out?

X2712(#1) Code month

X2729(#2) 1. \*January

X2812(#3) 2. \*February

X2829(#4) 3. \*March

X2912(#5) 4. \*April

X2929(#6) 5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (no such loans: X7182=5/fewer than 2 loans: X2709<2/

fewer than 3 loans: X2709<3/fewer than 4 loans: X2709<4/

fewer than 5 loans: X2709<5/fewer than 6 loans: X2709<6)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X2713(#1) Code year (4 digits)

X2730(#2) 0. Inap. (no such loans: X7182=5/fewer than 2 loans: X2709<2/

X2813(#3) fewer than 3 loans: X2709<3/fewer than 4 loans: X2709<4/

X2830(#4) fewer than 5 loans: X2709<5/fewer than 6 loans: X2709<6)

X2913(#5)

X2930(#6)

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FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-20

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X2714(#1) How much was borrowed or financed, not counting the

X2731(#2) finance charges?

X2814(#3)

X2831(#4) Code amount

X2914(#5) 0. Inap. (no such loans: X7182=5/fewer than 2 loans: X2709<2/

X2931(#6) fewer than 3 loans: X2709<3/fewer than 4 loans: X2709<4/

fewer than 5 loans: X2709<5/fewer than 6 loans: X2709<6)

X2715(#1) Is this a regular installment loan where you pay a fixed

X2732(#2) dollar amount each month for a fixed number of months until

X2815(#3) the loan is repaid, or some other kind?

X2832(#4)

X2915(#5) 1. \*Regular Installment

X2932(#6) 2. \*Other Kind

0. Inap. (no such loans: X7182=5/fewer than 2 loans: X2709<2/

fewer than 3 loans: X2709<3/fewer than 4 loans: X2709<4/

fewer than 5 loans: X2709<5/fewer than 6 loans: X2709<6)

How many monthly payments or years were agreed upon when

the loan was received?

X2717(#1) Code number of years

X2734(#2) -1. No set number of years

X2817(#3) -7. Unable to calculate from number of payments

X2834(#4) 0. Inap. (no such loans: X7182=5/fewer than 2 loans: X2709<2/

X2917(#5) fewer than 3 loans: X2709<3/fewer than 4 loans: X2709<4/

X2934(#6) fewer than 5 loans: X2709<5/fewer than 6 loans: X2709<6;

not a regular loan: X2715^=1/X2732^=1/X2815^=1/X2832^=1/

X2915^=1/X2932^=1)

X2716(#1) Code number of payments

X2733(#2) -1. No set number of payments

X2816(#3) -7. Unable to calculate from number of years

X2833(#4) 0. Inap. (no such loans: X7182=5/fewer than 2 loans: X2709<2/

X2916(#5) fewer than 3 loans: X2709<3/fewer than 4 loans: X2709<4/

X2933(#6) fewer than 5 loans: X2709<5/fewer than 6 loans: X2709<6;

not a regular loan: X2715^=1/X2732^=1/X2815^=1/X2832^=1/

X2915^=1/X2932^=1)

X9167(#1) Recode: term of loan in months

X9168(#2) -1. No set number of years/payments

X9169(#3) -7. Unable to calculate from number of years/payments

X9170(#4) 0. Inap. (no such loans: X7182=5/fewer than 2 loans: X2709<2/

X9171(#5) fewer than 3 loans: X2709<3/fewer than 4 loans: X2709<4/

X9172(#6) fewer than 5 loans: X2709<5/fewer than 6 loans: X2709<6;

not a regular loan: X2715^=1/X2732^=1/X2815^=1/X2832^=1/

X2915^=1/X2932^=1)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X2718(#1) How much are the payments?

X2735(#2)

X2818(#3) Code amount

X2835(#4) -1. Nothing

X2918(#5) -2. No typical payment

X2935(#6) 0. Inap. (no such loans: X7182=5/fewer than 2 loans: X2709<2/

fewer than 3 loans: X2709<3/fewer than 4 loans: X2709<4/

fewer than 5 loans: X2709<5/fewer than 6 loans: X2709<6;

not a regular loan: X2715^=1/X2732^=1/X2815^=1/X2832^=1/

X2915^=1/X2932^=1; no set number of payments: X2717=-1/

X2734=-1/X2817=-1/X2834=-1/X2917=-1/X2934=-1)

X7527(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X7526(#2) (And how often are they due?)

X7525(#3)

X7524(#4) Code frequency

X7523(#5) 2. \*Week

X7522(#6) 3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. Lump sum; one payment only

11. Twice per year

12. Every two months

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (no such loans: X7182=5/fewer than 2 loans: X2709<2/

fewer than 3 loans: X2709<3/fewer than 4 loans: X2709<4/

fewer than 5 loans: X2709<5/fewer than 6 loans: X2709<6;

not a regular loan: X2715^=1/X2732^=1/X2815^=1/X2832^=1/

X2915^=1/X2932^=1; no set number of payments: X2717=-1/

X2734=-1/X2817=-1/X2834=-1/X2917=-1/X2934=-1)

X2719(#1) What is the typical payment?

X2736(#2)

X2819(#3) Code amount

X2836(#4) -1. Nothing

X2919(#5) -2. No typical payment

X2936(#6) 0. Inap. (no such loans: X7182=5/fewer than 2 loans: X2709<2/

fewer than 3 loans: X2709<3/fewer than 4 loans: X2709<4/

fewer than 5 loans: X2709<5/fewer than 6 loans: X2709<6;

regular loan and regular payments: X2715=1 and X2718>0/

X2732=1 and X2735>0/X2815=1 and X2818>0/X2832=1 and

X2835>0/X2915=1 and X2918>0/X2932=1 and X2935>0)

X2720(#2) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X2737(#2) (And how often is it made?)

X2820(#3)

X2837(#4) Code frequency

X2920(#5) 2. \*Week

X2937(#6) 3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. Lump sum; one payment only

11. \*Twice per year

12. Every two months

22. Varies

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (no such loans: X7182=5/fewer than 2 loans: X2709<2/

fewer than 3 loans: X2709<3/fewer than 4 loans: X2709<4/

fewer than 5 loans: X2709<5/fewer than 6 loans: X2709<6;

regular loan and regular payments: X2715=1 and X2718>0/

X2732=1 and X2735>0/X2815=1 and X2818>0/X2832=1 and

X2835>0/X2915=1 and X2918>0/X2932=1 and X2935>0)

X7521(#1) Is this loan being paid off ahead of schedule, behind

X7520(#2) schedule, or are the payments about on schedule?

X7519(#3)

X7518(#4) 1. \*On schedule

X7517(#5) 2. \*Ahead of schedule

X7516(#6) 3. \*Behind schedule

0. Inap. (no such loans: X7182=5/fewer than 2 loans: X2709<2/

fewer than 3 loans: X2709<3/fewer than 4 loans: X2709<4/

fewer than 5 loans: X2709<5/fewer than 6 loans: X2709<6;

not a regular loan: X2715^=1/X2732^=1/X2815^=1/X2832^=1/

X2915^=1/X2932^=1; no regular payment: X2718<=0/

X2735<=0/X2818<=0/X2835<=0/X2918<=0/X2935<=0)

In what month and year do you expect this loan to be repaid?

X2721(#1) Code month

X2738(#2) 1. \*January

X2821(#3) 2. \*February

X2838(#4) 3. \*March

X2921(#5) 4. \*April

X2938(#6) 5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (no such loans: X7182=5/fewer than 2 loans: X2709<2/

fewer than 3 loans: X2709<3/fewer than 4 loans: X2709<4/

fewer than 5 loans: X2709<5/fewer than 6 loans: X2709<6;

payments on schedule: X7521=1/X7520=1/X7519=1/X7518=1/

X7517=1/X7516=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X2722(#1) Code year

X2739(#2) 0. Inap. (no such loans: X7182=5/fewer than 2 loans: X2709<2/

X2822(#3) fewer than 3 loans: X2709<3/fewer than 4 loans: X2709<4/

X2839(#4) fewer than 5 loans: X2709<5/fewer than 6 loans: X2709<6;

X2922(#5) payments on schedule: X7521=1/X7520=1/X7519=1/X7518=1/

X2939(#6) X7517=1/X7516=1)

X2723(#1) How much is still owed on this loan?

X2740(#2)

X2823(#3) Code amount

X2840(#4) 0. Inap. (no such loans: X7182=5/fewer than 2 loans: X2709<2/

X2923(#5) fewer than 3 loans: X2709<3/fewer than 4 loans: X2709<4/

X2940(#6) fewer than 5 loans: X2709<5/fewer than 6 loans: X2709<6)

X2724(#1) What is the current annual rate of interest being charged

X2741(#2) on this loan?

X2824(#3)

X2841(#4) Code percent \* 100

X2924(#5) 0. Inap. (no such loans: X7182=5/fewer than 2 loans: X2709<2/

X2941(#6) fewer than 3 loans: X2709<3/fewer than 4 loans: X2709<4/

fewer than 5 loans: X2709<5/fewer than 6 loans: X2709<6)

X2725(#1) Please look at the list of institutions you wrote down.

X2742(#2) Is the loan with any of the institutions on the list, or from

X2825(#3) someplace else?

X2842(#4)

X2925(#5) IF INSTITUTIONS CARD: Which institution?

X2942(#6) (IF "SOMEPLACE ELSE": What institution is that?

ASK R TO UPDATE LIST IF A NEW INSTITUTION IS MENTIONED

AT THIS POINT./IF "SOMEPLACE ELSE":What type of institution

is that?)

Please look at the Institutions Card. Is the loan with any

of the institutions on the Institutions Card, or from

someplace else?

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

CHECK INSTITUTION CARD AND UPDATE IF A NEW INSTITUTION IS

MENTIONED AT THIS POINT./ IF "SOMEPLACE ELSE": What type of

institution is that?)

1. \*Institution 1

2. \*Institution 2

3. \*Institution 3

4. \*Institution 4

5. \*Institution 5

6. \*Institution 6

7. \*Institution 7

-7. \*OTHER (Coded using the MASTER INSTITUTION LIST)

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (no such loans: X7182=5/fewer than 2 loans: X2709<2/

fewer than 3 loans: X2709<3/fewer than 4 loans: X2709<4/

fewer than 5 loans: X2709<5/fewer than 6 loans: X2709<6)

The following codes show on the screen after at

least seven distinct institutions have been during

the course of the interview:

11. \*COMERCIAL BANK; trust company

12. \*S&L/SAVINGS BANK

13. \*CREDIT UNION

14. \*FINANCE/LOAN CO

16. \*BROKERAGE

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X9107(#1) Recode: type of institution

X9108(#2) See MASTER INSTITIUTION LIST for other codes (See X308)

X9109(#3) 0. Inap. (no such loans: X7182=5/fewer than 2 loans: X2709<2/

X9110(#4) fewer than 3 loans: X2709<3/fewer than 4 loans: X2709<4/

X9111(#5) fewer than 5 loans: X2709<5/fewer than 6 loans: X2709<6)

X9112(#6)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7183(#7) How much in total is owed on all the remaining loans?

Code amount

0. Inap. (no such loans: X7182=5; fewer than 7 loans: X2709<7)

X8443(#7) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (no such loans: X7182^=1; did not break off

early in grid)

X7184(#7) How much in total are all the payments you are making on all

the remaining loans?

Code amount

-1. Nothing

-2. No regular payment

0. Inap. (no such loans: X7182=5; fewer than 7 loans: X2709<7)

X7185(#7) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often is that amount paid?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. Lump sum; one payment only

11. \*Twice per year

12. Every two months

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (no such loans: X7182=5; fewer than 7 loans: X2709<7)

X8444(#7) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

-1. Nothing

-2. No regular payment

0. Inap. (no such loans: X7182=5; did not break off

early in grid)

X8445(#7) Original value of frequency.

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. Lump sum; one payment only

11. \*Twice per year

12. Every two months

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (no such loans: X7182=5; did not break off

early in grid)

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PAYMENTS ON SCHEDULE ON ALL TYPES OF LOANS

-----------------------------------------------------------------------------

GF

X7070 During the past year, have you (or anyone in your family

livinng here) borrowed money that was supposed to be repaid

out of your next paycheck?

1. \*YES

5. \*NO

X3004 Now thinking of all the various loan or mortgage payments

you made during the last year, were all the payments made the

way they were scheduled, or were payments on any of the

loans sometimes made later or missed?

1. \*All paid as scheduled or ahead of schedule

5. \*Sometimes got behind or missed payments

0. Inap. (no types of loans: X413=(0, -1) and X421=(0, -1)

and X424=(0, -1) and X427=(0, -1) and X430=(0, -1) and

X7577=5 and X723=(0, 5) and X830=(0, 5) and X931=(0, 5) and

X1101=5 and X1203=(0, 5) and X2206=(0, 5) and

X2306=(0, 5) and X2406=(0, 5) and X7155=(0, 5) and

X2507=(0, 5) and X2607=(0, 5) and X7182=5 and

X1711=(0, 5) and X1811=(0, 5) and X1911=(0, 5) and

X1416=(0, 5) and X1516=(0, 5) and X1616=(0, 5) and

X1620=(0, 5) and X8403=(0, 5) and X1032=(0, 5) and

X2005=(0, 5) and X8409=(0, 5) and X2015=(0, 5) and

X8419=(0, 5) and X2423=(0, 5) and X8431=(0, 5) and

X2624=(0, 5) and X8436=(0, 5) and X7801=5 and

X3120=(0, 5) and X3220=(0, 5) and X3320=(0, 5) and

X3125=(0, 5) and X3225=(0, 5) and X3325=(0, 5))

X3005 Were you ever behind in your payments by two months or more?

1. \*YES

5. \*NO

0. Inap. (no types of loans: X413=(0, -1) and X421=(0, -1)

and X424=(0, -1) and X427=(0, -1) and X430=(0, -1) and

X7577=5 and X723=(0, 5) and X830=(0, 5) and X931=(0, 5) and

X1101=5 and X1203=(0, 5) and X2206=(0, 5) and

X2306=(0, 5) and X2406=(0, 5) and X7155=(0, 5) and

X2507=(0, 5) and X2607=(0, 5) and X7182=5 and

X1711=(0, 5) and X1811=(0, 5) and X1911=(0, 5) and

X1416=(0, 5) and X1516=(0, 5) and X1616=(0, 5) and

X1620=(0, 5) and X8403=(0, 5) and X1032=(0, 5) and

X2005=(0, 5) and X8409=(0, 5) and X2015=(0, 5) and

X8419=(0, 5) and X2423=(0, 5) and X8431=(0, 5) and

X2624=(0, 5) and X8436=(0, 5) and X7801=5 and

X3120=(0, 5) and X3220=(0, 5) and X3320=(0, 5) and

X3125=(0, 5) and X3225=(0, 5) and X3325=(0, 5);

not late with payments: X3004=1)

X6772 Have you (or your husband/wife/partner) ever filed for bankruptcy?

1. \*YES

5. \*NO

When was that?

IF MORE THAN ONCE, ASK: When was the most recent time?

X6773 CODE YEARS AGO

-1. Less than a year

0. Inap. (never filed for bankruptcy: X6772=5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 25

ROUNDED TO NEAREST ODD INTEGER

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6774 CODE YEAR

0. Inap. (never filed for bankruptcy: X6772=5)

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FOR THE PUBLIC DATA SET, ADJUSTED TO CORRESPOND TO

X6773

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MISCELLANEOUS OPINION VARIABLES

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GF

(#1-#6 in order reported by R)

X3006(#1) Now I'd like to ask you some questions about your attitudes

X3007(#2) about savings. People have different reasons for saving, even

X7513(#3) though they may not be saving all the time. What are your most

X7514(#4) important reasons for saving?

X7515(#5)

X6848(#6) Now I'd like to ask you some questions about your family's

attitudes about savings. People have different reasons for

saving, even though they may not be saving all the

time. What are your family's most important reasons for

saving?

What else?

TREAT "SAVING" AND "INVESTING" THE SAME.

1. Children's education; education of grandchildren

2. Own education; spouse/partner's education; education

-- not known for whom

3. "For the children/family", n.f.s.; "to help the kids

out"; estate

5. Wedding, Bar Mitzvah, and other ceremonies (except 17)

6. To have children/a family

9. To move (except 11)

11. Buying own house (code "summer cottage" in 12)

12. Purchase of cottage or second home for own use

13. Buy a car, boat or other vehicle

14. Home improvements/repairs

15. To travel; take vacations; take other time off

16. Buy durable household goods, appliances, home

furnishings; hobby and recreational items; for other

purchases not codable above or not further specified;

"buy things when we need/want them"; special occasions

17. Burial/funeral expenses

18. Charitable or religious contributions

20. "To enjoy life"

21. Buying (investing in) own business/farm; equipment for

business/farm

22. Retirement/old age

23. Reserves in case of unemployment

24. In case of illness; medical/dental expenses

25. Emergencies; "rainy days"; other unexpected needs; for

"security" and independence

26. Investments reasons (to get interest, to be

diversified, to buy other forms of assets)

27. To meet contractual commitments (debt repayment,

insurance, taxes, etc.), to pay off house

28. "To get ahead;" to advance standard of living

29. Ordinary living expenses/bills

30. Pay taxes

31. No particular reason (except 90, 91, 92)

32. "For the future"

33. Like to save

40. Don't wish to spend more

41. To give gifts; "Christmas"

90. Had extra income; saved because had the money left

over -- no other purpose specified

91. Wise/prudent thing to do; good discipline to save; habit

92. Liquidity; to have cash available/on hand

93. "Wealth preservation"; maintain lifestyle

-1. Don't/can't save; "have no money"

-7. Other

0. Inap. (only for X3007, X7513, X7514, X7515, X6848)

X3010 In the next five to ten years, are there any foreseeable

major expenses that you expect to have to pay for yourself,

such as educational expenses, purchase of a new home,

health care costs, support for other family members, or

anything else?

In the next five to ten years, are there any foreseeable

major expenses that you and your family expect to have to

pay for yourselves, such as educational expenses, purchase

of a new home, health care costs, support for other family

members, or anything else?

1. \*YES

5. \*NO

(#1-#6 in order reported by R)

X3011(#1) What kinds of obligations are these?

X3012(#2)

X3013(#3) CODE ALL THAT APPLY

X7512(#4)

X7511(#5) 1. \*EDUCATION FOR YOUR CHILDREN; (incl. step and adopted);

X6667(#6) grandchildren

2. \*EDUCATION FOR OTHERS; (incl. R & spouse/partner)

3. \*HEALTH CARE FOR SELF/SPOUSE/PARTNER

4. \*HEALTH CARE FOR OTHERS; (incl. elderly

parents/disabled child)

5. Health care/medical expenses -- not known for whom

11. General support for R/spouse/partner in Retirement or old age

12. General support for child/grandchild;

13. General support for parents

14. General support for others, or not known for whom

15. Baby

21. \*PURCHASE OF NEW HOME; (incl. vacation home)

22. Purchase of car or other large durable goods

23. Burial expenses; inheritance taxes

24. Taxes

25. Home repairs/improvements

26. Weddings, vacations, moving and other special expenditures

31. Business/investment; start/expand own business

32. Divorce, legal expenses

33. Major purchase

34. Charitable expense

41. Bills/living expenses, n.f.s.

-7. \*OTHER MAJOR FINANCIAL OBLIGATIONS

0. Inap. (no expected major expenses: X3010^=1)

NOTE: CARD 9 contains the following text in a vertical

column: "Education for your children," "Education for

others," "Future health care for self/spouse," "Health care

for others," "Purchase of new home," "Other major financial

obligation."

X7186 Are you saving for these expenses now?

Are you saving for this expense now?

1. \*YES

5. \*NO

6. \*ALREADY SAVED FOR IT

0. Inap. (no expected major expenses: X3010^=1)

X3008 IN PERSON VERSION:

(SHOW CARD 5)

In planning (your/your family's) saving and spending, which

of the time periods listed on this page is most important

to [you/you and your (husband/wife/partner)]?

TELEPHONE VERSION:

In planning (your/your family's) saving and spending, which

of the following is most important to [you/you and your

(husband/wife/partner)]: the next few months, the next

year, the next few years, the next 5 to 10 years, or longer

than 10 years?

1. \*NEXT FEW MONTHS

2. \*NEXT YEAR

3. \*NEXT FEW YEARS

4. \*NEXT 5-10 YEARS

5. \*LONGER THAN 10 YEARS

NOTE: CARD 5 contains the following text in a vertical

column: "Next few months," " Next year," "Next 5 to 10

years," "Longer than 10 years."

X3014 IN PERSON VERSION:

(SHOW CARD 6)

Which of the statements on this page comes closest to the

amount of financial risk that you and your

(husband/wife/partner) are willing to take when you save

or make investments?

Which of the statements on this page comes closest to the

amount of financial risk that you are willing to take when

you save or make investments?

READ RESPONSES IF NECESSARY.

TELEPHONE VERSION:

Which of the following statements comes closest to

describing the amount of financial risk that you and your

(husband/wife/partner) are willing to take when you save

or make investments?

Which of the following statements comes closest to the

describing the amount of financial risk that you are

willing to take when you save or make investments?

INTERVIEWER: IF MORE THAN ONE RESPONSE IS GIVEN USE THE

FIRST CATEGORY THAT APPLIES.

1. \*Take substantial financial risks expecting to earn

substantial returns

2. \*Take above average financial risks expecting to earn

above average returns

3. \*Take average financial risks expecting to earn

average returns

4. \*Not willing to take any financial risks

NOTE: CARD 6 contains the following text in a vertical

column: "Take substantial financial risks expecting to earn

substantial returns," "Take above average financial risks

expecting to earn above average returns," "Take average

financial risks expecting to earn average returns," "Not

willing to take any financial risks."

IN PERSON VERSION:

(SHOW CARD 7)

Which of the following statements on this page comes closest

to describing your and your (husband/wife/partner)'s

saving habits?

Which of the following statements on this page comes closest to

describing your saving habits?

READ RESPONSES IF NECESSARY.

TELEPHONE VERSION:

Which of the following statements comes closest to

describing your and your (husband/wife/partner)'s

saving habits?

Which of the following statements comes closest to

describing your saving habits?

TREAT "SAVING" AND "INVESTING" THE SAME.

INTERVIEWER: DO NOT PROBE FOR MORE THAN ONE RESPONSE.

ENTER MULTIPLE RESPONSES ONLY IF R VOLUNTEERS THEM

GF

X3015 \*Don't save - usually spend more than income

X3016 \*Don't save - usually spend about as much as income

X3017 \*Save whatever is left over at the end of the month -

no regular plan

X3018 \*Save income of one family member, spend the other

X3019 \*Spend regular income, save other income

X3020 \*Save regularly by putting money aside each month

1. Checked

5. Not checked

NOTE: CARD 7 contains the following text in a vertical

column: "Don't save -- Usually spend more than income,"

"Don't save -- Usually spend about as much as income,"

"Save whatever is left over at the end of each month -- No

regular plan," "Save income of one family member, spend the

other," "Save regularly by putting money aside each month."

X3023 Using any number from one to five, where one equals totally

inadequate and five equals very satisfactory, how would you

rate the retirement income you (receive or expect to

receive) from Social Security and job pensions?

INCLUDE 401(K) ACCOUNTS AND ALL OTHER TYPES OF PENSIONS

1. \*TOTALLY INADEQUATE

2.

3. \*ENOUGH TO MAINTAIN LIVING STANDARDS

4.

5. \*VERY SATISFACTORY

X7510 Over the past year, would you say that your spending

exceeded your income, that it was about the same as your

income, or that you spent less than your income?

Over the past year, would you say that your family's

spending exceeded your family's income, that it was about

the same as your income, or that you spent less than your

income?

(Spending should not include any investments you have made.)

IF DEBTS ARE BEING REPAID ON NET, TREAT THIS AS SPENDING

LESS THAN INCOME.

1. \*SPENDING EXCEEDED INCOME

2. \*SPENDING EQUALLED INCOME

3. \*SPENDING WAS LESS THAN INCOME

X7509 Did any of that spending include purchases of a home or

automobile or spending for any investments?

1. \*YES

5. \*NO

0. Inap. (spending less than income: X7510=3)

X7508 Including only monthly payments on your house or car and

leaving aside any spending on investments, over the past

year, would you say that your spending exceeded your

income, that it was about the same as your income, or that

you spent less than your income?

Including only monthly payments on your house or car and

leaving aside any spending on investments, over the past

year, would you say that your family's spending exceeded

your family's income, that it was about the same as your

income, or that you spent less than your income?

1. \*SPENDING EXCEEDED INCOME

2. \*SPENDING EQUALED INCOME

3. \*SPENDING WAS LESS THAN INCOME

0. Inap. (spending less than or equal to income:

X7510=2 or 3; spending did not include durables

purchases: X7509^=1)

X7507 To make up the difference, did you borrow additional money,

did you spend out of savings or investments, or did you do

something else?

1. \*BORROWED MONEY; (including used credit cards)

2. \*SPENT OUT OF SAVINGS/INVESTMENTS

3. Got behind on payments; didn't pay bills

4. Help from others

5. (Possible respondent error #1) Cut back on expenses

6. (Possible respondent error #2) Got additional income

8. Did nothing

12. Declared Bankruptcy

15. Sold assets

-7. \*OTHER

0. Inap. (spending less than or equal to income)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODE 12 IS COMBINED WITH

CODE 3

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

GF

X3024 Now I have some questions about your spending. How much do

[you and everyone else in your family/you] spend on food

that you use at home in an average week? (What is your

best estimate?)

IF R SHARES EXENSES WITH ROOMMATES NOT IN THE PEU, INCLUDE

ONLR R'S (FAMILY'S) SHARE.

THIS INCLUDES LUNCHES FOR WORK, ETC. MADE AT HOME.

INCLUDE FOOD PAID FOR USING FOOD STAMPS.

Code amount

X3025 INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And what period does that cover?)

Code frequency

1. Day

2. \*Week

3. \*Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only/in total

11. \*Twice per year; every six months

31. \*Twice a month

-1. Nothing

-7. \*Other

X3026 Do you have any food delivered to the door which isn't

included in that?

INCLUDE CARRY-OUT HERE.

1. \*YES

5. \*NO

GF

X3027 IF R SHARES EXENSES WITH ROOMMATES NOT IN THE PEU, INCLUDE

ONLR R'S (FAMILY'S) SHARE.

How much do you spend on that food?

Code amount

0. Inap. (No expenses for food delivered to the door: X....^=1)

-1. Nothing (for example, "Meals on Wheels")

X3028 INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And what period does that cover?)

Code frequency

1. Day

2. \*Week

3. \*Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only/in total

11. \*Twice per year; every six months

31. \*Twice a month

-1. Nothing

-7. \*Other

X3029 About how much do [you and everyone else in your

family/you] spend eating out? What is your best estimate?

THIS INCLUDES LUNCHES FOR WORK, ETC. MADE AT HOME.

Code amount

-1. Nothing

X3030 INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And what period does that cover?)

Code frequency

1. Day

2. \*Week

3. \*Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only/in total

11. \*Twice per year; every six months

31. \*Twice a month

-1. Nothing

-7. \*Other

X7187 About how much do you think you (and your family) need to

have in savings for emergencies and other unexpected things

that may come up?

Code amount

-1. Nothing

For the following statements, please say

whether you agree strongly, agree somewhat, neither agree

nor disagree, disagree somewhat, or disagree strongly:

X6788 Compared with other people of (my/our) generation and

background, [I/my (husband/wife/partner)] have been lucky

in (my/our) financial affairs.

1. \*AGREE STRONGLY

2. \*AGREE SOMEWHAT

3. \*NEITHER AGREE NOR DISAGREE

4. \*DISAGREE SOMEWHAT

5. \*DISAGREE STRONGLY

X6789 When the things that [I/my (husband/wife/partner)] own

increase in value, (I am/we are) more likely to spend money.

1. \*AGREE STRONGLY

2. \*AGREE SOMEWHAT

3. \*NEITHER AGREE NOR DISAGREE

4. \*DISAGREE SOMEWHAT

5. \*DISAGREE STRONGLY

X6443 In an emergency could you or your (husband/wife/partner)

get financial assistance of $3,000 or more from any friends

or relatives who do not live with you?

In an emergency could you get financial assistance of

$3,000 or more from any friends or relatives who do not

live with you?

1. \*YES

5. \*NO

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FINANCIAL ASSETS (ALSO INCLUDES SOME MISC. ASSETS AND DEBTS)

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-----------------------------------------------------------------------------

CHECKING ACCOUNTS

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X3501 Now I'd like to ask about different types of financial

assets that

you might have. First, do you have any checking accounts

at any type of institution?

you might have. First, do you or anyone in your family

living here have any checking accounts at any type of

institution?

IF YES: Please do not include any money market accounts

unless you use them regularly as checking accounts.

DO NOT INCLUDE LOAN ACCOUNTS OR CREDIT CARDS WITH

CHECK-WRITING PRIVILEGES.

DO NOT INCLUDE ACCOUNTS HELD FOR PEOPLE NOT IN THE FAMILY

LIVING HERE.

1. \*YES

5. \*NO

X3502 Have you ever had a checking account?

Have you or anyone in your family living here ever had a

checking account?

1. \*YES

5. \*NO

0. Inap. (R has a checking account: X3501=1)

X3503 IN PERSON VERSION:

(SHOW CARD 8)

Looking at this list, please tell me which is the most

important reason (you don't have/your family doesn't have)

a checking account.

READ RESPONSES IF NECESSARY.

TELEPHONE VERSION:

Please tell me which is the most important reason

(you don't have/your famaily doesn't have) a checking

account. Is it...

1. \*Because you don't write enough checks to make

it worthwhile

2. \*Because the minimum balance is too high

3. \*Because you do not like dealing with banks

4. \*Because service charges are too high

5. \*Because no bank has convenient hours or location

12. Checkbook has been/could be lost/stolen

13. Haven't gotten around to it

14. R has other account with checking privileges (money market

account, managed investment account, etc) (does not include

individuals who write checks for R)

15. R not allowed to have account (e.g., asset test for welfare)

16. Someone else writes checks for R or manages R's finances

20. R does not need/want a checking account, n.e.c.

21. Credit problems; bankruptcy; R does not meet depository's

qualifications for having an account

22. Concern about overdraft fees

95. Don't have (enough) money

-1. Can't manage/balance a checking account

-7. \*SOME OTHER REASON

0. Inap. (R has a checking account: X3501=1)

NOTE: CARD 8 contains the following text in a vertical

column: "Don't write enough checks to make it worthwhile,"

" Minimum balance too high," "Do not like dealing with

banks," "Service charges too high," "No bank has convenient

hours or location," "Some other reason."

X3504 How many checking accounts do you have?

How many checking accounts do you and your family living

here have?

(IF R ASKS: INCLUDE MONEY MARKET ACCOUNTS ONLY IF THEY ARE

USED AS CHECKING ACCOUNTS)

DO NOT INCLUDE BUSINESS ACCOUNTS.

DO NOT INCLUDE LOAN ACCOUNTS OR CREDIT CARDS WITH

CHECK-WRITING PRIVILEGES.

DO NOT INCLUDE ACCOUNTS HELD FOR PEOPLE NOT IN THE FAMILY

LIVING HERE.

Code number of accounts

0. Inap. (R has no checking account: X3501^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 10

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6695 Originally reported value of X3504 (see introduction)

Code number of accounts

0. Inap. (R has no checking account: X3501^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 10

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-----------------------------------------------------------------------------

#1 refers to the first checking account

#2 refers to the second checking account

#3 refers to the third checking account

#4 refers to the fourth checking account

#5 refers to the fifth checking account

#6 refers to the sixth checking account

#7 refers to the remaining checking accounts

-----------------------------------------------------------------------------

X3505(#1) Please look at the list of institutions you wrote down.

X3509(#2) Thinking about (your checking account/your main account,

X3513(#3) the one used to write most of your checks/the next checking

X3517(#4) account), is this account with any of the institutions

X3521(#5) on the list, or from someplace else?

X3525(#6)

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

ASK R TO UPDATE LIST IF A NEW INSTITUTION IS MENTIONED

AT THIS POINT./IF "SOMEPLACE ELSE":What type of institution

is that?)

Please look at the Institutions Card. Thinking about (your

checking account/your main account, the one used to write

most of your checks/the next checking account), is this

account with any of the institutions on the list, or from

someplace else?

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

CHECK INSTITUTION CARD AND UPDATE IF A NEW INSTITUTION IS

MENTIONED AT THIS POINT./ IF "SOMEPLACE ELSE": What type of

institution is that?)

1. \*Institution 1

2. \*Institution 2

3. \*Institution 3

4. \*Institution 4

5. \*Institution 5

6. \*Institution 6

7. \*Institution 7

-7. \*OTHER (Coded using the MASTER INSTITUTION LIST)

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (R has no checking account: X3501^=1/fewer than

2 accounts: X3504<2/fewer than 3 accounts: X3504<3/

fewer than 4 accounts: X3504<4/fewer than 5 accounts:

X3504<5/fewer than 6 accounts: X3504<6)

The following codes show on the screen after at

least seven distinct institutions have been during

the course of the interview:

11. \*COMMERCIAL BANK; trust company

12. \*S&L/SAV BANK

13. \*CREDIT UNION

16. \*BROKERAGE

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X9113(#1) Recode: type of institution

X9114(#2)

X9115(#3) See MASTER INSTITIUTION LIST for other codes (See X308)

X9116(#4) 0. Inap. ( (R has no checking account: X3501^=1/fewer than

X9117(#5) 2 accounts: X3504<2/fewer than 3 accounts: X3504<3/

X9118(#6) fewer than 4 accounts: X3504<4/fewer than 5 accounts:

X3504<5/fewer than 6 accounts: X3504<6)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X3506(#1) How much is in this account? What was the average over the

X3510(#2) last month?

X3514(#3)

X3518(#4) Code amount

X3522(#5) -1. Nothing

X3526(#6) 0. Inap. ( (R has no checking account: X3501^=1/fewer than

2 accounts: X3504<2/fewer than 3 accounts: X3504<3/

fewer than 4 accounts: X3504<4/fewer than 5 accounts:

X3504<5/fewer than 6 accounts: X3504<6)

X3507(#1) Is this a money market-type account?

X3511(#2)

X3515(#3) 1. \*YES

X3519(#4) 5. \*NO

X3523(#5) 0. Inap. (R has no checking account: X3501^=1/fewer than

X3527(#6) 2 accounts: X3504<2/fewer than 3 accounts: X3504<3/

fewer than 4 accounts: X3504<4/fewer than 5 accounts:

X3504<5/fewer than 6 accounts: X3504<6)

GF

X7071(#1) Is this account covered by federal deposit insurance?

X7072(#2)

X7073(#3) DEPOSIT INSURANCE IS PROVIDED BY THE FDIC (FEDERAL DEPOSIT

X7074(#4) INSURANCE CORPORATION) AND NCUSIF (NATIONAL CREDIT UNION

X7075(#5) SHARE INSURANCE FUND). IF THE INSTITUTION GOES BANKRUPT,

X7076(#6) DEPOSIT INSURANCE WOULD PAY UP TO $100,000 OF AN ACCOUNT

BALANCE.

1. \*YES

5. \*NO

0. Inap. (R has no checking account: X3501^=1/fewer than

2 accounts: X3504<2/fewer than 3 accounts: X3504<3/

fewer than 4 accounts: X3504<4/fewer than 5 accounts:

X3504<5/fewer than 6 accounts: X3504<6)

X7601(#1) Is this a joint checking account, or is the account in your

X7603(#2) name, in your husband's name, or something else?

X7605(#3)

X7607(#4) Is this a joint checking account, or is the account in your

X7609(#5) name, in your wife's name, or something else?

X7611(#6)

Is this a joint checking account, or is the account in your

name, in your partner's name, or something else?

Is this checking account in your name, or something else?

Is this a joint checking account, or is the account in your name?

1. \*Joint account; with spouse/partner

2. \*R's account

3. \*Spouse's/partner's account

4. Other family member's account

5. Child only

6. Child and respondent or spouse/partner

8. Other relative with respondent or spouse/partner

9. Unrelated person, n.f.s.

10. Unrelated person with respondent or spouse/partner

50. Trust account

51. Personal business account

-7. \*Other

0. Inap. (R has no checking account: X3501^=1/fewer than

2 accounts: X3504<2/fewer than 3 accounts: X3504<3/

fewer than 4 accounts: X3504<4/fewer than 5 accounts:

X3504<5/fewer than 6 accounts: X3504<6; R lives

alone: X7001=1)

X3529(#7) How much is in all your remaining checking accounts? (What

was the average over the last month?)

How much is in all your family's remaining checking accounts?

(What was the average over the last month?)

Code amount

-1. Nothing

0. Inap. (R has no checking account: X3501^=1; fewer than

7 accounts: X3504<7)

X8446(#7) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (no checking account: X3501^=1; did not

break off early in grid)

X3530 IN PERSON VERSION:

(SHOW CARD 9)

Which of the reasons on this card is the most important

reason (you/your family living here) chose the institution

that you did for your main checking account?

(Was it because of the location of their offices, because

they had the lowest fees or minimum balance requirement,

because you were able to obtain many services at one place,

because they offered safety and an absence of risk, or some

other reason?)

TELEPHONE VERSION:

What is the most important reason (you/your family

living here) chose the institution that you did for your

main checking account? Was it because of the location of

their offices, because they had the lowest fees or minimum

balance requirement, because you were able to obtain many

services at one place, because they offered safety and an

absence of risk, or some other reason?

1. Recommended; friend/family has account there

2. High interest rates; interest rates on deposits

3. \*LOCATION OF THEIR OFFICES

4. Other business done here

6. \*ABLE TO OBTAIN MANY SERVICES AT ONE PLACE

7. \*HAD THE LOWEST FEES/MINIMUM BALANCE REQUIREMENT

8. \*OFFERED SAFETY AND ABSENCE OF RISK

9. Other convenience mentions/payroll deduction/direct deposit

11. Personal relationship; they know me; R/spouse works

there; small institution; family member works there

12. Staff qualifications

13. Bank bought by another institution

14. Always done business there; banked there a long time;

other business done there

23. Advertisement

24. Convenient hours

25. No particular reason

26. No other institutions available

27. Gift for opening account; other promotion; special

benefits for group R belongs to (e.g., senior

citizens, sport team, etc.)

29. Reputation

30. Unable to open an account at another instituion

31. Dissatisfaction with previous institution

32. Good customer service

33. R prefers to deal with institutions of this type

34. Account opened for R as a child

35. Connection through work/school

36. Prefer a local institution

37. Needed to change institution

38. Offers online services or "electronic banking"

39. Ease of transfers between accounts; electronic

account management n.e.c.

41. Investment in institution

42. Diversification

43. Number/location of ATMs

-7. \*SOME OTHER REASON

0. Inap. (R has no checking account: X3501^=1)

NOTE: CARD 9 contains the following text in a vertical

column: "Location of their offices," "Had the lowest fees

or minimum balance requirement," "Able to obtain many

services at one place," "Offered safety and absence of

risk," "Some other reason."

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FOR THE PUBLIC DATA SET, CODE 41 IS COMBINED WITH

CODE 35

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X3531 For how many years have you done business with this

institution?

For how many years has someone in your family living here

done business with this institution?

Code number of years

-1. Less than a year

0. Inap. (R has no checking accounts: X3501^=1)

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FOR THE PUBLIC DATA SET, TOP-CODED 60

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-----------------------------------------------------------------------------

IRA/KEOGH ACCOUNTS

-----------------------------------------------------------------------------

X3601 As we continue through the interview, I will be asking you

about several types of retirement assets you may have, such

as Keoghs, IRAs or "Individual Retirement Accounts,"

annuities, and pensions and retirement accounts you may

have through a current or past job.

Here I would like to ask just about IRAs and Keogh

accounts. These may include accounts that you "rolled

over" into an IRA after leaving a previous job as well as

Roth IRAs, or any other type of IRA or Keogh account that

is not part of a retirement plan on a current or past job.

Please do not include IRA-SEP or IRA-SIMPLE accounts, which

we treat as job pensions.

Do you (or anyone in your family living here) have any

Keoghs or IRAs?

"EDUCATION IRAs" ARE SAVINGS ACCOUNTS.

1. \*YES

5. \*NO

-----------------------------------------------------------------------------

#1 refers to IRA/Keogh account of R

#2 refers to IRA/Keogh account of spouse/partner

#3 refers to IRA/Keogh account of other PEU member

-----------------------------------------------------------------------------

X3602(#1) Are any of the IRA or Keogh accounts yours?

X3612(#2) Does your (wife/partner) have IRA or Keogh accounts?

X3622(#3) Do any other family members have IRA or Keogh accounts?

1. \*YES

5. \*NO (or: no spouse or partner in PEU: X107^=1/no other

PEU members: (X113, X125, X131, X137, X207, X213,

X219, X225)^=1)

0. Inap. (No IRA/Keogh accounts: X3601^=1)

X3603(#1) How many IRA and Keogh accounts do you (personally) have?

X3613(#2) How many IRA and Keogh accounts does your (wife/partner) have?

X3623(#3) Including any rollovers from past job pensions, how many

IRA and Keogh accounts do your other family members have?

Code number of accounts

0. Inap. (No IRA/Keogh accounts: X3601^=1; no IRA/Keoghs:

X3601^=1/no spouse or partner in PEU: X107^=1/no other

PEU members: X113^=1; person has no account: X3602^=1/

X3612^=1/X3622^=1)

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FOR THE PUBLIC DATA SET, TOP-CODED AT 5

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Is this account a Roth IRA, an account [you/your

(wife/partner)/(your other family members)] rolled over

from a pension into an IRA, some other type of IRA, or a

Keogh?

CODE ALL THAT APPLY.

Are these accounts Roth IRAs, accounts [you/your

(wife/partner)/(your other family members)] rolled over

from pensions into IRAs, some other types of IRAs, or

Keoghs?

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN

X6444(#1) \*ROTH IRA

X6448(#2)

X6452(#3)

X6446(#1) \*ROLL-OVER FROM PENSION ACCOUNT

X6450(#2)

X6454(#3)

X6447(#1) \*REGULAR OR OTHER IRA

X6451(#2)

X6455(#3)

X3605(#1) \*KEOGH

X3615(#2)

X3625(#3)

1. Checked

5. Not checked

0. Inap. (No IRA/Keogh accounts: X3601^=1; no IRA/Keoghs:

X3601^=1/no spouse or partner in PEU: X107^=1/no other

PEU members: X113^=1; person has no account: X3602^=1/

X3612^=1/X3622^=1)

X6551(#1) How much is in your Roth IRA account(s)?

X6559(#2) How much is in your (wife's/partner's) Roth IRA account(s)?

X6567(#3) How much is in your other family members' Roth

IRA account(s)?

Code amount

0. Inap. (No IRA/Keogh accounts: X3601^=1; no IRA/Keoghs:

X3601^=1/no spouse or partner in PEU: X107^=1/no other

PEU members: X113^=1; person has no account: X3602^=1/

X3612^=1/X3622^=1; no accounts of this type: X6444^=1/

X6448^=1/X6452^=1)

X6552(#1) How much is in your roll-over IRA account(s)?

X6560(#2) How much is in your (husband/wife/partner)'s

X6568(#3) roll-over IRA account(s)?

How much is in your other family members'

roll-over IRA account(s)?

Code amount

0. Inap. (No IRA/Keogh accounts: X3601^=1; no IRA/Keoghs:

X3601^=1/no spouse or partner in PEU: X107^=1/no other

PEU members: X113^=1; person has no account: X3602^=1/

X3612^=1/X3622^=1; no accounts of this type: X6446^=1/

X6450^=1/X6454^=1)

X6553(#1) How much is in your regular or other IRA account(s)?

X6561(#2) How much is in your (husband/wife/partner)'s

X6569(#3) other IRA account(s)?

How much is in your other family members' other

IRA account(s)?

Code amount

0. Inap. (No IRA/Keogh accounts: X3601^=1; no IRA/Keoghs:

X3601^=1/no spouse or partner in PEU: X107^=1/no other

PEU members: X113^=1; person has no account: X3602^=1/

X3612^=1/X3622^=1; no accounts of this type: X6447^=1/

X6451^=1/X6455^=1)

X6554(#1) How much is in your Keogh account(s)?

X6562(#2) How much is in your (husband/wife/partner)'s Keogh

X6570(#3) account(s)?

How much is in your other family members' Keogh

account(s)?

Code amount

0. Inap. (No IRA/Keogh accounts: X3601^=1; no IRA/Keoghs:

X3601^=1/no spouse or partner in PEU: X107^=1/no other

PEU members: X113^=1; person has no account: X3602^=1/

X3612^=1/X3622^=1; no accounts of this type: X3605^=1/

X3615^=1/X3625^=1)

If R reported that R/SP/OFM had an IRA (X3602=1/X3612=1/X3622=1) , but

answered DK/REF to type, the CAPI program asked the balance in all of

the accounts. As in the cases where R broke off before completing a

grid, this total amount was used as a constraint in the imputation of

the individual components.

X6756(#1) How much is in (your/your [husband's/wife's/partner's/

X6757(#2) other family member's]) account(s)?

X6758(#3)

Code amount

0. Inap. (No IRA/Keogh accounts: X3601^=1; no IRA/Keoghs:

X3601^=1/no spouse or partner in PEU: X107^=1/no other

PEU members: X113^=1; person has no account: X3602^=1/

X3612^=1/X3622^=1; no accounts of this type: X6447^=1/

X6451^=1/X6455^=1; type of accounts not answered

DK/REF: X6444^=(.D, .R)/X6448^=(.D, .R)/X6452^=(.D, .R))

GF

X6555(#1) How is the money in (this/these) account(s) invested? Is

X6563(#2) it all in stocks, all in interest-earning assets, is it

X6571(#3) split between these, or something else?

IF R SAY "MUTUAL FUND," PROBE FOR WHETHER IT IS A STOCK

FUND, A BOND FUND, OR ONE SPLIT OVER BOTH TYPES

1. \*ALL IN STOCKS

2. \*ALL IN INTEREST EARNING ASSETS/BONDS

3. \*SPLIT

4. Real estate

5. Hedge fund

6. Annuities

8. Mineral rights

-7. \*OTHER

0. Inap. (No IRA/Keogh accounts: X3601^=1; no IRA/Keoghs:

X3601^=1/no spouse or partner in PEU: X107^=1/no other

PEU members: X113^=1; person has no account: X3602^=1/

X3612^=1/X3622^=1)

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FOR THE PUBLIC DATA SET, CODES 4, 5, 6, 7 AND 8 ARE

COMBINED WITH CODE -7

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6556(#1) About what percent is in stocks?

X6564(#2)

X6572(#3) Code percent \* 100

0. Inap. (No IRA/Keogh accounts: X3601^=1; no IRA/Keoghs:

X3601^=1/no spouse or partner in PEU: X107^=1/no other

PEU members: X113^=1; person has no account: X3602^=1/

X3612^=1/X3622^=1; holdings not split:

X6555^=3/X6563^=3/X6571^=3)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, ROUNDED TO NEAREST 500 IF

BETWEEN 250 AND 9750 INCLUSIVE, OTHERWISE IF > 0

ROUNDED TO NEAREST 100 WITH A TOP-CODE AT 9900

AND A BOTTOM-CODE AT 100 FOR THOSE VALUES ROUNDED

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X6557(#1) Did you take any withdrawals from (this/these) account(s)

X6565(#2) in 2003?

X6573(#3) Did your (husband/wife/partner) make any withdrawals from

(this/these) account(s) in 2003?

Did your other family members make any withdrawals from

(this/these) account(s) in 2003?

1. \*YES

5. \*NO

0. Inap. (No IRA/Keogh accounts: X3601^=1; no IRA/Keoghs:

X3601^=1/no spouse or partner in PEU: X107^=1/no other

PEU members: X113^=1; person has no account: X3602^=1/

X3612^=1/X3622^=1)

X6558(#1) How much in total did you withdraw in 2003?

X6566(#2) How much in total did (he/she) withdraw in 2003?

X6574(#3) How much in total did they withdraw in 2003?

Code amount

0. Inap. (No IRA/Keogh accounts: X3601^=1; no IRA/Keoghs:

X3601^=1/no spouse or partner in PEU: X107^=1/no other

PEU members: X113^=1; person has no account: X3602^=1/

X3612^=1/X3622^=1; no withdrawals: X6557^=1/X6565^=1/

X6573^=1)

(#1): X3606 X3607 X3608 X3609 X7501 X6721

(#2): X3616 X3617 X3618 X3619 X7502 X6722

(#3): X3626 X3627 X3628 X3629 X7503

Please look at the list of institutions you wrote down.

(Is this/Are they) with any of the institutions on the

list, or from someplace else?

IF INSTITUTIONS LIST: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

ASK R TO UPDATE LIST IF A NEW INSTITUTION IS MENTIONED AT

THIS POINT./IF "SOMEPLACE ELSE": What type of institution

is that?)

Please look at the Institutions Card. (Is this/Are they)

(Is this/ Are these) with any of the institutions on

the Institutions Card, or from someplace else?

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

CHECK INSTITUTION CARD AND UPDATE IF A NEW INSTITUTION IS

MENTIONED AT THIS POINT./ IF "SOMEPLACE ELSE": What type of

institution is that?)

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN

1. \*Institution 1

2. \*Institution 2

3. \*Institution 3

4. \*Institution 4

5. \*Institution 5

6. \*Institution 6

7. \*Institution 7

-7. \*OTHER (Coded using the MASTER INSTITUTION LIST)

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (No IRA/Keogh accounts: X3601^=1; no IRA/Keoghs:

X3601^=1/no spouse or partner in PEU: X107^=1/no other

PEU members: X113^=1; person has no account: X3602^=1/

X3612^=1/X3622^=1; at least one institution field must

be filled out, but higher order fields may be inap.)

The following codes show on the screen after at

least seven distinct institutions have been during

the course of the interview:

11. \*COMMERCIAL BANK; trust company

12. \*S&L/SAV BANK

13. \*CREDIT UNION

16. \*BROKERAGE

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

(#1): X9119 X9120 X9121 X9122 X9209 X9223

(#2): X9123 X9124 X9125 X9126 X9210 X9224

(#3): X9127 X9128 X9129 X9130 X9211

Recode: type of institution

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (No IRA/Keogh accounts: X3601^=1; no IRA/Keoghs:

X3601^=1/no spouse or partner in PEU: X107^=1/no other

PEU members: X113^=1; person has no account: X3602^=1/

X3612^=1/X3622^=1; at least one institution field must

be filled out, but higher order fields may be inap.)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

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GF

X7077(#1) (Is this account/ Are these accounts) covered by federal

X7078(#2) deposit insurance?

X7079(#3)

DEPOSIT INSURANCE IS PROVIDED BY THE FDIC (FEDERAL DEPOSIT

INSURANCE CORPORATION) AND NCUSIF (NATIONAL CREDIT UNION

SHARE INSURANCE FUND). IF THE INSTITUTION GOES BANKRUPT,

DEPOSIT INSURANCE WOULD PAY UP TO $100,000 OF AN ACCOUNT

BALANCE.

1. \*YES

5. \*NO

0. Inap. (No IRA/Keogh accounts: X3601^=1; no IRA/Keoghs:

X3601^=1/no spouse or partner in PEU: X107^=1/no other

PEU members: X113^=1; person has no account: X3602^=1/

X3612^=1/X3622^=1)

-----------------------------------------------------------------------------

CERTIFICATES OF DEPOSIT

-----------------------------------------------------------------------------

X3719 Do you have any CDs or certificates of deposit at financial

institutions?

Do you or anyone in your family here have any CDs or certificates

of deposit at financial institutions?

IF YES: Please do not include CDs that are part of IRAs or

Keoghs I have already recorded.

IF R ASKS: CDs are certificates held for a set period of

time that must be cashed or renewed at the maturity date.

INCLUDE "BANKERS ACCEPTANCES" AND "REPURCHASE AGREEMENTS".

DO NOT INCLUDE ACCOUNTS HELD FOR PEOPLE NOT IN THE FAMILY LIVING HERE.

1. \*YES

5. \*NO

X3720 Altogether, how many such CDs do you have?

Altogether, how many such CDs do you and your family living

here have?

Code number

0. Inap. (no certificates of deposit: X3719^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 20

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X3721 What is the total dollar value of all these CDs?

What is the total dollar value of this CD?

Code amount

0. Inap. (no certificates of deposit: X3719^=1)

X3722 X3723 X3724 X3725 X7618 X6654 X6655

Please look at the list of institutions you wrote down.

(Is this/Are these) CD(s) with any of the institutions

on the list, or from someplace else?

IF INSTITUTIONS LIST: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

ASK R TO UPDATE LIST IF A NEW INSTITUTION IS MENTIONED AT

THIS POINT./IF "SOMEPLACE ELSE": What type of institution

is that?)

Please look at the Institutions Card. (Is this/Are these)

(Is this/ Are these) CD(s) with any of the institutions on

the Institutions Card, or from someplace

else?

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

CHECK INSTITUTION CARD AND UPDATE IF A NEW INSTITUTION IS

MENTIONED AT THIS POINT./ IF "SOMEPLACE ELSE": What type of

institution is that?)

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN

1. \*Institution 1

2. \*Institution 2

3. \*Institution 3

4. \*Institution 4

5. \*Institution 5

6. \*Institution 6

7. \*Institution 7

-7. \*OTHER (Coded using the MASTER INSTITUTION LIST)

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (no certificates of deposit: X3719^=1; if there

are any CDs, the first field must be non-zero, but

higher-order fields may be inap.)

The following codes show on the screen after at

least seven distinct institutions have been during

the course of the interview:

11. \*COMMERCIAL BANK; trust company

12. \*S&L/SAV BANK

13. \*CREDIT UNION

16. \*BROKERAGE

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X9134 X9135 X9136 X9137 X9214 X9217 X9218

Recode: type of institution

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (no certificates of deposit: X3719^=1; if there

are any CDs, the first field must be non-zero, but

higher order fields may be inap.)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X3726 How many different institutions do you use for all these CDs?

Code number

0. Inap. (no certificates of deposit: X3719^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 10

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7620 Is this CD held jointly, or is it in your name, in your

husband's name, or something else?

Is this CD held jointly, or is it in your name, in your

wife's name, or something else?

Is this CD held jointly, or is it in your name, in your

partner's name, or something else?

Is this CD in your name or something else?

Is this CD held jointly, or is it in your name?

Is most of the money in these CDs held jointly, or is most

of it in your name, in your husband's name, or something else?

Is most of the money in these CDs held jointly, or is most

of it in your name, in your wife's name, or something else?

Is most of the money in these CDs held jointly, or is most

of it in your name, in your partner's name, or something else?

Is most of the money in these CDs in your name or something else?

Is most of the money in these CDs held jointly, or is most

of it in your name?

1. \*Joint account; with spouse/partner

2. \*R's account

3. \*Spouse's/partner's account

4. Other family member's account

5. Child only

6. Child and respondent or spouse

8. Other relative with respondent or spouse

9. Unrelated person, n.f.s.

10. Unrelated person with respondent or spouse

11. Equal amounts in R and spouse/partner names

50. Trust account

51. Personal business account

-7. \*Other

0. Inap. (no certificates of deposit: X3719^=1; R lives

alone: X7001=1)

-----------------------------------------------------------------------------

SAVINGS/MONEY MARKET ACCOUNTS

-----------------------------------------------------------------------------

X3727 Do you have any savings or money market accounts? These

could be traditional savings accounts, Coverdell or 529

education accounts, Christmas Club accounts, or any type

of savings or money market account I have not already

recorded.

Do you or anyone in your family living here have any

savings or money market accounts? These could be

traditional savings accounts, Coverdell or 529 education

accounts, Christmas Club accounts, or any type of savings

or money market account I have not already recorded.

PROBE: Please do not include flexible spending accounts or

accounts that are part of pension plan.

A MONEY MARKET ACCOUNT HAS AN INTEREST RATE THAT VARIES

FROM MONTH TO MONTH, AND IT USUALLY HAS LIMITED CHECKING

PRIVILEGES.

COVERDELL ACCOUNTS AND STATE-SPONSORED "529" ACCOUNTS ARE

EDUCATIONAL SAVINGS PLANS (ESAs).

DO NOT INCLUDE CUSTODIAL ACCOUNTS HELD FOR PEOPLE NOT IN

THE FAMILY LIVING HERE. INCLUDE ALL ACCOUNTS IN WHICH THE

FAMILY HAS ANY ASSET INTEREST.

1. \*YES

5. \*NO

X3728 How many such accounts do you have?

How many such accounts do you and your family living here

have?

DO NOT INCLUDE ACCOUNTS HELD FOR PEOPLE NOT IN THE FAMILY

LIVING HERE.

Code number of accounts

0. Inap. (no savings accoutnsL X3727^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 10

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X6755 Originally reported value of X3728 (see introduction)

Code number of accounts

0. Inap. (no savings accounts: X3727^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 10

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-----------------------------------------------------------------------------

#1 refers to the first savings account

#2 refers to the second savings account

#3 refers to the third savings account

#4 refers to the fourth savings account

#5 refers to the fifth savings account

#6 refers to the sixth savings account

#7 refers to the remaining savings accounts

-----------------------------------------------------------------------------

X3729(#1) Please look at the list of institutions you wrote down. [Is

X3735(#2) (this account/the largest account)/Thinking about the next

X3741(#3) largest savings account, is it] with any of the institutions

X3747(#4) on the list, or from someplace else?

X3753(#5)

X3759(#6) IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

ASK R TO UPDATE LIST IF A NEW INSTITUTION IS MENTIONED

AT THIS POINT./IF "SOMEPLACE ELSE":What type of institution

is that?)

Please look at the Institutions Card. [Is (this

account/the largest account)/Thinking about the next

largest savings account, is it] with any of the institutions

on the list, or from someplace else?

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

CHECK INSTITUTION CARD AND UPDATE IF A NEW INSTITUTION

IS MENTIONED AT THIS POINT./IF "SOMEPLACE ELSE":What type

of institution is that?)

1. \*Institution 1

2. \*Institution 2

3. \*Institution 3

4. \*Institution 4

5. \*Institution 5

6. \*Institution 6

7. \*Institution 7

-7. \*OTHER (Coded using the MASTER INSTITUTION LIST)

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (no savings accounts: X3727^=1/fewer than 2

accounts: X3728<2/fewer than 3 account: X3728<3/fewer

than 4 accounts: X3728<4/fewer than 5 accounts:

X3728<5/fewer than 6 accounts)

The following codes show on the screen after at

least seven distinct institutions have been during

the course of the interview:

11. \*COMMERCIAL BANK; trust company

12. \*S&L/SAV BANK

13. \*CREDIT UNION

16. \*BROKERAGE

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X9259(#1) Recode: type of institution

X9260(#2)

X9261(#3) See MASTER INSTITIUTION LIST for other codes (See X308)

X9262(#4) 0. Inap. (no savings accounts: X3727^=1/fewer than 2

X9263(#5) accounts: X3728<2/fewer than 3 account: X3728<3/fewer

X9264(#6) than 4 accounts: X3728<4/fewer than 5 accounts: X3728<5

X3728<5/fewer than 6 accounts)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X3730(#1) How much is in this account?

X3736(#2)

X3742(#3) Code amount

X3748(#4) -1. Nothing

X3754(#5) 0. Inap. (no savings accounts: X3727^=1/fewer than 2

X3760(#6) accounts: X3728<2/fewer than 3 account: X3728<3/fewer

than 4 accounts: X3728<4/fewer than 5 accounts: X3728<5

X3728<5/fewer than 6 accounts)

GF

X3731(#1) Is this a joint account, or is the account in your

X3737(#2) name, in your husband's name, or something else?

X3743(#3)

X3749(#4) Is this a joint account, or is the account in your

X3755(#5) name, in your wife's name, or something else?

X3761(#6)

Is this a joint account, or is the account in your

name, in your partner's name, or something else?

Is this account in your name or something else?

Is this a joint savings account, or is the account in your

name?

1. \*Joint account; with spouse/partner

2. \*R's account

3. \*Spouse's/partner's account

4. Other family member's account

5. Child only

6. Child and respondent or spouse

8. Other relative with respondent or spouse

9. Unrelated person, n.f.s.

10. Unrelated person with respondent or spouse

50. Trust account

51. Personal business account

-7. \*Other

0. Inap. (no savings accounts: X3727^=1/fewer than 2

accounts: X3728<2/fewer than 3 account: X3728<3/fewer

than 4 accounts: X3728<4/fewer than 5 accounts: X3728<5

X3728<5/fewer than 6 accounts)

GF

X3732(#1) What type of account is this? (Is it a traditional savings

X3738(#2) account, a Coverdell or 529 educational account, a money market

X3744(#3) account, or some other type of account?)

X3750(#4)

X3756(#5) PASSBOOK AND STATEMENT ACCOUNTS ARE TRADITIONAL SAVINGS ACCOUNTS.

X3762(#6) COVERDELL ACCOUNTS AND STATE-SPONSORED "529" ACCOUNTS ARE

EDUCATIONAL SAVINGS PLANS (ESAs)

DO NOT INCLUDE EMPLOYER-SPONSORED FLEXIBLE SPENDING PLANS.

1. \*TRADITIONAL SAVINGS ACCOUNT; "passbook account";

"statement account"

2. \*COVERDELL/EDUCATION IRA

3. \*529/STATE-SPONSORED EDUCATION ACCOUNT

4. \*MONEY MARKET ACCOUNT

5. Christmas club account; other account for designated saving

purpose (e.g., vacation)

6. Share account

12. Floating interest rate accounts (other than those coded 5)

14. Informal group saving arrangement

15. Medical savings account

20. Foreign account type

30. Sweep account n.e.c.; cash management account

-7. \*OTHER

0. Inap. (no savings accounts: X3727^=1/fewer than 2

accounts: X3728<2/fewer than 3 account: X3728<3/fewer

than 4 accounts: X3728<4/fewer than 5 accounts: X3728<5

X3728<5/fewer than 6 accounts)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODES 14 AND 20 ARE COMBINED

WITH CODE 1; CODES 3 AND 15 ARE COMBINED WITH CODE 2;

CODE 30 IS COMBINED WITH CODE 12

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

GF

X7080(#1) How is the money in this account invested? Is it all

X7082(#2) in stocks, all in interest-earning assets, is it split

X7084(#3) between these, or something else?

X7086(#4)

X7088(#5)

X7090(#6)

IF R SAY "MUTUAL FUND," PROBE FOR WHETHER IT IS A STOCK

FUND, A BOND FUND, OR ONE SPLIT OVER BOTH TYPES

1. \*ALL IN STOCKS

2. \*ALL IN INTEREST EARNING ASSETS/BONDS

3. \*SPLIT

4. Real estate

5. Hedge fund

6. Annuities

8. Mineral rights

-7. \*OTHER

0. Inap. (no savings accounts: X3727^=1/fewer than 2

accounts: X3728<2/fewer than 3 account: X3728<3/fewer

than 4 accounts: X3728<4/fewer than 5 accounts: X3728<5

X3728<5/fewer than 6 accounts; not a Coverdell or

529 education account: X3732^=2 or 3/X3738^=2 or 3/

X3744^= 2 or 3/X3750^= 2 or 3/X3756^= 2 or 3/

X3762^= 2 or 3)

GF

X7081(#1) About what percent is in stocks?

X7083(#2)

X7085(#3) Code percent \* 100

X7087(#4)

X7089(#5) 0. Inap. (no savings accounts: X3727^=1/fewer than 2

X7091(#6) accounts: X3728<2/fewer than 3 account: X3728<3/fewer

than 4 accounts: X3728<4/fewer than 5 accounts: X3728<5

X3728<5/fewer than 6 accounts; not a Coverdell or

529 education account: X3732^=2 or 3/X3738^=2 or 3/

X3744^= 2 or 3/X3750^= 2 or 3/X3756^= 2 or 3/

X3762^= 2 or 3; holdings not split: X7080^=3/X7082^=3/

X7084^=3/X7086^=3/X7088^=3/X7090^=3)

X3733(#1) Does this account have check-writing privileges?

X3739(#2)

X3745(#3) 1. \*YES

X3751(#4) 5. \*NO

X3757(#5) 0. Inap. (no savings accounts: X3727^=1/fewer than 2

X3763(#6) accounts: X3728<2/fewer than 3 account: X3728<3/fewer

than 4 accounts: X3728<4/fewer than 5 accounts: X3728<5

X3728<5/fewer than 6 accounts; not a money market or

OTHER account: X3732^=4 or -7/X3738^=4 or -7/X3744

^=4 or -7/X3750^=4 or -7/X3756^=4 or -7/X3762^=4 or -7))

GF

X7085(#1) Is this account covered by federal deposit insurance?

X7086(#2)

X7087(#3) DEPOSIT INSURANCE IS PROVIDED BY THE FDIC (FEDERAL DEPOSIT

X7088(#4) INSURANCE CORPORATION) AND NCUSIF (NATIONAL CREDIT UNION

X7089(#5) SHARE INSURANCE FUND). IF THE INSTITUTION GOES BANKRUPT,

X7090(#6) DEPOSIT INSURANCE WOULD PAY UP TO $100,000 OF AN ACCOUNT

BALANCE.

1. \*YES

5. \*NO

0. Inap. (no savings accounts: X3727^=1/fewer than 2

accounts: X3728<2/fewer than 3 account: X3728<3/fewer

than 4 accounts: X3728<4/fewer than 5 accounts: X3728<5

X3728<5/fewer than 6 accounts)

X3765(#7) How much is in all your remaining savings accounts? (What

was the average over the last month?)

How much is in all your family's remaining savings

accounts? (What was the average over the last month?)

Code amount

-1. Nothing

0. Inap. (no savings accounts: X3727^=1; fewer than 7

accounts: X3728<7)

X8473(#7) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (no savings accounts: X3727^=1; did not

break off early in grid)

-----------------------------------------------------------------------------

MUTUAL FUNDS

-----------------------------------------------------------------------------

GF

X3819 Do you (or anyone in your family living here) have any

mutual funds or hedge funds?

IF YES: Please do not include any pension or 401(k) accounts,

or assets you have already told me about.

INCLUDE OPEN-END AND CLOSED-END FUNDS, UNIT TRUSTS, EQUITY

TRUSTS, LOAD AND NO-LOAD FUNDS, COMMODITY POOLS, REITs

(REAL ESTATE INVESTMENT TRUSTS), MORTGAGE TRUSTS, AND

ALL OTHER TYPES OF MUTUAL FUNDS.

1. \*YES

5. \*NO

GF

X3821 I need to know what types of funds you have. Do you

have. . .

stock mutual funds?

(IF R ASKS, STOCK FUNDS INCLUDE DOMESTIC STOCK FUNDS,

GROWTH FUNDS, INDEX FUNDS, GLOBAL STOCK FUNDS, SECTOR

FUNDS, AND ANY OTHER TYPE OF FUND PRIMARILY INVESTED

IN STOCK.)

1. \*YES

5. \*NO

0. Inap. (no mutual funds: X3819^=1)

X3822 What is the total market value of all of the stock mutual

funds that you have?

What is the total market value of all of the stock mutual

funds that you and your family living here have?

Code amount

0. Inap. (no mutual funds: X3819^=1; no stock funds: X3821^=1)

X3823 Do you have. . .

tax-free bond funds?

THESE FUNDS INCLUDE MUNICIPAL BONDS ("MUNIs") AND

OTHER TAX-EXEMPT BONDS

1. \*YES

5. \*NO

0. Inap. (no mutual funds: X3819^=1)

X3824 What is the total market value of all of the tax-free bond

mutual funds that you have?

What is the total market value of all of the tax-free bond

mutual funds that you and your family living here have?

Code amount

0. Inap. (no mutual funds: X3819^=1; no tax-free bond

funds: X3823^=1)

X3825 Do you have. . .

government or government backed bond mutual funds?

THESE FUNDS INCLUDE U.S. TREASURY BILLS AND BONDS AND OTHER

U.S. GOVERNMENT-SPONSORED BONDS.

1. \*YES

5. \*NO

0. Inap. (no mutual funds: X3819^=1)

X3826 What is the total market value of all of the government or

government backed bond mutual funds that you have?

What is the total market value of all of the government or

government backed bond mutual funds that you and your family

living here have?

Code amount

0. Inap. (no mutual funds: X3819^=1; no government or

government backed bond funds: X3825^=1)

X3827 Do you have. . .

other bond mutual funds?

THESE FUNDS INCLUDE COPORATE BONDS, COMMERCIAL PAPER, JUNK

BONDS, AND ALL REMAINING TYPES OF BONDS

1. \*YES

5. \*NO

0. Inap. (no mutual funds: X3819^=1)

X3828 What is the total market value of all of the other bond

mutual funds that you have?

What is the total market value of all of the other bond

mutual funds that you and your family living here have?

Code amount

0. Inap. (no mutual funds: X3819^=1; no other bond

funds: X3827^=1)

X3829 Do you have. . .

combination funds?

COMBINATION FUNDS ("BALANCED FUNDS") HOLD BOTH STOCK

AND BONDS; ALSO INCLUDE REITs, AND MISC. TYPES OF FUNDS

1. \*YES

5. \*NO

0. Inap. (no mutual funds: X3819^=1)

X3830 What is the total market value of all of the combination

funds that you have?

What is the total market value of all of the combination

funds that you and your family living here have?

Code amount

0. Inap. (no mutual funds: X3819^=1; no combination

mutual funds: X3829^=1)

GF

X7785 Do you have. . .

any other mutual funds or hedge funds?

1. \*YES

5. \*NO

0. Inap. (no mutual funds: X3819^=1)

X7787 What is the total market value of all of these other

funds that you have?

What is the total market value of all of these other

funds that you and your family living here have?

Code amount

0. Inap. (no mutual funds: X3819^=1; no other types of

mutual funds: X7785^=1)

NOTE: X7787 consists almost entirely of hedge funds and

a small amount of exchange traded funds (ETF).

If the R reported having a mutual fund (X3819=1) , but answered NO to

having all types (X3821=5, X3823=5, X3825=5, X3827=5, X3829=5 and

X7785=5), the the CAPI program asked what type of fund the R had and

requested the total amount in mutual funds; based on the information

provided, these funds were reclassified. As in the cases where R

broke off before completing a grid, this total amount was used as a

constraint in the imputation of the individual components.

(What kinds of funds are these? PLEASE SPECIFY.)

X6704 What is the total market value of all of the mutual funds

that you have?

What is the total market value of all of the mutual funds

that you and your family living here have?

Code amount

0. Inap. (no mutual funds: X3819^=1; R answered YES to at

least one type of ownership question)

X3820 In how many different mutual funds do you own shares?

In how many different mutual funds does your family own

shares?

(INTERVIEWER: WE WANT THE NUMBER OF FUNDS, NOT THE NUMBER

OF FUND MANAGEMENT COMPANIES.)

Code number of plans

0. Inap. (no mutual funds: X3819^=1)

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FOR THE PUBLIC DATA SET, TOP-CODED AT 25

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6799 X6800 X6801 X6802 X6803 X6850 X6851 X6852

Please look at the list of institutions you wrote down.

(Is this/Are these) mutual fund(s) with any of the

institutions on the list, or from someplace else?

IF INSTITUTIONS LIST: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

ASK R TO UPDATE LIST IF A NEW INSTITUTION IS MENTIONED AT

THIS POINT./IF "SOMEPLACE ELSE": What type of institution

is that?)

Please look at the Institutions Card.

(Is this/ Are these) mutual fund(s) with any of the

institutions on the Institutions Card, or from someplace

else?

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

CHECK INSTITUTION CARD AND UPDATE IF A NEW INSTITUTION IS

MENTIONED AT THIS POINT./ IF "SOMEPLACE ELSE": What type of

institution is that?)

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN

1. \*Institution 1

2. \*Institution 2

3. \*Institution 3

4. \*Institution 4

5. \*Institution 5

6. \*Institution 6

7. \*Institution 7

-7. \*OTHER (Coded using the MASTER INSTITUTION LIST)

SEE MASTER INSTITUTION LIST

0. Inap. (no mutual funds: X3819^=1; if there are any

mutual funds, the first field must be non-zero, but

higher-order fields may be inap.)

The following codes show on the screen after at

least seven distinct institutions have been during

the course of the interview:

11. \*COMMERCIAL BANK; trust company

12. \*S&L/SAV BANK

14. \*FINANCE/LOAN CO

16. \*BROKERAGE

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X9225 X9226 X9227 X9228 X9229 X9230 X9231 X9232

Recode: type of institution

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (no mutual funds: Xxxxx=5; if there are any

mutual funds, the first field must be non-zero, but

higher-order fields may be inap.)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X3831 Overall has there been a gain or loss in the value of all

these mutual fund shares since you obtained them?

Overall has there been a gain or loss in the value of all

these mutual fund shares since you or someone in your

family here obtained them?

1. \*Gain

3. \*Neither gain nor loss

5. \*Loss

0. Inap. (no mutual funds: X3819^=1)

How much have they gained in value since they were obtained?

X3832 Code percent gain \* 100

-2. Virtually all

0. Inap. (no mutual funds: X3819^=1; no gain: X3831^=1)

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FOR THE PUBLIC DATA SET, ROUNDED TO NEAREST 100

WITH A BOTTOM-CODE AT 100. FOR VALUES ABOVE 10000,

ROUNDING TO 2 SIGNIFICANT DIGITS

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X3833 Code amount

-2. Virtually all

0. Inap. (no mutual funds: X3819^=1; no gain: X3831^=1)

How much have they lost in value since they were obtained?

X3834 Code percent \* 100

-2. Virtually all

0. Inap. (no mutual funds: X3819^=1; no loss: X3831^=5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, ROUNDED TO NEAREST 100

WITH A BOTTOM-CODE AT 100

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X3835 Code amount

-2. Virtually all

0. Inap. (no mutual funds: X3819^=1; no loss: X3831^=5)

-----------------------------------------------------------------------------

SAVINGS BONDS

-----------------------------------------------------------------------------

X3901 Do you have any U.S. government savings bonds?

Do you or anyone in your family here have any

U.S. government savings bonds?

OLDER SAVINGS BONDS MAY BE SERIES E AND H.

MORE RECENT SAVINGS BONDS INCLUDE SERIES EE, HH, AND I.

ONE WAY SAVINGS BONDS CAN BE PURCHASED IS BY PAYROLL DEDUCTION.

1. \*YES

5. \*NO

X3902 What is the total face value of all the savings bonds that you

have?

and your family have?

Code amount

0. Inap. (no savings bonds: X3901^=1)

-----------------------------------------------------------------------------

BONDS OTHER THAN SAVINGS BONDS

-----------------------------------------------------------------------------

GF

X3903 Do you (or anyone here) have any other corporate,

municipal, government, or other type of bonds or bills?

IF YES: Please do not include bonds or bills held in

pension accounts, or any other accounts I have already recorded.

1. \*YES

5. \*NO

X3905 I need to know what types of bonds or bills you have. Do

you have. . .

mortgage-backed bonds such as those from "Ginnie-Mae",

"Fannie-Mae" or "Freddie-Mac"?

1. \*YES

5. \*NO

0. Inap. (no bonds: X3903^=1)

X3906 What is the face value of all of the mortgage-backed bonds

that you have?

What is the face value of all of the mortgage-backed bonds

that you and your family living here have?

Code amount

0. Inap. (no bonds: X3903^=1; no mortgage backed bonds:

X3905^=1)

X7635 What is the total market value?

Code amount

0. Inap. (no bonds: X3903^=1; no mortgage backed bonds:

X3905^=1)

X3907 Do you have. . .

U.S. Government bonds or Treasury bills?

INCLUDE U.S. GOVERNMENT BILLS AND BONDS AS WELL AS ALL

U.S. GOVERNMENT AGENCY BONDS

1. \*YES

5. \*NO

0. Inap. (no bonds: X3903^=1)

X3908 What is the face value of all of the U.S. Government bonds

or Treasury bills that you have?

What is the face value of all of the U.S. Government bonds

or Treasury bills that you and your family living here have?

Code amount

0. Inap. (no bonds: X3903^=1; no govenment bonds or bills:

X3907^=1)

X7636 What is the total market value?

Code amount

0. Inap. (no bonds: X3903^=1; no govenment bonds or bills:

X3907^=1)

X3909 Do you have. . .

state or municipal bonds, or other taxfree bonds?

ALSO INCLUDE "REVENUE BONDS," "INDUSTRIAL DEVELOPMENT

BONDS," AND OTHER BONDS ISSUED BY STATE AND LOAN

GOVERNMENTS

1. \*YES

5. \*NO

0. Inap. (no bonds: X3903^=1)

X3910 What is the face value of all of the state or municipal

bonds, or other taxfree bonds that you have?

What is the face value of all of the state or municipal

bonds, or other taxfree bonds that you and your family

living here have?

Code amount

0. Inap. (no bonds: X3903^=1; no taxfree bonds: X3909^=1)

X7637 What is the total market value?

Code amount

0. Inap. (no bonds: X3903^=1; no taxfree bonds: X3909^=1)

X7631 Do you have. . .

foreign bonds?

INCLUDE BONDS ISSUED BY FOREIGN GOVERNMENTS OR COMPANIES

1. \*YES

5. \*NO

0. Inap. (no bonds: X3903^=1)

X7633 What is the face value of all of the foreign bonds

that you have?

What is the face value of all of the foreign bonds

that you and your family living here have?

Code amount

0. Inap. (no bonds: X3903^=1; no foreign bonds: X7631^=1)

X7638 What is the total market value?

Code amount

0. Inap. (no bonds: X3903^=1; no foreign bonds: X7631^=1)

X7632 Do you have. . .

corporate or any other type of bonds?

INCLUDE CORPORATE BONDS, COMMERCIAL PAPER, JUNK

BONDS, AND MISC. BONDS NOT ALREADY MENTIONED

1. \*YES

5. \*NO

0. Inap. (no bonds: X3903^=1)

X7634 What is the face value of all of the corporate or any other

type of bonds that you have?

What is the face value of all of the corporate or any other

type of bonds that you and your family living here have?

Code amount

0. Inap. (no bonds: X3903^=1; no corporate bonds: X7632^=1)

X7639 What is the total market value?

Code amount

0. Inap. (no bonds: X3903^=1; no corporate bonds: X7632^=1)

If the R reported having some type of bonds (X3903=1) , but answered NO

to having all types (X3905=5, X3907=5, X3909=5, X7631=5, and X7632=5),

the the CAPI program asked what type of bond the R had and requested

the total face and market value of all bonds; based on the

information provided, these bonds were reclassified. As in the cases

where R broke off before completing a grid, this total amount was used

as a constraint in the imputation of the individual components.

(PLEASE EXPLAIN TYPE OF BONDS.)

X6705 What is the face value of all of the bonds that you have?

What is the face value of all of the bonds that you and your

family living here have?

Code amount

0. Inap. (no bonds: X3903^=1; R answered YES to at

least one type of ownership question)

If the R reported having some type of bonds (X3903=1) , but answered NO

to having all types (X3905=5, X3907=5, X3909=5, X7631=5, and X7632=5),

the the CAPI program asked what type of bond the R had and requested

the total face and market value of all bonds; based on the

information provided, these bonds were reclassified. As in the cases

where R broke off before completing a grid, this total amount was used

as a constraint in the imputation of the individual components.

X6706 What is the total market value?

Code amount

0. Inap. (no bonds: X3903^=1; R answered YES to at

least one type of ownership question)

X3904 How many different bonds or bills do you own?

How many different bonds or bills do you or your family own?

Code number

0. Inap. (no bonds: X3903^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 150

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

-----------------------------------------------------------------------------

PUBLICLY TRADED STOCK

-----------------------------------------------------------------------------

GF

X3913 Do you (or anyone in your family living here) own any stock

which is publicly traded?

IF YES: Please do not include stock held through pension

accounts, or assets that I have already recorded.

1. \*YES

5. \*NO

X3914 In how many different companies do you own stock?

In how many different companies do you or your family

living here own stock?

WE WANT THE NUMBER OF COMPANIES IN WHICH R OWNS STOCK, NOT

THE NUMBER OF INDIVIDUAL SHARES.

Code number

0. Inap. (no stocks: X3913^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 150

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X3915 What is the total market value of this stock?

IF R BOUGHT THE STOCK "ON MARGIN" (BORROWED ON THE STOCK

TO BUY IT), WE WANT THE GROSS VALUE OF THE STOCK.

Code amount

0. Inap. (no stocks: X3913^=1)

X3921 Of your publicly-traded stock, is any of it stock in a

company where you work or have worked?

Of your family's publicly-traded stock, is any of it stock

in a company where you or anyone in your family living here

work or have worked?

DO NOT INCLUDE BUSINESSES REPORTED EARLIER.

DO NOT INCLUDE STOCK HELD THROUGH A RETIREMENT ACCOUNT AT

WORK.

1. \*YES

5. \*NO

0. Inap. (no stocks: X3913^=1)

X7191 Did you include this stock in the value of your total

holdings that you just told me?

1. \*YES

3. NO initially, but fixed in editing YES

0. Inap. (no stocks: X3913^=1; no stock in company where

work: X3921^=1)

X3922 What is the total market value of your stock in the company?

Code amount

0. Inap. (no stocks: X3913^=1; no stock in company where

work: X3921^=1)

X7640 Of your stock, is any of it stock in a company

headquartered outside of the United States?

Of your family's stock, is any of it stock in a company

headquartered outside of the United States?

1. \*YES

4. Yes, but included with company stock

5. \*NO

0. Inap. (no stocks: X3913^=1)

X7192 Did you include this stock in the value of your total

holdings that you told me?

1. \*YES

3. NO initially, but fixed in editing YES

0. Inap. (no stocks: X3913^=1; no foreign stock: X7640^=1)

X7641 What is the total market value in dollars of this stock?

Code amount

0. Inap. (no stocks: X3913^=1; no foreign stock: X7640^=1)

X3916 Overall has there been a gain or loss in the value of this

stock since you obtained it?

Overall has there been a gain or loss in the value of all

of your family's stock since you or someone in your family

here obtained it?

1. \*Gain

3. \*Neither gain nor loss

5. \*Loss

0. Inap. (no stocks: X3913^=1)

How much has it gained in value since it was obtained?

X3917 Code percent \* 100

-2. Virtually all

0. Inap. (no stocks: X3913^=1; no gain: X3916^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, ROUNDED TO NEAREST 100

WITH A BOTTOM-CODE AT 100. FOR VALUES ABOVE 10000,

ROUNDING TO 2 SIGNIFICANT DIGITS

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X3918 Code amount

-2. Virtually all

0. Inap. (no stocks: X3913^=1; no gain: X3916^=1)

How much has it lost in value since it was obtained?

X3919 Code percent \* 100

-2. Virtually all

0. Inap. (no stocks: X3913^=1; no loss: X3916^=5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, ROUNDED TO NEAREST 100

WITH A BOTTOM-CODE AT 100

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X3920 Code amount

-2. Virtually all

0. Inap. (no stocks: X3913^=1; no loss: X3916^=5)

-----------------------------------------------------------------------------

BROKERAGE ACCOUNTS

-----------------------------------------------------------------------------

X3923 Do you have a brokerage account for the purchase or sale of

stocks and other securities?

Do you or anyone in your family here have a brokerage

account for the purchase or sale of stocks and other securities?

1. \*YES

5. \*NO

X3924 X3925 X3926 X3927 X7642 X6668 X6669

Please look at the list of institutions you wrote down.

(Is this/Are these) account(s) with any of the institutions

on the Institutions Card, or from someplace else?

IF INSTITUTIONS LIST: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

ASK R TO UPDATE LIST IF A NEW INSTITUTION IS MENTIONED AT

THIS POINT./IF "SOMEPLACE ELSE": What type of institution

is that?)

Please look at the Institutions Card. (Is this/Are these)

account(s) with any of the institutions on the Institutions

Card, or from someplace else?

IF INSTITUTIONS CARD: Which institution?

(IF "SOMEPLACE ELSE": What institution is that?

CHECK INSTITUTION CARD AND UPDATE IF A NEW INSTITUTION IS

MENTIONED AT THIS POINT./ IF "SOMEPLACE ELSE": What type of

institution is that?)

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN

1. \*Institution 1

2. \*Institution 2

3. \*Institution 3

4. \*Institution 4

5. \*Institution 5

6. \*Institution 6

7. \*Institution 7

-7. \*OTHER (Coded using the MASTER INSTITUTION LIST)

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (no brokerage account: X3923^=1)

The following codes show on the screen after at

least seven distinct institutions have been during

the course of the interview:

11. \*COMMERCIAL BANK; trust company

12. \*S&L/SAV BANK

13. \*CREDIT UNION

16. \*BROKERAGE

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X9143 X9144 X9145 X9146 X9212 X9219 X9220

Recode: type of institution

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (no brokerage account: X3923^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

Over the past year, about how many times did you buy or

sell stocks or other securities through a broker?

Over the past year, about how many times did you or anyone

in your family living here buy or sell stocks or other

securities through a broker?

ENTER ZERO FOR NONE.

X3928 Code number

-1. None

0. Inap. (no brokerage account: X3923^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 300

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7193 INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

Code frequency

1. \*DAY

2. \*WEEK

3. Every two weeks

4. \*MONTH

5. \*QUARTER

6. \*YEAR

8. In total

11. Twice per year; every six months

12. Every two months

18. Hour

22. Varies

25. Over 2 years

31. \*Twice a month

-1. None

-7. \*OTHER

0. Inap. (no brokerage account: X3923^=1)

X3929 Not including any accounts you've told me about, do you

have a "cash" or "call money" account at a stock brokerage?

Not including any accounts you've told me about, do you or

anyone in your family living here have a "cash" or "call

money" account at a stock brokerage?

(IF R ASKS: CASH OR CALL MONEY ACCOUNTS HOLD MONEY RECEIVED

FROM THE SALE OF STOCK UNTIL THE MONEY IS REINVESTED.)

1. \*YES

5. \*NO

0. Inap. (no brokerage account: X3923^=1)

X3930 What is the total dollar value of all the cash or call

money accounts

that you have?

that you and your family living here have?

Code amount

-1. Nothing

0. Inap. (no brokerage account: X3923^=1; no call

account: X3929^=1)

X3931 Do you (or anyone in your family living here) currently

have any margin loans at a stock brokerage?

IF YES, SAY: Please do not include any loans I have already

recorded.

1. \*YES

5. \*NO

0. Inap. (no brokerage account: X3923^=1)

X3932 Altogether, what is the current balance on these margin loans?

Code amount

0. Inap. (no brokerage account: X3923^=1; no margin loan:

X3931^=1)

-----------------------------------------------------------------------------

ANNUITIES, TRUSTS, AND MANAGED INVESTMENT ACCOUNTS

-----------------------------------------------------------------------------

GF

X6815 IN PERSON VERSION:

(SHOW CARD 10)

Do you (or anyone in your family here)

receive income from or have assets in an annuity? Please do

not include job pensions.

TELEPHONE VERSION:

Do you (or anyone in your family here)

receive income from or have assets in an annuity? Please do

not include job pensions.

1. \*YES

5. \*NO

X6575 Did you (or your family living here) purchase these

annuities using or rolling over a lump-sum distribution

of settlement from a past job pension?

1. \*YES

5. \*NO

0. Inap. (No annuities: X6815=5)

X6576 Could you (or your family living here) cash in any of these

annuities if you wanted to? That is, do you have an

equity interest in any of the annuities?

WE DO NOT CARE IF THERE IS A PENALTY FOR CASHING IN THE ANNUITY.

1. \*YES

5. \*NO

0. Inap. (No annuities: X6815=5)

X6577 How much would you receive if you cashed in these annuities?

Code amount

0. Inap. (No annuities: X6815=5; no annuities that could

be cashed in: X6576=5)

X6578 How much income did you (or your family living here)

receive in 2003 from these annuities you could cash in?

Code amount

-1. None

0. Inap. (No annuities: X6815=5; no annuities that could

be cashed in: X6576=5)

X6579 Do you (or your family living here) also have annuities

which you could not cash in?

1. \*YES

5. \*NO

0. Inap. (No annuities: X6815=5; no annuities that could

be cashed in: X6576=5)

X6580 IF X6576=5 THEN ASK: How much income did you (or your

family living here) receive in 2003 from all the annuities?

OTHERWISE ASK: How much income did you (or your family

living here) receive in 2003 from the annuities you could

not cash in?

Code amount

-1. None

0. Inap. (No annuities: X6815=5; no annuities that could

be not cashed in: X6579=5)

X8480 Orignally reported value for annuity income in the case

where the respondent did not provide a value for the type

of annuity (X6576). In imputation, the value here is

assigned to X6578 or X6580, or the amount is split between

these two variables.

Code amount

-1. None

0. Inap. (No annuities: X6815=5; non-missing value at X6576)

X6821 X6822 X6823 X6824 X6825

Who manages the annuities--is it any of the institutions

from the list that you wrote down, or are they managed by

someone else?

IF INSTITUTIONS LIST: Which institution(s)?

(IF "SOMEPLACE ELSE": What institution is that?

ASK R TO UPDATE LIST IF A NEW INSTITUTION IS MENTIONED AT

THIS POINT./ IF "SOMEPLACE ELSE": What type of institution

is that?)

Who manages the annuities--is it any of the institutions

on the Institutions Card, or are they managed by someone

else?

IF INSTITUTIONS CARD: Which institution(s)?

(IF "SOMEPLACE ELSE": What institution is that?

CHECK INSTITUTION CARD AND UPDATE IF A NEW INSTITUTION IS

MENTIONED AT THIS POINT./

IF "SOMEPLACE ELSE": What type of institution is that?)

INCLUDE ALL ACCOUNTS REGARDLESS OF WHETHER THEY CAN BE CASHED IN.

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN

1. \*Institution 1

2. \*Institution 2

3. \*Institution 3

4. \*Institution 4

5. \*Institution 5

6. \*Institution 6

7. \*Institution 7

-7. \*OTHER (Coded using the MASTER INSTITUTION LIST)

SEE MASTER INSTITIUTION LIST

0. Inap. (no annuities: X6815=5; if there are any annuities,

the first field must be non-zero, but higher-order fields

may be inap.)

The following codes show on the screen after at

least seven distinct institutions have been during

the course of the interview:

11. \*COMMERCIAL BANK; trust company

12. \*S&L/SAV BANK

13. \*CREDIT UNION

16. \*BROKERAGE

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X9236 X9237 X9238 X9239 X9240

Recode: type of institution

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (no annuities: X6815=5; if there are any annuities,

the first field must be non-zero, but higher-order fields

may be inap.)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

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GF

X6581 How is the money in these annuities invested? Is all of it

in stocks, all of it in interest-earning assets, is it

split between these, or something else?

IF R SAY "MUTUAL FUND," PROBE FOR WHETHER IT IS A STOCK

FUND, A BOND FUND, OR ONE SPLIT OVER BOTH TYPES

1. \*ALL IN STOCKS

2. \*ALL IN INTEREST EARNING ASSETS/BONDS

3. \*SPLIT

4. Real estate

5. Hedge fund

6. Annuities

8. Mineral rights

9. \*EIC/INCOME CONTRACT GUARANTEED

-7. \*OTHER

0. Inap. (No annuities: X6815=5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODES 4, 5, 6, 7 AND 8 ARE

COMBINED WITH CODE -7

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6582 About what percent is in stocks?

Code percent \* 100

0. Inap. (No annuities: X6815=5; holdings not SPLIT:

X6581^=3)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, ROUNDED TO NEAREST 500 IF

BETWEEN 250 AND 9750 INCLUSIVE, OTHERWISE IF > 0

ROUNDED TO NEAREST 100 WITH A TOP-CODE AT 9900

AND A BOTTOM-CODE AT 100 FOR THOSE VALUES ROUNDED

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

GF

X6827 Do you (or anyone in your family here) have income from or

have assets in a trust or managed investment account?

DO NOT INCLUDE FUNDS IN IRREVOCABLE TRUSTS WHERE R HAS

RIGHTS TO NEITHER INCOME NOR ANY OF THE ASSETS. BUT DO

INCLUDE CHARITABLE REMAINDER TRUSTS WHERE R HAS LIFETIME

INCOME RIGHTS

1. \*YES

5. \*NO

Are these trusts or managed investment accounts?

(CODE ALL THAT APPLY)

X6828 Legal \*Trusts

X6829 \*Managed investment accounts

X6830 \*Other

1. Checked

5. Not checked

10. Charitable remainder trust: does not include

donor-advised funds where R has surrendered all benefit

from the asset (X6830 only)

0. Inap. (no trusts or MIAs: X6827=5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODE 10 IS COMBINED WITH "YES"

RESPONSES FOR X6828

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6583 Does this include any assets you told me about earlier?

1. \*YES

5. \*NO

0. Inap. (No trusts/MIAs: X6827=5)

X6584 Which ones?

X6595

X6596

X6597

X6598

X6599

X6900

X6901

X6902

X6903

X6904

X6905

1. Principal residence

2. Investment/vacation properties

3. Businesses

4. Checking accounts

5. IRAs/Keoghs

6. CDs

7. Money market/savings accounts

8. Mutual funds

9. Bonds

10. Stocks

11. Annuities

12. Brokerage accounts

13. Managed investment accounts

14. Vehicles/Other vehicles

15. Insurance

16. Other assets recorded at X4019 etc.

-7. \*OTHER

0. Inap. (No trusts/MIAs: X6827=5; no assets in account

reported earlier: X6583=5)

X6585 Besides those, do you (or your family living here) have any

other assets in a trust or managed investment account?

1. \*YES

5. \*NO

0. Inap. (No trusts/MIAs: X6827=5; not included in assets

earlier: X6583=5)

X6586 Could you (or your family living here) cash in any of these

accounts if you wanted to? That is, do you have an

equity interest in any of them?

WE DO NOT CARE IF THERE IS A PENALTY FOR CASHING IN THE ACCOUNT.

1. \*YES

5. \*NO

0. Inap. (No trusts/MIAs: X6827=5; no other trusts/MIAs:

X6585=5)

X6587 How much would you receive if you cashed in these accounts?

Code amount

0. Inap. (No trusts/MIAs: X6827=5; no other trusts/MIAs:

X6585=5; no trusts/MIAs that could be cashed in: X6586=5)

X6588 How much income did you (or your family living here)

receive in 2003 from these accounts you could cash in?

Code amount

-1. None

0. Inap. (No trusts/MIAs: X6827=5; no other trusts/MIAs:

X6585=5; no trusts/MIAs that could be cashed in: X6586=5)

X6589 Do you (or your family living here) also have such accounts

which you could not cash in?

1. \*YES

5. \*NO

0. Inap. (No trusts/MIAs: X6827=5; no other trusts/MIAs:

X6585=5; no trusts/MIAs that could be cashed in: X6586=5)

X6590 IF X6586=5 THEN ASK: How much income did you (or your family

living here) receive in 2003 from all these accounts?

OTHERWISE ASK: How much income did you (or your family living

here) receive in 2003 from the accounts you could not cash

in?

Code amount

-1. None

0. Inap. (No trusts/MIAs: X6827=5; no other trusts/MIAs:

X6585=5; no trusts/MIAs that could not be cashed in:

X6589=5)

X8490 Orignally reported value for trust/MIA income in the case

where the respondent did not provide a value for the type

of trust/MIA (X6586). In imputation, the value here is

assigned to X6588 or X6590, or the amount is split between

these two variables.

Code amount

-1. None

0. Inap. (No trusts/MIAs: X6815=5; non-missing value at X6586)

X6836 X6837 X6838 X6839 X6840 X6853

Who manages the accounts--is it any of the institutions

from the list that you wrote down, or are they managed by

someone else?

IF INSTITUTIONS LIST: Which institution(s)?

(IF "SOMEPLACE ELSE": What institution is that?

ASK R TO UPDATE LIST IF A NEW INSTITUTION IS MENTIONED AT

THIS POINT./ IF "SOMEPLACE ELSE": What type of institution

is that?)

Who manages the accounts--is it any of the institutions

on the Institutions Card, or are they managed by someone

else?

IF INSTITUTIONS CARD: Which institution(s)?

IF "SOMEPLACE ELSE": What institution is that?

CHECK INSTITUTION CARD AND UPDATE IF A NEW INSTITUTION IS

MENTIONED AT THIS POINT.

INCLUDE ALL ACCOUNTS REGARDLESS OF WHETHER THEY CAN BE CASHED IN.

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN

1. \*Institution 1

2. \*Institution 2

3. \*Institution 3

4. \*Institution 4

5. \*Institution 5

6. \*Institution 6

7. \*Institution 7

-7. \*OTHER (Coded using the MASTER INSTITUTION LIST)

SEE MASTER INSTITIUTION LIST

0. Inap. (no trusts or MIAs: X6827=5; no other trusts/MIAs:

X6585=5; if there are any trusts or MIAs, the first

field must be non-zero, but higher-order fields may be

inap.)

The following codes show on the screen after at

least seven distinct institutions have been during

the course of the interview:

11. \*COMMERCIAL BANK; trust company

12. \*S&L/SAV BANK

13. \*CREDIT UNION

16. \*BROKERAGE

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X9247 X9248 X9249 X9250 X9251 X9252

Recode: type of institution

See MASTER INSTITIUTION LIST for other codes (See X308)

0. Inap. (no trusts or MIAs: X6827=5; no other trusts/MIAs:

X6585=5; if there are any trusts or MIAs, the first

field must be non-zero, but higher-order fields may be

inap.)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER INSTITUTION LIST FOR INFORMATION ON CODE

COLLAPSING FOR INSTITUTION VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

GF

X6591 How is the money in these accounts invested? Is all of it

in stocks, all of it in interest-earning assets, is it

split between these, or something else?

IF R SAY "MUTUAL FUND," PROBE FOR WHETHER IT IS A STOCK

FUND, A BOND FUND, OR ONE SPLIT OVER BOTH TYPES

1. \*ALL IN STOCKS

2. \*ALL IN INTEREST EARNING ASSETS/BONDS

3. \*SPLIT

4. Real estate

5. Hedge fund

6. Annuities

8. Mineral rights

-7. \*OTHER

0. Inap. (No trusts/MIAs: X6827=5; no other trusts/MIAs:

X6585=5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODES 4, 5, 6, 7 AND 8 ARE

COMBINED WITH CODE -7

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6592 About what percent is in stocks?

Code percent \* 100

0. Inap. (No trusts/MIAs:

X6585=5; holdings not SPLIT: X6591^=3)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, ROUNDED TO NEAREST 500 IF

BETWEEN 250 AND 9750 INCLUSIVE, OTHERWISE IF > 0

ROUNDED TO NEAREST 100 WITH A TOP-CODE AT 9900

AND A BOTTOM-CODE AT 100 FOR THOSE VALUES ROUNDED

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

-----------------------------------------------------------------------------

LIFE INSURANCE

-----------------------------------------------------------------------------

X4001 Do you have any life insurance? Please include individual

and group policies, but not accident insurance.

Do you or anyone in your family living here have any life

insurance? Please include individual and group policies,

but not accident insurance.

DO NOT INCLUDE INSURANCE THAT ONLY PAYS IN SPECIAL CIRCUMSTANCES (FOR

EXAMPLE, ACCIDENT LIFE INSURANCE).

1. \*YES

5. \*NO

X4002 The two major types of life insurance are term and

cash-value policies. Term policies pay a benefit if the

insured person dies, but otherwise have no value. They are

often provided through an employer or union, but may also

be bought by individuals. Cash-value policies also pay a

death benefit, but differ in that they build up a value as

premiums are paid. Other names for types of cash value

policies are "whole life" and "universal life."

Are any of your policies individual term insurance?

Are any of your family's policies individual term insurance?

1. \*YES

5. \*NO

0. Inap. (no life insurance: X4001^=1)

X4003 What is the current face value of all the term life

policies that you have?

What is the current face value of all the term life

policies that you and your family living here have?

(THE FACE VALUE OF A POLICY IS WHAT THE POLICY WOULD PAY IN

THE EVENT OF DEATH)

Code amount

0. Inap. (no life insurance: X4001^=1; no term insurance:

X4002^=1)

X4004 Do you have any policies that build up a cash value or that

you can borrow on? These are sometimes called "whole

life", "straight life", or "universal life" policies.

DO NOT INCLUDE ANY INSURANCE ANNUITIES ALREADY RECORDED.

Do you have any policies that build up a cash value or that

you can borrow on?

IF R ASKS: D These are sometimes called "whole life",

"straight life", or "universal life" policies.

1. \*YES

5. \*NO

0. Inap. (no life insurance: X4001^=1)

X4005 What is the current face value of all of the policies that

build up a cash value?

(THE FACE VALUE OF A POLICY IS WHAT THE POLICY WOULD PAY IN

THE EVENT OF DEATH.)

Code amount

0. Inap. (no life insurance: X4001^=1; no cash value

insurance: X4004^=1)

X4006 If you cancelled these policies now, how much would you

receive from the insurance company for the payments you

have made up to now? That is, what is the current "cash

value" of the policies? What is the total cash value of

these policies?

Code amount

-1. Nothing

0. Inap. (no life insurance: X4001^=1; no cash value

insurance: X4004^=1)

X4007 Are you borrowing against these policies?

Are you or your family borrowing against these policies?

1. \*YES

5. \*NO

0. Inap. (no life insurance: X4001^=1; no cash value

insurance: X4004^=1)

X4008 Is the cash value you just gave me the net cash value, that

is the total cash value minus the loan, or is it the gross

cash value?

1. \*Net

2. \*Gross

3. Originally reported \*net, but edited gross

0. Inap. (no life insurance: X4001^=1; no cash value

insurance: X4004^=1; not borrowing on policy:

X4007^=1; cash value=0: X4006=-1)

X4009 Did I record these loans earlier in the interview?

3. \*YES, identified as loan reported earlier

4. \*YES, but no apparent match in the data

5. \*NO

0. Inap. (no life insurance: X4001^=1; no cash value

insurance: X4004^=1; not borrowing on policy:

X4007^=1; cash value=0: X4006=-1)

X7645 Where did you tell me about these loans?

1. \*Credit card or store debt

2. \*Mortgage debt

3. \*Home equity loan

4. \*Other home purchase loan

5. \*Home improvement loan

6. \*Loan for other real estate

7. \*Line of credit

8. \*Business loan

9. \*Vehicle loan

10. \*Education Loan

11. \*Other installment loan

12. \*Margin loan

13. \*Insurance loan

14. \*Pension loan

25. Other installment loan #1

26. Other installment loan #2

27. Other installment loan #3

28. Other installment loan #4

29. Other installment loan #5

30. Other installment loan #6

-7. \*Other

0. Inap. (no life insurance: X4001^=1; no cash value

insurance: X4004^=1; not borrowing on policy:

X4007^=1; cash value=0: X4006=-1; loan not reported

earlier: X4009^=1)

NOTE: The loan types above marked with an asterisk only

appeared on an interviewer's screen when the respondent had

previously reported having those types of loans.

X8175 Recode: Link code for loan mentioned earlier

1. X415

2. X416

3. X717

4. X418

5. X7500

6. X6648

7. X6649

8. X6720

9. X817

10. X917

11. X1017

12. X1046

13. X1112

14. X1123

15. X1134

16. X1217

17. X1728

18. X1828

19. X1928

20. X2220

21. X2320

22. X2420

23. X7171

24. X2521

25. X2621

26. X7823

27. X7846

28. X7869

29. X7923

30. X7946

31. X7969

32. X2725

33. X2742

34. X2825

35. X2842

36. X2925

37. X2942

38. X3122

39. X3222

40. X3322

0. Inap. (no life insurance: X4001^=1; no cash value

insurance: X4004^=1; not borrowing on policy:

X4007^=1; cash value=0: X4006=-1; loan not reported

earlier: X4009^=1)

X4010 How much is currently borrowed?

Code amount

0. Inap. (no life insurance: X4001^=1; no cash value

insurance: X4004^=1; not borrowing on policy:

X4007^=1; cash value=0: X4006=-1)

X4011 Typically how much are the payments on these loans?

Code amount

-1. Nothing

-2. No typical payment

0. Inap. (no life insurance: X4001^=1; no cash value

insurance: X4004^=1; not borrowing on policy:

X4007^=1; cash value=0: X4006=-1)

X4012 INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often is that amount paid?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. Lump sum; one payment only

11. \*Twice per year

12. Every two months

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (no life insurance: X4001^=1; no cash value

insurance: X4004^=1; not borrowing on policy:

X4007^=1; cash value=0: X4006=-1)

X4013 What is the current annual rate of interest being charged on

these loans?

Code percent \* 100

-1. Nothing

0. Inap. (no life insurance: X4001^=1; no cash value

insurance: X4004^=1; not borrowing on policy:

X4007^=1; cash value=0: X4006=-1)

X4014 How much are the premiums for these policies that build up

a cash value?

Code amount

-1. Nothing

-2. No typical payment

0. Inap. (no life insurance: X4001^=1; no cash value

insurance: X4004^=1)

X4015 INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

(And how often is that amount paid?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. Lump sum; one payment only; in total

11. Twice per year

12. Every two months

21. Policy paid up

31. \*Twice a month

-1. Nothing

-2. No typical payment

-7. \*Other

0. Inap. (no life insurance: X4001^=1; no cash value

insurance: X4004^=1)

If R reported having life insurance (X4001=1), but reports no term

insurance (X4002=5) and no whole life insurance (X4004=5), then the

CAPI program asked R the total face value of all types of life

insurance. R might also have reported having term insurance, DK

whether other insurance is whole life but still know the face value or

the remaining insurance. If an amount was provided, it was used as a

constraint on the imputation of the sum of the face value of term and

cash value life insurance.

X4016 Other than this term insurance, what is the current face

value of all the life insurance you own?

What is the current face value of all the life insurance

you own?

Other than this term insurance, what is the current face

value of all the life insurance you and your family living

here own?

What is the current face value of all the life insurance

you and your family living here own?

Code amount

0. Inap. (no life insurance: X4001^=1; whole life

insurance: X4004=1; term insurance and not DK

existence of whole life insurance: X4002=1 and

J4004^=2050)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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-----------------------------------------------------------------------------

MISCELLANEOUS ASSETS AND DEBTS

-----------------------------------------------------------------------------

X4017 We have talked about various types of savings, investments,

and loans. Other than what I have already recorded, are

you owed any money by friends, relatives, businesses, or

others?

We have talked about various types of savings, investments,

and loans. Other than what I have already recorded, are

you or anyone in your family living here owed any money by

friends, relatives who are not listed on the card,

businesses, or others?

(WE DO NOT WANT TO INCLUDE LOANS BETWEEN FINANCIALLY

DEPENDENT FAMILY MEMBERS.)

1. \*YES

5. \*NO

X4018 Altogether, how much are you owed?

Code amount

0. (R not owed money: X4017^=1)

X4019 Other than pension assets and other such retirement assets,

do you have any other substantial assets that I haven't

already recorded -- for example, artwork, precious metals,

antiques, oil and gas leases, futures contracts, future

proceeds from a lawsuit or estate that is being settled,

royalties, or something else?

Other than pension assets and other such retirement assets,

do you or anyone in your family living here have any other

substantial assets that I haven't already recorded -- for

example, artwork, precious metals, antiques, oil and gas

leases, futures contracts, future proceeds from a lawsuit

or estate that is being settled, royalties, or something

else?

(DO NOT INCLUDE PENSION-TYPE OR EMPLOYER PROFIT- SHARING

ACCOUNTS HERE.)

1. \*YES

5. \*NO

-----------------------------------------------------------------------------

#1 refers to the first misc. asset

#2 refers to the second misc. asset

#3 refers to the third misc. asset

-----------------------------------------------------------------------------

X4020(#1) About the most valuable of these ..

X4024(#2) What kind of asset is it?

X4028(#3)

INTERVIEWER: GROUP ONLY SIMILAR ITEMS, STARTING WITH THE

MOST VALUABLE GROUP.

1. Gold

2. Silver (incl. silverware)

3. Other metals or metals NA type

10. Jewelry; gem stones (incl. antique)

11. Cars (antique or classic)

12. Antiques; furniture

13. Art objects; paintings, sculpture, textile art,

ceramic art, photographs

14. (Rare) books

15. Coin collections

16. Stamp collections

17. Guns

18. Misc. real estate (except cemetery)

19. Cemetery plots

20. China; figurines; crystal/glassware

21. Musical instruments

22. Livestock; horses; crops

23. Oriental rugs

24. Furs

25. Other collections, incl. baseball cards, records, wine

61. Loans to friends/relatives

62. Other loans/debts owed to R

63. Cash, n.e.c.

64. Future proceeds from a lawsuit (includes expected

settlement from a divorce)

65. Future proceeds from an estate

66. Deferred compensation

67. Insurance Settlement

68. Other deferred income (other than 66)

71. Oil/gas/mineral leases or investments

72. Futures contracts, stock options

73. Royalties; patents

74. Non-publicly traded stock, n.e.c.; stock with

restricted trading rights, n.e.c.

75. Computer

76. Equipment/tools, n.e.c.

77. Future lottery/prize receipts

78. Association, club, or exchange membership

79. Other obligations to R

80. Child support owed to R

81. Remaining payment from sale of an asset; other cash

due from dissolution of business

82. PayPal or other online cash acccount; include online

gambling accounts

83. Tax credit

-7. Other

0. Inap. (no misc. assets: X4019^=1; no further misc.

assets)

NOTE: This question is intended to catch any

significant assets that the respondent might have

omitted earlier, in addition to the items

specifically mentioned in the question text. In many

cases, the data originally reported here may be more

appropriate in another part of the questionnaire. In

such cases, the data are moved and the fact that

information was moved is indicated by the value of the

shadow variable (J-code) of the data in the new

location.

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODES 14, 15, 16, 17, 20,

23, AND 25 ARE COMBINED WITH CODE 12; CODE 61 IS

COMBINED WITH CODE 62; CODE 68 IS COMBINED WITH CODE

66; CODE 72 IS COMBINED WITH CODE 71; CODE 82 IS

COMBINED WITH CODE 63; CODE 78 IS COMBINED WITH CODE

74; CODES 64, 65, 67, 77, 79, 80 AND 83 ARE COMBINED

WITH CODE -7

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X4022(#1) What is the total dollar value that you have in

X4026(#2) this asset?

X4030(#3)

What is the total dollar value that you and your family

living here have in this asset?

Code amount

0. Inap. (no misc. assets: X4019^=1/no second asset:

X4023^=1/no third asset: X4027^=1)

X4023(#2) Do you have any other such substantial assets?

X4027(#3)

1. \*YES

5. \*NO

0. Inap. (no misc. assets: X4019^=1/no third asset:

X4027^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X4031 Do you owe any other money not recorded earlier?

Do you or anyone in your family living here owe any other

money not recorded earlier?

WE DO NOT WANT TO INCLUDE LOANS BETWEEN FINANCIALLY

DEPENDENT FAMILY MEMBERS.

DO NOT INCLUDE LOANS AGAINST PENSION ACCOUNTS BELONGING TO

R OR SPOUSE.

1. \*YES

5. \*NO

X4032 How much is owed?

Code amount

0. Inap. (no misc. debts: X4031^=1)

-----------------------------------------------------------------------------

ACCOUNTS IN FOREIGN CURRENCY

-----------------------------------------------------------------------------

X7647 Thinking about all the accounts we have talked about, are

any of the accounts you have told me about held in some

currency other than U.S. dollars?

1. \*YES

5. \*NO

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

CURRENT MAIN JOB OF HEAD AND SPOUSE/PARTNER

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

#1 refers to current job information for head

#2 refers to current job information for spouse/partner

-----------------------------------------------------------------------------

X7196(#1) THE FOLLOWING QUESTIONS ARE ASKING ABOUT THE (RESPONDENT'S/

X7263(#2) [SPOUSE/PARTNER'S]) EMPLOYMENT

INTERVIEWER: IF SPOUSE/PARTNER IS PRESENT, TRY TO OBTAIN

EMPLOYMENT INFORMATION FROM (HIM/HER) DIRECTLY.

INTERVIEWER: WHO IS PROVIDING EMPLOYMENT INFORMATION

ABOUT THE (RESPONDENT/[RESPONDENT'S SPOUSE/PARTNER]?)

1. \*DESIGNATED RESPONDENT

2. \*SPOUSE/PARTNER

3. Case was a breakoff/data missing because of iwer/CAPI error

0. Inap. (/no spouse)

GF

(#1) X6670 X6671 X6672 X6673 X6674 X6675 X6676 X6677

(#2) X6678 X6679 X6680 X6681 X6682 X6683 X6684 X6685

IN PERSON VERSION:

(SHOW CARD 11))

We are interested in your (wife's/partner's) present

job status. (Are you/Is [he/she]) working now,

temporarily laid off, unemployed and looking for work,

on sick leave, disabled and unable to work, retired,

a student, a homemaker, or what?

TELEPHONE VERSION:

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN

CODE "OTHER" ONLY IF AN APPROPRIATE CODE IS NOT AVAILABLE!

1. \*WORKING NOW/SELF-EMPLOYED; job accepted and waiting

to start work

2. \*TEMPORARILY LAID OFF; seasonal work and not working

now; leave of absense other than code 8

3. \*UNEMPLOYED AND LOOKING FOR WORK

4. \*STUDENT; job training

5. \*HOMEMAKER; never worked

6. \*DISABLED

7. \*RETIRED (FULL, PARTIAL, OR TEMPORARY); includes misc.

out of the labor force, n.e.c

8. \*ON SICK LEAVE OR MATERNITY LEAVE

10. \*VOLUNTEER WORK

11. \*ON VACATION/OTHER LEAVE OF ABSENCE

13. On sabbatical/extended leave and expecting to go back

to job

15. \*ON STRIKE

-7. \*Other

0. Inap. (no further instances; for R at least the first

field must be filled out/no spouse or no further

instances beyond the first field)

NOTE: CARD 11 contains the following text in a vertical

column: "Working now or on strike," "Temporarily laid off;

on sick leave or other type of leave," "Unemployed and

looking for work," "Student," "Homemaker," "Disabled,"

"Retired," "Other."

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODES 11, 13 AND 15 ARE

COMBINED WITH CODE 1

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X4101(#1) (Do you/Does [he/she]) expect to go back to this job?

X4701(#2)

1. \*YES

5. \*NO

0. Inap. (not laid off, on sick leave or on strike:

X6670-X6677^=(2, 8, 15)/X6678-X6685^=(2, 8, 15);/no spouse)

X4102(#1) When did (you/[he/she]) last work on this job?

X4702(#2)

Code month

1. \*January

2. \*February

3. \*March

4. \*April

5. \*May

6. \*June

7. \*July

8. \*August

9. \*September

10. \*October

11. \*November

12. \*December

0. Inap. (not laid off or on sick leave:

X6670-X6677^=2 or 8/X6678-X6685^=2 or 8;

not expecting to go back to this job:

X4101/X4701^=1;/no spouse)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X4103(#1) Code year (4 digits)

X4703(#2) 0. Inap. (not laid off or on sick leave:

X6670-X6677^=2 or 8/X6678-X6685^=2 or 8;

not expecting to go back to this job:

X4101/X4701^=1;/no spouse)

When did (you/your wife/partner) become disabled?

When did (you/your wife/partner) retire?

X4104(#1) Code year (4 digits)

X4704(#2) 0. Inap. (not retired or disabled: X6670-X6677^=6 or 7/

X6678-X6685^=6 or 7;/no spouse)

X7197(#1) Code age

X7264(#2) -1. Disabled since birth

0. Inap. (not retired or disabled: X6670-X6677^=6 or 7/

X6678-X6685^=6 or 7;/no spouse)

X7198(#1) Code number of years past

X7265(#2) -1. 2004

0. Inap. (not retired or disabled: X6670-X6677^=6 or 7/

X6678-X6685^=6 or 7;/no spouse)

X6780(#1) At any time during the past twelve months, were you

X6784(#2) unemployed and looking for work?

At any time during the past twelve months, was

(he/she) unemployed and looking for work?

1. \*YES

5. \*NO

0. Inap. (currently unemployed and looking for work:

X6670-X6677=3/X6678-X6685=3;/no spouse)

X6781(#1) Over this period, how many weeks in total (were you/was

X6785(#2) [he/she]) unemployed and looking for work?

Over the past 12 months, how many weeks in total (were you/

was[he/she]) unemployed and looking for work?

Code number of weeks

0. Inap. (not currently unemployed and looking for work

and not unemployed and looking for work in past 12

months: X6670-X6677=^3 and X6780^=1/X6678-X6685=^3 and

X6784^=1;/no spouse)

X4105(#1) (Are you/Is [he/she]) doing any work for pay at the present

X4705(#2) time?

1. \*YES

5. \*NO

0. Inap. (any work status working or laid off but not

expecting to go back: X6670-X6677=1 or X6670-X6677=2

and X4101=5/X6678-X6685=1 or X6678-X6685=2 and

X4701=5;/no spouse)

X4100(#1) Recode: current work status

X4700(#2)

11. Worker only

12. Worker + disabled

13. Worker + retired

14. Worker + student

15. Worker + homemaker

16. Worker + unemployed/looking for work

17. Worker + temporarily laid off

20. Temporarily laid off, expecting to return to work

21. Temporarily laid off, not expecting to return to

job and no current work

22. On sick/maternity leave and expecting to return to

work (also including disabled)

23. On sick/maternity leave, but not expecting to return to work

24. On sabbatical and expecting to go back to work

30. Unemployed and looking for work (also including

homemaker, student, disabled)

50. Retired, retired + disabled, retired + unemployed,

retired + homemaker, retired + student

52. Disabled (also including student, homemaker, and

laid off but not expecting to return to work)

70. Student (also including homemaker)

80. Homemaker/other not in labor force only

85. Unpaid volunteer

90. Unpaid family workers: R's who volunteer that they

work in a family business or farm and are unpaid.

(Do not include here "volunteer work" for charitable

or non-profit organizations.)

96. Other combination incl. WORKER beside 11, 12, 13,

14, 15 ,16, 17

97. Other (incl. combination) not including WORKER

199. Absent spouse not included in IW

0. Inap. (/no spouse)

X4106(#1) Next are some questions about your (wife's/partner's)

X4706(#2) current, main job. (Do you/Does [he/she]) work for someone

else, (are you/is [he/she]) self-employed, or what?

IF R SAYS ("I RUN MY OWN/SPOUSE RUNS OWN) BUSINESS",

CODE AS SELF-EMPLOYED

1. \*Someone else

2. \*Self-employed; other closely held business owned by PEU;

consultant

3. \*PARTNERSHIP; law firm; medical/dental partnership;

other non-publicly-traded business in which R/S/P has

an interest

-7. \*Other

0. Inap. (not working or expecting to go back to work:

X6670-X6677^=1 or X4101=5 or X4105=5/X6678-X6685^=1 or

X4701=5 or X4705=5;/no spouse)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODE 3 IS COMBINED WITH

CODE 2

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

GF

X7092(#1) Earlier you said you did not have a business. Does your

X7095(#2) share of the place where (you/[your husband/wife/partner])

(are self-employed/work in a partnership) have any net

value? How much?

CODE NOTHING AS ZERO

IF VALUE NE 0 ASK: WHAT SHARE DO YOU OWN?

Code amount

-1. Nothing

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not self-employed: X4106^=2 or 3/

X4706^=2 or 3; no businesses: X3103^=1; no actively

managed businesses: X3104^=1; working at all owned

businesses: X3113^=5 and X3213^=5 and X3313^=5/X3114^=5

and X3214^=5 and X3314^=5; R lives alone: X7001)

GF

X7093(#1) Code share \* 100

X7096(#2) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not self-employed: X4106^=2 or 3/

X4706^=2 or 3; no businesses: X3103^=1; no actively

managed businesses: X3104^=1; working at all owned

businesses: X3113^=5 and X3213^=5 and X3313^=5/X3114^=5

and X3214^=5 and X3314^=5; R lives alone: X7001)

GF

X7094(#1) What is the cost basis for tax purposes? (What was your

X7097(#2) original investment?)

Code amount

-1. Nothing

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not self-employed: X4106^=2 or 3/

X4706^=2 or 3; no businesses: X3103^=1; no actively

managed businesses: X3104^=1; working at all owned

businesses: X3113^=5 and X3213^=5 and X3313^=5/X3114^=5

and X3214^=5 and X3314^=5; R lives alone: X7001)

X7402(#1) What kind of business or industry (do you/does your

X7412(#2) [wife/partner]) work in -- that is, what do they make or

do at the place where (you/[he/she]) work(s)?

Code Census 2003 4-digit industry code

Code Industry

Agriculture, Forestry, Fishing and Hunting

170 Crop production

180 Animal production

190 Forestry except Logging

270 Logging

280 Fishing, hunting, and trapping

290 Support activities for agriculture and forestry

Mining

370 Oil and gas extraction

380 Coal mining

390 Metal ore mining

470 Nonmetallic mineral mining and quarrying

480 Not specified type of mining

490 Support activities for mining

Utilities

570 Electric power generation, transmission and distribution

580 Natural gas distribution

590 Electric and gas, and other combinations

670 Water, steam, air conditioning, and irrigation systems

680 Sewage treatment facilities

690 Not specified utilities

Construction

770 Constructions (Includes the cleaning of buildings

and dwellings is incidental during construction and

immediately after construction)

Manufacturing

Nondurable Goods

Food Manufacturing

1070 Animal food, grain and oilseed milling

1080 Sugar and confectionery products

1090 Fruit and vegetable preserving and specialty foods

1170 Dairy products

1180 Animal slaughtering and processing

1190 Retail bakeries

1270 Bakeries, except retail

1280 Seafood and other miscellaneous food, n.e.c.

1290 Not specified food industries

Beverage and Tobacco Products Manufacturing

1370 Beverage

1390 Tobacco

Textile Mills and Textile Product Mills

1470 Fiber, yarn, and thread mills

1480 Fabric mills, except knitting

1490 Textile and fabric finishing and coating mills

1570 Carpets and rugs

1590 Textile product mills except carpets and rugs

Apparel Manufacturing

1670 Knitting mills

1680 Cut and sew apparel

1690 Apparel accessories and other apparel

Leather and Allied Product Manufacturing

1770 Footwear

1790 Leather tanning and products, except footwear

Paper Manufacturing

1870 Pulp, paper, and paperboard mills

1880 Paperboard containers and boxes

1890 Miscellaneous paper and pulp products

Printing and Related Support Activities

1990 Printing and related support activities

Petroleum and Coal Products Manufacturing

2070 Petroleum refining

2090 Miscellaneous petroleum and coal products

Chemical Manufacturing

2170 Resin, synthetic rubber and fibers, and filaments

2180 Agricultural chemicals

2190 Pharmaceuticals and medicines

2270 Paint, coating, and adhesives

2280 Soap, cleaning compound, and cosmetics

2290 Industrial and miscellaneous chemicals

Plastics and Rubber Product Manufacturing

2370 Plastics products

2380 Tires

2390 Rubber products, except tires

Durable Goods

Nonmetallic Mineral Product Manufacturing

2470 Pottery, ceramics, and related products

2480 Structural clay products

2490 Glass and glass products

2570 Cement, concrete, lime, and gypsum products

2590 Miscellaneous nonmetallic mineral products

Metal Industries

2670 Iron and steel mills and steel products

2680 Aluminum production and processing

2690 Nonferrous metal, except aluminum, production and

processing

2770 Foundries

2780 Metal forgings and stampings

2790 Cutlery and hand tools

2870 Structural metals, and tank and shipping containers

2880 Machine shops; turned products; screws, nuts and bolts

2890 Coating, engraving, heat treating and allied activities

2970 Ordnance

2980 Miscellaneous fabricated metal products

2990 Not specified metal industries

Machinery Manufacturing

3070 Agricultural implements

3080 Construction mining and oil field machinery

3090 Commercial and service industry machinery

3170 Metalworking machinery

3180 Engines, turbines, and power transmission equipment

3190 Machinery, n.e.c.

3290 Not specified machinery

Computer and Electronic Product Manufacturing

3360 Computer and peripheral equipment

3370 Communications, audio, and video equipment

3380 Navigational, measuring, electomedical,

and control instruments

3390 Electronic components and products, n.e.c.

Electrical Equipment, Appliances, and Component

Manufacturing

3470 Household appliances

3490 Electrical machinery, equipment, and supplies, n.e..c.

Transportation Equipment Manufacturing

3570 Motor vehicles and motor vehicle equipment

3580 Aircraft and parts

3590 Aerospace products and parts

3670 Railroad rolling stock

3680 Ship and boat building

3690 Other transportation equipment

Wood Products, including Furniture, Manufacturing

3770 Sawmills and wood preservation

3780 Veneer, plywood, and engineered wood products

3790 Prefabricated wood buildings and mobile homes

3870 Miscellaneous wood products

3890 Furniture and fixtures

Miscellaneous Manufacturing

3960 Medical equipment and supplies

3970 Toys, amusement, and sporting goods

3980 Miscellaneous manufacturing, n.e.c.

3990 Not specified industries

Wholesale Trade

Durable Goods, Wholesalers

4070 Motor vehicles, parts and supplies

4080 Furniture and home furnishing

4090 Lumber and other construction materials

4170 Professional and commercial equipment and supplies

4180 Metals and minerals, except petroleum

4190 Electrical goods

4260 Hardware, plumbing and heating equipment,and supplies

4270 Machinery, equipment, and supplies

4280 Recyclable materials

4290 Miscellaneous durable goods

Nondurable Goods, Wholesalers

4370 Paper and paper products

4380 Drugs, sundries, and chemical and allied products

4390 Apparel, fabrics, and notions

4470 Groceries and related products

4480 Farm product raw materials

4490 Petroleum and petroleum products

4560 Alcoholic beverages

4570 Farm supplies

4580 Miscellaneous nondurable goods

4585 Wholesale electronic markets, agents, and brokers

4590 Not specified trade

Retail Trade

4670 Automobile dealers

4680 Other motor vehicle dealers

4690 Auto parts, accessories, and tire stores

4770 Furniture and home furnishings stores

4780 Household appliance stores

4790 Radio, TV, and computer stores

4870 Building material and supplies dealers

4880 Hardware stores

4890 Lawn and garden equipment and supplies stores

4970 Grocery stores

4980 Specialty food stores

4990 Beer, wine, and liquor stores

5070 Pharmacies and drug stores

5080 Health and personal care, except drug, stores

5090 Gasoline stations

5170 Clothing and accessories, except shoe, stores

5180 Shoe stores

5190 Jewelry, luggage, and leather goods stores

5270 Sporting goods, camera, and hobby and toy stores

5280 Sewing, needlework and piece goods stores

5290 Music stores

5370 Book stores and news dealers

5380 Department stores and Discount stores

5390 Miscellaneous general merchandise stores

5470 Retail florists

5480 Office supplies and stationary stores

5490 Used merchandise stores

5570 Gift, novelty, and souvenir shops

5580 Miscellaneous stores

5590 Electronic shopping

5591 Electronic auctions

5592 Mail order houses

5670 Vending machine operators

5680 Fuel dealers

5690 Other direct selling establishments

5790 Not specified trade

Transportation and Warehousing

6070 Air transportation

6080 Rail transportation

6090 Water transportation

6170 Truck transportation

6180 Bus service and urban transit

6190 Taxi and limousine service

6270 Pipeline transportation

6280 Scenic and sightseeing transportation

6290 Services incidental to transportation

6370 Postal Service

6380 Couriers and messengers

6390 Warehousing and storage

Information and Communications

Publishing Industries

6470 Newspaper publishers

6480 Publishing, except newspapers and software

6490 Software publishing

6570 Motion pictures and video industries

6590 Sound recording industries

Broadcasting and Telecommunications

6670 Radio and television broadcasting and cable

6675 Internet and publishing and broadcasting

6680 Wired telecommunications carriers

6690 Other telecommunication services

6692 Internet service providers

6695 Data processing, hosting, and related services

Information Services and Data Processing Services

6770 Libraries and archives

6780 Other information services

Finance, Insurance, Real Estate, and Rental and Leasing

Finance and Insurance

6870 Banking and related activities

6880 Savings institutions, including credit unions

6890 Non-depository credit and related activities

6970 Securities, commodities, funds, trusts, and

other financial investments

6990 Insurance carriers and related activities

Real Estate and Rental and Leasing

7070 Real estate

7080 Automotive equipment rental and leasing

7170 Video tape and disk rental

7180 Other consumer goods rental

7190 Commercial, industrial, and other

intangible assets rental and leasing

Professional, Scientific, Management,

Administrative, and Waste Management Services

Professional, Scientific, and Technical Services

7270 Legal services

7280 Accounting, tax preparation, bookkeeping

and payroll services

7290 Architectural, engineering, and related services

7370 Specialized design services

7380 Computer systems design and related services

7390 Management, scientific and technical consulting services

7460 Scientific research and development services

7470 Advertising and related services

7480 Veterinary services

7490 Other professional, scientific and technical services

Management, Administrative and Support, and Waste

Management Services

7570 Management of companies and enterprises

7580 Employment services

7590 Business support services

7670 Travel arrangements and reservation services

7680 Investigation and security services

7690 Services to buildings and dwellings

(except cleaning during construction and

immediately after construction)

7770 Landscaping services

7780 Other administrative, and other support services

7790 Waste management and remediation services

Educational, Health and Social Services

Educational Services

7860 Elementary and secondary school

7870 Colleges, including junior colleges, and universities

7880 Business, technical, and trade schools and training

7890 other schools, instruction and educational services

Health Care

7970 Offices of physicians

7980 Offices of dentists

7990 Office of chiropractors

8070 Offices of optometrists

8080 Offices of other health practitioners

8090 Outpatient care centers

8170 Home health care services

8180 Other health care services

8190 Hospitals

8270 Nursing care facilities

8290 Residential care facilities, without nursing

Social Assistance

8370 Individual and family services

8380 Community food and housing, and emergencys ervices

8390 Vocational rehabilitation services

8470 Child day care services

Arts, Entertainment, Recreation, Accommodations,

and Food Services

Arts, Entertainment, and Recreation

8560 Independent artists, performing arts,

spectator sports and related industries

8570 Museums, art galleries, historical sites,

and similar institutions

8580 Bowling centers

5890 Other amusement, gambling, and recreation industries

Accommodations and Food Services

8660 Traveler accommodation

8670 Recreational vehicle parks and camps, and rooming

and boarding houses

8680 Restaurants and other food services

8690 Drinking places, alcohol beverages

Other Services (Except Public Administration)

Repair and Maintenance

8770 Automotive repair and maintenance

8780 Car washes

8790 Electronic and precision equipment repair and maintenance

8870 Commercial and industrial machinery and equipment

repair and maintenance

8880 Personal and household goods repair and maintenance

8890 Footwear and leather goods repair

Personal and Laundry Services

8970 Barber shops

8980 Beauty salons

8990 Nail salons and other personal care services

9070 Dry cleaning and laundry services

9080 Funeral homes, cemeteries and crematories

9090 Other personal services

Religious, Grantmaking, Civic, Business, and

Similar Organizations

9160 Religious organizations

9170 Civic, social, advocacy organizations

and grantmaking and giving services

9180 Labor unions

9190 Business, professional, political and similar

organizations

Private Households

9290 Private households

Public Administration

9370 Executive offices and legislative bodies

9380 Public finance activities

9390 Other general government and support

9470 Justice, public order, and safety activities

9480 Administration of human resource programs

9490 Administration of environmental quality

and housing programs

9570 Administration of economic programs and space research

9590 National security and international affairs

Armed Forces (for CPS only)

9890 Armed Forces

CPS Special Codes

9970 Problem Referral

9990 Uncodable (includes Refused, Retired,

reported Classified, or Not in Labor Force)

Active Duty Military (for Census and ACS)

9670 U.S. Army

9680 U.S. Air Force

9690 U.S. Navy

9770 U.S. Marines

9780 U.S. Coast Guard

9790 U.S. Armed Forces, Branch Not Specified

9870 Military Reserves or National Guard

ACS Special Codes

9950 Not in Labor Force

9960 Retired

9970 Problem Referral

9990 Uncodable (includes Refused or reported Classified)

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

In the public version of the data set, these codes have been

collapsed in the following way:

IF (170 <= 4-digit ind. code <=290) THEN ind. code=1;

ELSE IF (7480 <= 4-digit ind. code <=7480) THEN ind. code=1;

ELSE IF (7770 <= 4-digit ind. code <=7770) THEN ind. code=1;

ELSE IF (370 <= 4-digit ind. code <=490) THEN ind. code=2;

ELSE IF (770 <= 4-digit ind. code <=770) THEN ind. code=2;

ELSE IF (1070 <= 4-digit ind. code <=3990) THEN ind. code=3;

ELSE IF (6470 <= 4-digit ind. code <=6480) THEN ind. code=3;

ELSE IF (8560 <= 4-digit ind. code <=8560) THEN ind. code=3;

ELSE IF (4070 <= 4-digit ind. code <=5790) THEN ind. code=4;

ELSE IF (8680 <= 4-digit ind. code <=8690) THEN ind. code=4;

ELSE IF (6490 <= 4-digit ind. code <=6490) THEN ind. code=5;

ELSE IF (6695 <= 4-digit ind. code <=6695) THEN ind. code=5;

ELSE IF (6870 <= 4-digit ind. code <=7080) THEN ind. code=5;

ELSE IF (7190 <= 4-digit ind. code <=7190) THEN ind. code=5;

ELSE IF (7580 <= 4-digit ind. code <=7590) THEN ind. code=5;

ELSE IF (7680 <= 4-digit ind. code <=7680) THEN ind. code=5;

ELSE IF (8770 <= 4-digit ind. code <=8890) THEN ind. code=5;

ELSE IF (570 <= 4-digit ind. code <=690) THEN ind. code=6;

ELSE IF (6070 <= 4-digit ind. code <=6390) THEN ind. code=6;

ELSE IF (6570 <= 4-digit ind. code <=6692) THEN ind. code=6;

ELSE IF (6770 <= 4-digit ind. code <=6780) THEN ind. code=6;

ELSE IF (7170 <= 4-digit ind. code <=7180) THEN ind. code=6;

ELSE IF (7270 <= 4-digit ind. code <=7470) THEN ind. code=6;

ELSE IF (7490 <= 4-digit ind. code <=7570) THEN ind. code=6;

ELSE IF (7670 <= 4-digit ind. code <=7670) THEN ind. code=6;

ELSE IF (7690 <= 4-digit ind. code <=7690) THEN ind. code=6;

ELSE IF (7780 <= 4-digit ind. code <=8470) THEN ind. code=6;

ELSE IF (8570 <= 4-digit ind. code <=8670) THEN ind. code=6;

ELSE IF (8970 <= 4-digit ind. code <=9290) THEN ind. code=6;

ELSE IF (9370 <= 4-digit ind. code <=9890) THEN ind. code=7;

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7401(#1) What is the official title of your (wife's/partner's) job?

X7411(#2) (The title that (your/her/his) employer uses?)

PROBE: Is that the full title?

What sort of work (do you/does [he/she]) do on

(your/her/his) job? (Tell me little more about what (you

do/[he/she] does).)

Code Census 2003 4-digit occupation codes

Code Occupation

Executive, Administrative, and Managerial Occupations

10 Chief Executives

20 General and Operations Mangers

30 Legislators

40 Advertising and Promotions Managers

50 Marketing and Sales Managers

60 Public Relations Managers

100 Administrative Services Managers

110 Computer and Information Systems Managers

120 Financial Managers

130 Human Resources Managers

140 Industrial Production Managers

150 Purchasing Managers

160 Transportation, Storage, and Distribution Managers

200 Farm, Ranch, and Other Agricultural Managers

210 Farmers and Ranchers

220 Construction Managers

230 Education Administrators

300 Engineering Managers

310 Food Service Managers

320 Funeral Directors

330 Gaming Managers

340 Lodging Managers

350 Medical and Health Services Managers

360 Natural Sciences Managers

400 Postmasters and Mail Superintendents

410 Property, Real Estate, and Community Association Managers

420 Social and Community Service Managers

430 Managers, All Other

Management Related Occupations

500 Agents and Business Managers of Artists,

Performers, and Athletes

510 Purchasing Agents and Buyers, Farm Products

520 Wholesale and Retail Buyers, Except Farm Products

530 Purchasing Agents, Except Wholesale, Retail, and

Farm Products

540 Claims Adjusters, Appraisers, Examiners,

and Investigators

560 Compliance Officers, Except Agriculture,

Constructions, Health and Safety, and

Transportation

600 Cost Estimators

620 Human Resources, Training, and Labor Relations Specialists

700 Logisticians

710 Management Analysts

720 Meeting and Convention Planners

730 Other Business Operations Specialists

800 Accountants and Auditors

810 Appraisers and Assessors of Real Estate

820 Budget Analysts

830 Credit Analysts

840 Financial Analysts

850 Personal Finance Advisors

860 Insurance Underwriters

900 Financial Examiners

910 Loan Counselors and Officers

930 Tax Examiners, Collectors, and Revenue Agents

940 Tax Preparers

950 Financial Specialists, All Other

Mathematical and Computer Scientists

1000 Computer Scientists and Systems Analysts

1010 Computer Programmers

1020 Computer Software Engineers

1040 Computer Support Specialists

1060 Database Administrators

1100 Network and Computer Systems Administrators

1110 Network Systems and Data Communications Analysts

1200 Actuaries

1210 Mathematicians

1220 Operations Research Analysts

1230 Statisticians

1240 Miscellaneous Mathematical Occupations

Engineers, Architects, and Surveyors

1300 Architects, Except Naval

1310 Surveyors, Cartographers, and Photogrammetrists

1320 Aerospace Engineers

1330 Agriculture Engineers

1340 Biomedical Engineers

1350 Chemical Engineers

1360 Civil Engineers

1400 Computer Hardware Engineers

1410 Electrical and Electronics Engineers

1420 Environmental Engineers

1430 Industrial Engineers, Including Health and Safety

1440 Marine Engineers and Naval Architects

1450 Materials Engineers

1460 Mechanical Engineers

1500 Mining and Geological Engineers, Including Mining

Safety Engineers

1510 Nuclear Engineers

1520 Petroleum Engineers

1530 Engineers, All Other

Engineering and Related Technicians

1540 Drafters

1550 Engineering Technicians, Except Drafters

1560 Surveying and Mapping Technicians

Physical Scientists

1600 Agricultural and Food Scientists

1610 Biological Scientists

1640 Conservation Scientists and Foresters

1650 Medical Scientists

1700 Astronomers and Physicists

1710 Atmospheric and Space Scientists

1720 Chemists and Materials Scientists

1740 Environmental Scientists and Geoscientists

1760 Physical Scientists, All Other

Social Scientists and Related Workers

1800 Economists

1810 Market and Survey Researchers

1820 Psychologists

1830 Sociologists

1840 Urban and Regional Planners

1860 Miscellaneous Social Scientists and Related Workers

Life, Physical, and Social Science Technicians

1900 Agriculture and Foods Science Technicians

1910 Biological Technicians

1920 Chemical Technicians

1930 Geological and Petroleum Technicians

1940 Nuclear Technicians

1960 Other Life, Physical, and Social Science Technicians

Counselors, Social, and Religious Workers

2000 Counselors

2010 Social Workers

2020 Miscellaneous Community and Social ServiceSpecialists

2040 Clergy

2050 Directors, Religious Activities and Education

2060 Religious Workers, All Other

Lawyers, Judges, and Legal Support Workers

2100 Lawyers

2110 Judges, Magistrates, and Other Judicial Workers

2140 Paralegals and Legal Assistants

2150 Miscellaneous Legal Support Workers

Teachers

2200 Postsecondary Teachers

2300 Preschool and Kindergarten Teachers

2310 Elementary and Middle School Teachers

2320 Secondary School Teachers

2330 Special Education Teachers

2340 Other Teachers and Instructors

Education, Training, and Library Workers

2400 Archivists, Curators, and Museum Technicians

2430 Librarians

2440 Library Technicians

2540 Teacher Assistants

2550 Other Education, Training, and Library Workers

Entertainers and Performers, Sports and Related Workers

2600 Artists and Related Workers

2630 Designers

2700 Actors

2710 Producers and Directors

2720 Athletes, Coaches, Umpires, and Related Workers

2740 Dancers and Choreographers

2750 Musicians, Singers, and Related Workers

2760 Entertainers and Performers, Sports and Related

Workers, All Other

Media and Communication Workers

2800 Announcers

2810 News Analysts, Reporters and Correspondents

2820 Public Relations Specialists

2830 Editors

2840 Technical Writers

2850 Writers and Authors

2860 Miscellaneous Media and Communication Workers

2900 Broadcast and Sound Engineering Technicians and

Radio Operators

2910 Photographers

2920 Television, Video, and Motion Picture Camera

Operators and Editors

2960 Media and Communication Equipment Workers, All Other

Health Diagnosing and Treating Practitioners

3000 Chiropractors

3010 Dentists

3030 Dietitians and Nutritionists

3040 Optometrists

3050 Pharmacists

3060 Physicians and Surgeons

3110 Physician Assistants

3120 Podiatrists

3130 Registered Nurses

3140 Audiologists

3150 Occupational Therapists

3160 Physical Therapists

3200 Radiation Therapists

3210 Recreational Therapists

3220 Respiratory Therapists

3230 Speech-Language Pathologists

3240 Therapists, All Other

3250 Veterinarians

3260 Health Diagnosing and Treating Practitioners, All Other

Health Care Technical and Support Occupations

3300 Clinical Laboratory Technologists and Technicians

3310 Dental Hygienists

3320 Diagnostic Related Technologists and Technicians

3400 Emergency Medical Technicians and Paramedics

3410 Health Diagnosing and Treating Practitioner

Support Technicians

3500 Licensed Practical and Licensed Vocational Nurses

3510 Medical Records and Health Information Technicians

3520 Opticians, Dispensing

3530 Miscellaneous Health Technologists and Technicians

3540 Other Healthcare Practitioners and Technical Occupations

3600 Nursing, Psychiatric, and Home Health Aides

3610 Occupational Therapist Assistants and Aides

3620 Physical Therapist Assistants and Aides

3630 Massage Therapists

3640 Dental Assistants

3650 Medical Assistants and Other Healthcare Support

Occupations

Protective Service Occupations

3700 First-Line Supervisors/Managers of Correctional Officers

3710 First-Line Supervisors/Managers of Police and Detectives

3720 First-Line Supervisors/Managers of Fire Fighting

and Prevention Workers

3730 Supervisors, Protective Service Workers, All Other

3740 Fire Fighters

3750 Fire Inspectors

3800 Bailiffs, Correctional Officers, and Jailers

3820 Detectives and Criminal Investigators

3830 Fish and Game Wardens

3840 Parking Enforcement Workers

3850 Police and Sheriff's Patrol Officers

3860 Transit and Railroad Police

3900 Animal Control Workers

3910 Private Detectives and Investigators

3920 Security Guards and Gaming Surveillance Officers

3940 Crossing Guards

3950 Lifeguards and Other Protective Service Workers

Food Preparation and Serving Related Occupations

4000 Chefs and Head Cooks

4010 First-Line Supervisors/Managers of Food

Preparation and Serving Workers

4020 Cooks

4030 Food Preparation Workers

4040 Bartenders

4050 Combined Food Preparation and Serving Workers,

Including Fast Food

4060 Counter Attendants, Cafeteria, Food Concession,

and Coffee Shop

4110 Waiters and Waitresses

4120 Food Servers, Nonrestaurant

4130 Dining Room and Cafeteria Attendants and

Bartender Helpers

4140 Dishwashers

4150 Hosts and Hostesses, Restaurant, Lounge, and

Coffee Shop

4160 Food Preparation and Serving Related Workers, All

Other

Cleaning and Building Service Occupations

4200 First-Line Supervisors/Managers of Housekeeping

and Janitorial Workers

4210 First-Line Supervisors/Managers of Landscaping,

Lawn Service, and Groundskeeping Workers

4220 Janitors and Building Cleaners

4230 Maids and Housekeeping Cleaners

4240 Pest Control Workers

4250 Grounds Maintenance Workers

Entertainment Attendants and Related Workers

4300 First-Line Supervisors/Managers of Gaming Workers

4320 First-Line Supervisors/Managers of Personal

Service Workers

4340 Animal Trainers

4350 Nonfarm Animal Caretakers

4400 Gaming Services Workers

4410 Motion Picture Projectionists

4420 Ushers, Lobby Attendants, and Ticket Takers

4430 Miscellaneous Entertainment Attendants and

Related Workers

Funeral Related Occupations

4460 Funeral Service Workers

Personal Care and Service Workers

4500 Barbers

4510 Hairdressers, Hairstylists, and Cosmetologists

4520 Miscellaneous Personal Appearance Workers

4530 Baggage Porters, Bellhops, and Concierges

4540 Tour and Travel Guides

4550 Transportation Attendants

4600 Child Care Workers

4610 Personal and Home Care Aides

4620 Recreation and Fitness Workers

4640 Residential Advisors

4650 Personal Care and Service Workers, All Other

Sales and Related Workers

4700 First-Line Supervisors/Managers of Retail Sales Workers

4710 First-Line Supervisors/Managers of Non-Retail

Sales Workers

4720 Cashiers

4740 Counter and Rental Clerks

4750 Parts Salespersons

4760 Retail Salespersons

4800 Advertising Sales Agents

4810 Insurance Sales Agents

4820 Securities, Commodities, and Financial Services

Sales Agents

4830 Travel Agents

4840 Sales Representatives, Services, All Other

4850 Sales Representatives, Wholesale and Manufacturing

4900 Models, Demonstrators, and Product Promoters

4920 Real Estate Brokers and Sales Agents

4930 Sales Engineers

4940 Telemarketers

4950 Door-To-Door Sales Workers, News and Street

Vendors, and Related Workers

4960 Sales and Related Workers, All Other

Office and Administrative Support Workers

5000 First-Line Supervisors/Managers of Office and

Administrative Support Workers

5010 Switchboard Operators, Including Answering Service

5020 Telephone Operators

5030 Communications Equipment Operators, All Other

5100 Bill and Account Collectors

5110 Billing and Posting Clerks and Machine Operators

5120 Bookkeeping, Accounting, and Auditing Clerks

5130 Gaming Cage Workers

5140 Payroll and Timekeeping Clerks

5150 Procurement Clerks

5160 Tellers

5200 Brokerage Clerks

5210 Correspondence Clerks

5220 Court, Municipal, and License Clerks

5230 Credit Authorizers, Checkers, and Clerks

5240 Customer Service Representatives

5250 Eligibility Interviewers, Government Programs

5260 File Clerks

5300 Hotel, Motel, and Resort Desk Clerks

5310 Interviewers, Except Eligibility and Loan

5320 Library Assistants, Clerical

5330 Loan Interviewers and Clerks

5340 New Accounts Clerks

5350 Order Clerks

5360 Human Resources Assistants, Except Payroll and

Timekeeping

5400 Receptionists and Information Clerks

5410 Reservation and Transportation Ticket Agents and

Travel Clerks

5420 Information and Record Clerks, All Other

5500 Cargo and Freight Agents

5510 Couriers and Messengers

5520 Dispatchers

5530 Meter Readers, Utilities

5540 Postal Service Clerks

5550 Postal Service Mail Carriers

5560 Postal Service Mail Sorters, Processors, and

Processing Machine Operators

5600 Production, Planning, and Expediting Clerks

5610 Shipping, Receiving, and Traffic Clerks

5620 Stock Clerks and Order Fillers

5630 Weighers, Measurers, Checkers, and Samplers,

Recordkeeping

5700 Secretaries and Administrative Assistants

5800 Computer Operators

5810 Data Entry Keyers

5820 Word Processors and Typists

5830 Desktop Publishers

5840 Insurance Claims and Policy Processing Clerks

5850 Mail Clerks and Mail Machine Operators, Except

Postal Service

5860 Office Clerks, General

5900 Office Machine Operators, Except Computer

5910 Proofreaders and Copy Markers

5920 Statistical Assistants

5930 Office and Administrative Support Workers, All Other

Farming, Fishing, and Forestry Occupations

6000 First-Line Supervisors/Managers/Contractors of

Farming, Fishing, and Forestry Workers

6010 Agricultural Inspectors

6020 Animal Breeders

6040 Graders and Sorters, Agricultural Products

6050 Other Agricultural Workers

6100 Fishers and Related Fishing Workers

6110 Hunters and Trappers

6120 Forest and Conservation Workers

6130 Logging Workers

Construction Trades and Extraction Workers

6200 First-Line Supervisor/Managers of Construction

Trades and Extraction Workers

6210 Boilermakers

6220 Brickmasons, Blockmasons, and Stonemasons

6230 Carpenters

6240 Carpet, Floor, and Tile Installers and Finishers

6250 Cement Masons, Concrete Finishers, and Terrazzo Workers

6260 Construction Laborers

6300 Paving, Surfacing, and Tamping Equipment Operations

6310 Pile-Driver Operators

6320 Operating Engineers and Other Construction

Equipment Operators

6330 Drywall Installers, Ceiling Tile Installers, and Tapers

6350 Electricians

6360 Glaziers

6400 Insulation Workers

6420 Painters, Construction and Maintenance

6430 Paperhangers

6440 Pipelayers, Plumbers, Pipefitters, and Steamfitters

6460 Plasterers and Stucco Masons

6500 Reinforcing Iron and Rebar Workers

6510 Roofers

6520 Sheet Metal Workers

6530 Structural Iron and Steel Workers

6600 Helpers, Construction Trades

6660 Construction and Building Inspectors

6700 Elevator Installers and Repairers

6710 Fence Erectors

6720 Hazardous Materials Removal Workers

6730 Highway Maintenance Workers

6740 Rail-Track Laying and Maintenance Equipment Operators

6750 Septic Tank Servicers and Sewer Pipe Cleaners

6760 Miscellaneous Constructions and Related Workers

6800 Derrick, Rotary Drill, and Service Unit

Operators, Oil,Gas, and Mining

6820 Earth Drillers, Except Oil and Gas

6830 Explosives Workers, Ordnance Handling Experts,

and Blasters

6840 Mining Machine Operators

6910 Roof Bolters, Mining

6920 Roustabouts, Oil and Gas

6930 Helpers - Extraction Workers

6940 Other Extraction Workers

Installation, Maintenance, and Repair's Workers

7000 First-Line Supervisors/Managers of Mechanics,

Installers, and Repairers

7010 Computer, Automated Teller, and Office Machine

Repairers

7020 Radio and Telecommunications Equipment Installers

and Repairers

7030 Avionics Technicians

7040 Electric Motor, Power Tool, and Related Repairers

7050 Electrical and Electronics Installers and

Repairers, Transportation Equipment

7100 Electrical and Electronics Repairers, Industrial

and Utility

7110 Electronic Equipment Installers and Repairers,

Motor Vehicles

7120 Electronic Home Entertainment Equipment

Installers and Repairers

7130 Security and Fire Alarm Systems Installers

7140 Aircraft Mechanics and Service Technicians

7150 Automotive Body and Related Repairers

7160 Automotive Glass Installers and Repairers

7200 Automotive Service Technicians and Mechanics

7210 Bus and Truck Mechanics and Diesel Engine Specialists

7220 Heavy Vehicle and Mobile Equipment Service

Technicians and Mechanics

7240 Small Engine Mechanics

7260 Miscellaneous Vehicle and Mobile Equipment

Mechanics, Installers, and Repairers

7300 Control and Valve Installers and Repairers

7310 Heating, Air Conditioning, and Refrigeration

Mechanics and Installers

7320 Home Appliance Repairers

7330 Industrial and Refractory Machinery Mechanics

7340 Maintenance and Repair Workers, General

7350 Maintenance Workers, Machinery

7360 Millwrights

7410 Electrical Power-Line Installers and Repairers

7420 Telecommunications Line Installers and Repairers

7430 Precision Instrument and Equipment Repairers

7510 Coin, Vending, and Amusement Machine Servicers

and Repairers

7520 Commercial Divers

7540 Locksmiths and Safe Repairers

7550 Manufactured Building and Mobile Home Installers

7560 Riggers

7600 Signal and Track Switch Repairers

7610 Helpers - Installation, Maintenance, and Repair Workers

7620 Other Installation, Maintenance, and Repair Workers

Production and Operating Workers

7700 First-Line Supervisors/Managers of Production and

Operating Workers

7710 Aircraft Structure, Surfaces, Rigging, and

Systems Assemblers

7720 Electrical, Electronics, and Electromechanical Assemblers

7730 Engine and Other Machine Assemblers

7740 Structural Metal Fabricators and Fitters

7750 Miscellaneous Assemblers and Fabricators

Food Preparation Occupations

7800 Bakers

7810 Butchers and Other Meat, Poultry, and Fish

Processing Workers

7830 Food and Tobacco Roasting, Baking, and Drying

Machine Operators and Tenders

7840 Food Batchmakers

7850 Food Cooking Machine Operators and Tenders

Setter, Operators, and Tenders

7900 Computer Control Programmers and Operators

7920 Extruding and Drawing Machine Setters, Operators,

and Tenders, Metal and Plastic

7930 Forging Machine Setters, Operators, and Tenders,

Metal and Plastic

7940 Rolling Machine Setters, Operators, and Tenders,

Metal and Plastic

7950 Cutting, Punching, and Press Machine Setters,

Operators, and Tenders, Metal and Plastic

7960 Drilling and Boring Machine Tool Setters,

Operators, and Tenders, Metal and Plastic

8000 Grinding, Lapping, Polishing, and Buffing Machine

Tool Setters, Operators, and Tenders, Metal and Plastic

8010 Lathe and Turning Machine Tool Setters, Operators

and Tenders, Metal and Plastic

8020 Milling and Planing Machine Setters, Operators,

and Tenders, Metal and Plastic

8030 Machinists

8040 Metal Furnace and Kiln Operators and Tenders

8060 Model Makers and Patternmakers, Metal and Plastic

8100 Molders and Molding Machine Setters, Operators,

and Tenders, Metal and Plastic

8120 Multiple Machine Tool Setters, Operators, and

Tenders, Metal and Plastic

8130 Tool and Die Makers

8140 Welding, Soldering, and Brazing Workers

8150 Heat Treating Equipment Setters, Operators, and

Tenders, Metal and Plastic

8160 Lay-Out Workers, Metal and Plastic

8200 Plating and Coating Machine Setters, Operators,

and Tenders, Metal and Plastic

8210 Tool Grinders, Filers, and Sharpeners

8220 Metalworkers and Plastic Workers, All Other

8230 Bookbinders and Bindery Workers

8240 Job Printers

8250 Prepress Technicians and Workers

8260 Printing Machine Operators

8300 Laundry and Dry-Cleaning Workers

8310 Pressers, Textile, Garment, and Related Materials

8320 Sewing Machine Operator

8330 Shoe and Leather Workers and Repairers

8340 Shoe Machine Operators and Tenders

8350 Tailors, Dressmakers, and Sewers

8360 Textile Bleaching and Dyeing Machine Operators

and Tenders

8400 Textile Cutting Machine Setters, Operators, and Tenders

8410 Textile Knitting and Weaving Machine Setters,

Operators, and Tenders

8420 Textile Winding, Twisting, and Drawing Out

Machine Setters, Operators, and Tenders

8430 Extruding and Forming Machine Setters, Operators,

and Tenders, Synthetic and Glass Fibers

8440 Fabric and Apparel Patternmakers

8450 Upholsters

8460 Textile, Apparel, and Furnishings Workers, All Other

8500 Cabinetmakers and Bench Carpenters

8510 Furniture Finishers

8520 Model Makers and Patternmakers, Wood

8530 Sawing Machine Setters, Operators, and Tenders, Wood

8540 Woodworking Machine Setters, Operators, and

Tenders, Except Sawing

8550 Woodworkers, All Other

8600 Power Plant Operators

8610 Stationary Engineers and Boiler Operators

8620 Water and Liquid Waste Treatment Plant and System

Operators

8630 Miscellaneous Plant and System Operators

8640 Chemical Processing Machine Setters, Operators,

and Tenders

8650 Crushing, Grinding, Polishing, Mixing, and

Blending Workers

8710 Cutting Workers

8720 Extruding, Forming, Pressing, and Compacting

Machine Setters, Operators, and Tenders

8730 Furnace, Kiln, Oven, Drier, and Kettle Operators

and Tenders

8740 Inspectors, Testers, Sorters, Samplers, and Weighers

8750 Jewelers and Precious Stone and Metal Workers

8760 Medical, Dental, and Ophthalmic Laboratory Technicians

8800 Packaging and Filling Machine Operators and Tenders

8810 Painting Workers

8830 Photographic Process Workers and Processing

Machine Operators

8840 Semiconductor Processors

8850 Cementing and Gluing Machine Operators and Tenders

8860 Cleaning, Washing, and Metal Pickling Equipment

Operators and Tenders

8900 Cooling and Freezing Equipment Operators and Tenders

8910 Etchers and Engravers

8920 Molders, Shapers, and Casters, Except Metal and Plastic

8930 Paper Goods Machine Setters, Operators, and Tenders

8940 Tire Builders

8950 Helpers - Production Workers

8960 Production Workers, All Other

Transportation and Material Moving Workers

9000 Supervisors, Transportation and Material Moving Workers

9030 Aircraft Pilots and Flight Engineers

9040 Air Traffic Controllers and Airfield Operations

Specialists

9110 Ambulance Drivers and Attendants, Except

Emergency Medical Technicians

9120 Bus Drivers

9130 Driver/Sales Workers and Truck Drivers

9140 Taxi Drivers and Chauffeurs

9150 Motor Vehicle Operators, All Other

9200 Locomotive Engineers and Operators

9230 Railroad Brake, Signal, and Switch Operators

9240 Railroad Conductors and Yardmasters

9260 Subway, Streetcar, and Other Rail Transportation Workers

9300 Sailors and Marine Oilers

9310 Ship and Boat Captains and Operators

9330 Ship Engineers

9340 Bridge and Lock Tenders

9350 Parking Lot Attendants

9360 Service Station Attendants

9410 Transportation Inspectors

9420 Other Transportation Workers

9500 Conveyor Operators and Tenders

9510 Crane and Tower Operators

9520 Dredge, Excavating, and Loading Machine Operators

9560 Hoist and Winch Operators

9600 Industrial Truck and Tractor Operators

9610 Cleaners of Vehicles and Equipment

9620 Laborers and Freight, Stock, and Material Movers,

Hand

9630 Machine Feeders and Offbearers

9640 Packers and Packagers, Hand

9650 Pumping Station Operators

9720 Refuse and Recyclable Material Collectors

9730 Shuttle Car Operators

9740 Tank Car, Truck, and Ship Loaders

9750 Material Moving Workers, All Other

Armed Forces (for CPS)

9840 Armed Forces

CPS Special Codes

9970 Problem Referral

9990 Not Reported (Includes Refused, Classified, Blank

and all other noncodable)

Military Specific Occupations (for ACS)

9800 Military officer special and tactical

operationsleaders/managers

9810 First-line enlisted military supervisor/managers

9820 Military enlisted tactical operations and

air/weapons specialists and crew members

9830 Military, rank not specified

ACS Special Codes

9950 Not in Labor Force

9960 Retired

9970 Problem Referral

9990 Uncodable (includes Refused or Classified)

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

In the public version of the data set, these codes have been

collapsed in the following way:

IF (10 <= 4-digit occ. code <=200) THEN occ. code=1;

IF (220 <= 4-digit occ. code <=1530) THEN occ. code=1;

IF (1600 <= 4-digit occ. code <=1860) THEN occ. code=1;

IF (2000 <= 4-digit occ. code <=3650) THEN occ. code=1;

ELSE IF (1540 <= 4-digit occ. code <=1560) THEN occ. code=2;

ELSE IF (4700 <= 4-digit occ. code <=5930) THEN occ. code=2;

ELSE IF (1900 <= 4-digit occ. code <=1960) THEN occ. code=2;

ELSE IF (7900 <= 4-digit occ. code <=7900) THEN occ. code=2;

ELSE IF (3700 <= 4-digit occ. code <=4320) THEN occ. code=3;

ELSE IF (4400 <= 4-digit occ. code <=4400) THEN occ. code=3;

ELSE IF (4420 <= 4-digit occ. code <=4650) THEN occ. code=3;

ELSE IF (9840 <= 4-digit occ. code <=9840) THEN occ. code=3;

ELSE IF (6200 <= 4-digit occ. code <=7850) THEN occ. code=4;

ELSE IF (8330 <= 4-digit occ. code <=8330) THEN occ. code=4;

ELSE IF (8350 <= 4-digit occ. code <=8350) THEN occ. code=4;

ELSE IF (8440 <= 4-digit occ. code <=8630) THEN occ. code=4;

ELSE IF (8740 <= 4-digit occ. code <=8760) THEN occ. code=4;

ELSE IF (8810 <= 4-digit occ. code <=8810) THEN occ. code=4;

ELSE IF (4410 <= 4-digit occ. code <=4410) THEN occ. code=5;

ELSE IF (7920 <= 4-digit occ. code <=8320) THEN occ. code=5;

ELSE IF (8340 <= 4-digit occ. code <=8340) THEN occ. code=5;

ELSE IF (8360 <= 4-digit occ. code <=8430) THEN occ. code=5;

ELSE IF (8640 <= 4-digit occ. code <=8730) THEN occ. code=5;

ELSE IF (8800 <= 4-digit occ. code <=8800) THEN occ. code=5;

ELSE IF (8830 <= 4-digit occ. code <=9750) THEN occ. code=5;

ELSE IF (210 <= 4-digit occ. code <=210) THEN occ. code=6;

ELSE IF (4340 <= 4-digit occ. code <=4350) THEN occ. code=6;

ELSE IF (6000 <= 4-digit occ. code <=6130) THEN occ. code=6;

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

-----------------------------------------------------------------------------

INFORMATION LINKED FROM 2004 CURRENT POPULATION SURVEY BY OCCUPATION CODE

-----------------------------------------------------------------------------

X8112(#1) Recode: Average for occupation group of fraction of last 52

X8113(#2) weeks worked; multipled by 10

Code number

0. Inap. (/no spouse; no job: X7401=0/X7411=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X8114(#1) Recode: Average for occupation group of hours worked per year

X8115(#2) in 2004; multiplied by 10

Code number

0. Inap. (/no spouse; no job: X7401=0/X7411=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X8116(#1) Recode: Fraction of occupation group unemployed in 2004;

X8117(#2) multiplied by 1000

Code number

0. Inap. (/no spouse; no job: X7401=0/X7411=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X8169(#1) Recode: Unconditional mean wage for occupation group in 2004

X8170(#2)

Code number

0. Inap. (/no spouse; no job: X7401=0/X7411=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

For each occupation group, regressions were run separately

for males and females of the log of annualized wages on a

constant, a spline on age (AGE, MAX(0, AGE-35),

MAX(0,AGE-55)), a dummy variable for part-time employment

(1 = working fewer than 20 hours per week), a dummy variable

for self-employment (1 = self-employed), a dummy for race

(1 = Hispanic or non-white), and dummy variables for years

of education (1 = : 12 years of education, some college or

an Associate's degree, Bachelor's degree, higher degree

than Bachelor's degree). If there were too few people in a CPS

3-digit occupation group, either the SCF case was matched to

a neighboring occupation group, or the match was made at the

level of the 2-digit occupation code. Some of the model

coefficients may be identically zero where there are too few

cases in the appropriate cells in the CPS data to identify

these coefficients; for example, a coefficient for the

[36,55) element of the age spline may be identically zero

if there are no CPS cases in that age group for the given

occupation.

X8105(#1) Recode: 10000 \* Intercept

X8106(#2)

Code number

0. Inap. (/no spouse; no job: X7401=0/X7411=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X8099(#1) Recode: For age in [1, 35]: 10000 \* Coefficient of AGE

X8100(#2)

Code number

0. Inap. (/no spouse; no job: X7401=0/X7411=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X8101(#1) Recode: For age in [36, 55]: 10000 \* Coefficient of MAX(0,AGE-35)

X8102(#2)

Code number

0. Inap. (/no spouse; no job: X7401=0/X7411=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X8103(#1) Recode: For age in [55, 999]: 10000 \* Coefficient of MAX(0,AGE-55)

X8104(#2)

Code number

0. Inap. (/no spouse; no job: X7401=0/X7411=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X8318(#1) Recode: 10000 \* Coefficient of dummy for part-time employment

X8319(#2)

Code number

0. Inap. (/no spouse; no job: X7401=0/X7411=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X8320(#1) Recode: 10000 \* Coefficient of dummy for self-employment

X8321(#2)

Code number

0. Inap. (/no spouse; no job: X7401=0/X7411=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X8322(#1) Recode: 10000 \* Coefficient of dummy for Hispanic or nonwhite

X8323(#2)

Code number

0. Inap. (/no spouse; no job: X7401=0/X7411=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X8324(#1) Recode: 10000 \* Coefficient of dummy for 12 years of education

X8325(#2)

Code number

0. Inap. (/no spouse; no job: X7401=0/X7411=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X8326(#1) Recode: 10000 \* Coefficient of dummy for some college or

X8327(#2) Associate's degree

Code number

0. Inap. (/no spouse; no job: X7401=0/X7411=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X8328(#1) Recode: 10000 \* Coefficient of dummy for Bachelor's degree

X8329(#2)

Code number

0. Inap. (/no spouse; no job: X7401=0/X7411=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X8330(#1) Recode: 10000 \* Coefficient of dummy for higher degree than

X8331(#2) Bachelor's degree

Code number

0. Inap. (/no spouse; no job: X7401=0/X7411=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X8107(#1) Recode: 10000 \* Standard error log regression

X8108(#2)

Code number

0. Inap. (/no spouse; no job: X7401=0/X7411=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X8109(#1) Recode: Annualized level of expected income from regression

X8111(#2) (corrected for non-zero expectation of error term for level)

Code number

0. Inap. (/no spouse; no job: X7401=0/X7411=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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-----------------------------------------------------------------------------

X4110(#1) How many hours (do you/does [he/she]) work on

X4710(#2) (your/her/his) main job in a normal week? (NOT SELF-EMPLOYED)

How many hours (do you/does [he/she]) work in

this business in a normal week? (SELF-EMPLOYED)

RECORD THE NUMBER OF HOURS (R/SP) WORKS IN A NORMAL WEEK,

NOT THE OFFICIAL NUMBER OF HOURS (R/SP) IS PAID TO WORK.

Code number of hours

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse)

X4111(#1) INTERVIEWER: READ SLOWLY

X4711(#2)

Counting paid vacations as weeks of work, how many weeks

(do you/does your [wife/partner]) work on this job in a

normal year?

WEEKS FOR WORK PLUS PAID VACATIONS AND SICK LEAVE.

Code number of weeks

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse)

X4125(#1) How (are you/is [he/she]) paid? (Are you/Is [he/she]) paid

X4725(#2) a regular salary or wages?

1. \*YES

5. \*NO

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not self-employed: X4106^=2 or 3/

X4706^=2 or 3)

X4112(#1) About how much (do you/does [he/she]) earn before taxes

X4712(#2) on (your/her/his) main job? (NOT SELF-EMPLOYED)

INCLUDE NORMAL OVERTIME, BONUSES, AND TIPS.

IF WAGE IS HOURLY, ENTER DOLLARS AND CENTS.

CONFIRMATION SCREEN WILL ONLY SHOW DOLLARS.

How much in salary or wages (are you/is [he/she]) paid

before taxes? (SELF-EMPLOYED)

Code amount

-1. Nothing

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; self-employed and not receiving salary:

X4106^=1 and X4125^=1/X4706^=1 and X4725^=1)

X4113(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X4713(#2) (And how often (do you/does [he/she]) receive that amount?)

Code frequency

1. \*Day

2. \*Week

3. \*Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only/in total

11. \*Twice per year; every six months

12. Every two months

14. \*By the piece/job

18. \*Hour

22. Varies

31. \*Twice a month

-1. Nothing

-7. \*Other

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; self-employed and not receiving salary:

X4106^=1 and X4125^=1/X4706^=1 and X4725^=1)

X4127(#1) (Do you/Does [he/she]) also receive a portion of the net

X4727(#2) earnings, or some other kind of income?

(Do you/Does [he/she]) receive a portion of the net

earnings, or some other kind of income?

1. \*YES

5. \*NO

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not self-employed: X4106^=2 or 3/

X4706^=2 or 3)

X4131(#1) In addition to regular salary, how much (do you/does

X4731(#2) [he/she]) personally receive from the business before taxes?

How much (do you/does [he/she]) personally receive from the

business before taxes?

What did (you/[he/she]) get in 2003?

Code amount

-1. Nothing

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not self-employed: X4106^=2 or 3/

X4706^=2 or 3; no net earnings from business:

X4127^=1/X4727^=1)

X4132(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X4732(#2) (And how often (do you/does [he/she]) receive that amount?)

Code frequency

1. \*Day

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only/in total

11. \*Twice per year; every six months

12. Every two months

14. \*By the piece/job

18. \*Hour

21. Three times a year

22. Varies

31. \*Twice a month

-1. Nothing

-7. \*Other

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not self-employed: X4106^=2 or 3/

X4706^=2 or 3; no net earnings from business:

X4127^=1/X4727^=1)

X6797(#1) Some employers give their employees financial options that

X6798(#2) can be used to purchase company stock at a later time.

During the past year, has your current employer given you

any of these, either as a regular part of your

compensation, or as a bonus?

Some employers give their employees financial options that

can be used to purchase company stock at a later time.

During the past year, has your (wife/partner)'s current

employer given (him/her) any of these, either as a regular

part of (his/her) compensation, or as a bonus?

DO NOT INCLUDE DIRECT TRANSFERS OF STOCK, OR PENSION ARRANGEMENTS.

1. \*YES

5. \*NO

0. Inap. (not working or expecting to go back to work or

not working for someone else: X6670-X6677^=1 or

X4101=5 or X4105=5 or X4106=(2, 3, -7)/X6678-X6685^=1

or X4701=5 or X4705=5 or X4706=(2,3,-7);/no spouse)

GF

X4114(#1) About how many employees work for this company or

X4714(#2) organization, including all locations? (PROBE: Is it

fewer than 10, 10 to 19, 20 to 99, 100 to 499, or 500

or more?)

1. \*Less than 10

2. \*10 to 19

3. \*20 to 99

4. \*100 to 499

5. \*500 or MORE

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse)

How many years in total (have you/has [he/she]) worked for

this employer?

(RECORD LESS THAN ONE YEAR AS 00)

INCLUDE ALL YEARS WITH CURRENT EMPLOYER, EVEN IF IN SEVERAL

SPELLS.

X4115(#1) Code number of years

X4715(#2) -1. Less than one year

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 50

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X7199(#1) Code age

X7266(#2) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT CURRENT AGE-50

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7679(#1) Code year (4 digits)

X7706(#2) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse)

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FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-50

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How many years (do you/does [he/she]) expect to continue

working for this employer?

(RECORD LESS THAN ONE YEAR AS 00)

X4116(#1) \*Code number of years

X4716(#2) -1. Less than a year

-2. \*NEVER STOP

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse)

X7680(#1) \*Code age

X7707(#2) -2. \*NEVER STOP

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse)

X7200(#1) \*Code year (4 digits)

X7267(#2) -2. \*NEVER STOP

X4117(#1) (Are you/Is [he/she]) covered on this job by a union or

X4717(#2) employee-association contract?

1. \*YES

5. \*NO

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse)

X7681(#1) (Do you/Does [he/she]) have any type of insurance other

X7708(#2) than Social Security, that would help provide (you/her/him)

with income in the event that (you/[he/she]) became disabled?

INCLUDE SUCH INSURANCE REGARDLESS OF SOURCE

1. \*YES

5. \*NO

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse)

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

PENSION FOR HEAD AND SPOUSE/PARTNER FROM CURRENT MAIN JOB

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

#1 refers to current job pension of head

#2 refers to current job pension of spouse/partner

-----------------------------------------------------------------------------

#1a refers to first current job pension of head

#1b refers to second current job pension of head

#1c refers to third current job pension of head

#1d refers to all remaining current job pensions of head

#2a refers to first current job pension of spouse/partner

#2b refers to second current job pension of spouse/partner

#2c refers to third current job pension of spouse/partner

#2d refers to all remaining current job pensions of spouse/partner

-----------------------------------------------------------------------------

GF

X4135(#1) IN PERSON VERSION:

X4735(#2) (SHOW CARD 10)

NOT SELF-EMPLOYED:

(Are you/Is [he/she]) included in any

pension, retirement, or tax-deferred savings plans

connected with the job you just told me about? Please do

not include any assets I have already recorded.

DO NOT INCLUDE SOCIAL SECURITY OR PLANS CONNECTED ONLY WITH

EARLIER JOBS. THESE ARE RECORDED LATER IN THE INTERVIEW.

INTERVIEWER: IF R MENTIONS IRA (OTHER THAN SEP IRA OR

SIMPLE IRA) OR KEOGH PLANS, MAKE A NOTE AND SAY: "We

covered those earlier in the interview. Here, I just want

to find out about other plans operated through your

(husband/wife/partner)'s employer."

SELF-EMPLOYED: Aside from IRA or KEOGH plans, (are you/is

[he/she]) included in any pension plans or tax-deferred

savings plans through (your/his/her) work/the business?

INCLUDE PLANS THROUGH A UNION.

TELEPHONE VERSION:

NOT SELF-EMPLOYED:

(Are you/Is [he/she]) included in any

pension, retirement, or tax-deferred savings plans

connected with the job you just told me about? Please do

not include any assets I have already recorded.

DO NOT INCLUDE SOCIAL SECURITY OR PLANS CONNECTED ONLY WITH

EARLIER JOBS. THESE ARE RECORDED LATER IN THE INTERVIEW.

INTERVIEWER: IF R MENTIONS IRA (OTHER THAN SEP IRA OR

SIMPLE IRA) OR KEOGH PLANS, MAKE A NOTE AND SAY: "We

covered those earlier in the interview. Here, I just want

to find out about other plans operated through your

(husband/wife/partner)'s employer."

SELF-EMPLOYED: Aside from IRA or KEOGH plans, (are you/is

[he/she]) included in any pension plans or tax-deferred

savings plans through (your/his/her) work/the business?

INCLUDE PLANS THROUGH A UNION.

1. \*YES

5. \*NO

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse)

X4136(#1) Does (your/her/his) employer offer any such plans?

X4736(#2)

1. \*YES

5. \*NO

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; self-employed: X4106=2 or 3/X4706=2 or 3;

included in pension plan on main job: X4135=1/X4735=1)

X4137(#1) (Are you/Is [he/she]) eligible to be included in any of

X4737(#2) these plans?

1. \*YES

5. \*NO

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; self-employed: X4106=2 or 3/X4706=2 or 3;

included in pension plan on main job: X4135=1/X4735=1;

no such plans: X4136^=1/X4736^=1)

What kinds of plans are these?

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN

X6708(#1) \*Thrift or savings

X6713(#2)

X6709(#1) \*401(K)/403(B)/SRA/457

X6714(#2)

X6710(#1) \*Profit sharing

X6715(#2)

X6711(#1) \*Tax-deferred Annuity

X6716(#2)

X6712(#1) \*Other

X6717(#2)

1. Checked (only for X6708-X6711/X6713-X6716)

5. Not checked

Responses 7-17 valid only for X6712/X6717

7. Stock purchase/ESOP (Employee Stock Option Plan)

8. Deferred compensation plan, n.e.c

9. IRA-SEP (not to be confused with a regular IRA)

10. Defined-contribution plan; TIAA-CREF (Teachers

Insurance and Annuity Association/College Retirement

Equity Fund)

11. Money purchase plan

13. Other salary reduction plan; deferred compensation plan

14. Other state/local government plan; PERS (public employees

retirement system)

15. Other federal government plan

16. Other type of account

17. Other type of annuity/defined benefit plan

28. "Cash balance" plan

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; self-employed: X4106=2 or 3/X4706=2 or 3;

no such plans: X4136=5/X4736=5; not eligible for

plan: X4137=5/X4737=5)

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FOR THE PUBLIC DATA SET, CODE 15 IS COMBINED WITH

CODE 14 (X6712/X6717 ONLY); CODE 28 IS COMBINED WITH

CODE 16 (X6712/X6717 ONLY)

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X4138(#1) Will (you/[he/she]) be eligible if (you/[he/she]) continue(s)

X4738(#2) to work for this employer?

1. \*YES

5. \*NO

-7. DEPENDS

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; self-employed: X4106=2 or 3/X4706=2 or 3;

included in pension plan on main job: X4135=1/X4735=1;

no such plans: X4136^=1/X4736^=1; eligible to be

included: X4137=1/X4737=1)

X6751(#1) Code reason DEPENDS

X6761(#2)

10. If change to full-time; change employment status/hour/grade

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; self-employed: X4106=2 or 3/X4706=2 or 3;

included in pension plan on main job: X4135=1/X4735=1;

no such plans: X4136^=1/X4736^=1; eligible to be

included: X4137=1/X4737=1; answer to future

eligibility question not DEPENDS: X4138^=-7/X4738^=-7)

X4139(#1) In how many different plans of this sort (are you/is

X4739(#2) [he/she]) included on this job?

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; no pensions: X4135^=1/X4735^=1)

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FOR THE PUBLIC DATA SET, TOP-CODED AT 5

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X4140(#1) (Are you/Is [he/she]) currently receiving retirement

X4740(#2) payments from any pension plans from this job?

1. \*YES

5. \*NO

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; no pensions: X4135^=1/X4735^=1)

X4141(#1) I'll ask you about the payments later. Are there any

X4741(#2) retirement or savings plans from this job where (you

are/[he/she] is) not yet drawing benefit payments?

1. \*YES

5. \*NO

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; no pensions: X4135^=1/X4735^=1; not

currently receiving benefits from this job:

X4140^=1/X4740^=1)

X6698(#1) Originally reported value of X4201 (see introduction)

X6699(#2) Originally reported value of X4801 (see introduction)

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FOR THE PUBLIC DATA SET, TOP-CODED AT 5

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X4201(#1) How many such plans (do you/does your [spouse/partner]) have?

X4801(#2)

Code number of plans

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; no pensions: X4135^=1/X4735^=1; no plans

where not currently drawing benefits: X4141^=1/X4741^=1)

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FOR THE PUBLIC DATA SET, TOP-CODED AT 5

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GF

X11000(#1a) There are two general types of pension plans.

X11100(#1b)

X11200(#1c) In one type, a worker is entitled to receive regular

X11300(#2a) retirement payments for as long as the worker lives, which

X11400(#2b) are most often determined by a formula as a percentage of

X11500(#2c) final or average pay.

In the other type of plan, money accumulates in an account

designated for a worker, and that money may be paid out in

a variety of ways depending on the plan or the worker's

choice.

Some plans may be like both of these types.

Which type of plan is ([yours/his/hers]/the most important

of [your/his/her] pension plans)? (Is it the type that

gives regular retirement payments, is it the type that

accumulates an account balance, or is it like both?)

IF R/SPOUSE HAS MULTIPLE PLANS OF DIFFERENT TYPES, RECORD THEM AS

SEPARATE PLANS RATHER THAN COMBINING THEM HERE AS "BOTH."

1. \*REGULAR RETIREMENT PAYMENTS

2. \*ACCOUNT

3. \*BOTH

4. \*DEFINED-BENEFIT ANNUITY PLAN

5. \*401(K) PLAN

6. \*THRIFT/SAVINGS PLAN

7. \*PROFIT-SHARING PLAN

10. \*SUPPLEMENTAL RETIREMENT ANNUITY

21. \*SEP (Simplified Employee Pension)/SIMPLE (Simplified

Incentive Match Plan For Employers)

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; no pensions: X4135^=1/X4735^=1; no plans

where not currently drawing benefits: X4141^=1/X4741^=1

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions: X4201<3/X4801<3)

GF

X11001(#1a) IF REGULAR RETIREMENT PAYMENTS: Tell me more about this

X11101(#1b) plan. (What does (your/his/her) employer call it?)

X11201(#1c)

X11301(#2a) IF ACCOUNT: Is it a 401(k) or 403(b) account, a

X11401(#2b) profit sharing plan, a supplemental retirement annuity, a

X11501(#2c) thrift/savings plan, a "cash balance" plan, an SEP, or

something else? (What does (your/his/her) employer call it?)

IF BOTH: Is this a supplemental retirement annuity, a

"cash balance" plan, a plan with a "portable cash option,"

or something else? (What does (your/his/her) employer call it?)

IF INITIAL ANSWER DK/REF: What does (your/his/her)

employer call it?

1. \*DEFINED-BENEFIT ANNUITY PLAN

2. \*401(K)

3. \*403(B)

4. \*THRIFT/SAVINGS PLAN

5. \*PROFIT SHARING PLAN

6. \*SUPPLEMENTAL RETIREMENT ANNUITY

7. \*"CASH BALANCE" PLAN

8. \*PORTABLE CASH OPTION" PLAN

20. Deferred compensation plan, n.e.c.

21. \*SEP (Simplified Employee Pension)/SIMPLE (Simplified

Incentive Match Plan For Employers)

22. Money purchase plan

25. Stock purchase plan; ESOP

26. 457 plan

30. Plan originally reported as DEFINED-BENEFIT ANNUITY

for which the R later reported that at least one

option at retirement is a lump sum settlement

(account balance at X11032 etc. either moved from a

lump sum reported at X11023 etc. or imputed; at

X11047, the employer is assumed to contribute and the

amount of the contribution is imputed)

-7. \*SOMETHING ELSE

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; no pensions: X4135^=1/X4735^=1; no plans

where not currently drawing benefits: X4141^=1/X4741^=1

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions: X4101<3/X4801<3;

type of plan defined-benefit annuity, 401(k), thrift/saving,

profit-sharing, supplemental retirement annuity:

X11000/X11100/X11200/X11300/X11400/X1500 in (4 5 6 7 10))

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FOR THE PUBLIC DATA SET, CODES 3, 4, AND 26 ARE

COMBINED WITH CODE 2

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

How long (have you/has your[husband/wife/partner]) been in

this plan?

CODE ZERO FOR CURRENT YEAR.

X11002(#1a) Code number of years

X11102(#1b) -1. Less than a year

X11202(#1c) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

X11302(#2a) no spouse; no pensions: X4135^=1/X4735^=1; no plans where

X11402(#2b) not currently drawing benefits: X4141^=1/X4741^=1;

X11502(#2c) no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions: X4201<3/X4801<3)

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FOR THE PUBLIC DATA SET, TOP-CODED AT 50

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X11003(#1a) Code age

X11103(#1b) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

X11203(#1c) no spouse;

X11303(#2a) no pensions: X4135^=1/X4735^=1; no plans where not

X11403(#2b) currently drawing benefits: X4141^=1/X4741^=1;

X11503(#2c) no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions: X4201<3/X4801<3)

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FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT CURRENT AGE-50

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X11004(#1a) Code year (4 digits)

X11104(#1b) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

X11204(#1c) no spouse;

X11304(#2a) no pensions: X4135^=1/X4735^=1; no plans where not

X11404(#2b) currently drawing benefits: X4141^=1/X4741^=1;

X11504(#2c) no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions: X4201<3/X4801<3)

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FOR THE PUBLIC DATA SET, BOTTOM-CODED

AT X8095-50

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At what age (do you/does [he/she]) expect to receive or

start receiving any money from this plan?

X11005(#1a) Code age

X11105(#1b) -2. \*DOES NOT EXPECT ANY MONEY FROM THIS PLAN

X11205(#1c) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

X11305(#2a) no spouse;

X11405(#2b) no pensions: X4135^=1/X4735^=1; no plans where not

X11505(#2c) currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions: X4201<3/X4801<3)

X11006(#1a) Code number of years

X11106(#1b) -2. \*DOES NOT EXPECT ANY MONEY FROM THIS PLAN

X11206(#1c) -1. Less than a year

X11306(#2a) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

X11406(#2b) no spouse;

X11506(#2c) no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions: X4201<3/X4801<3)

X11007(#1a) Code year (4 digits)

X11107(#1b) -2. \*DOES NOT EXPECT ANY MONEY FROM THIS PLAN

X11207(#1c) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

X11307(#2a) no spouse;

X11407(#2b) no pensions: X4135^=1/X4735^=1; no plans where not

X11507(#2c) currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions: X4201<3/X4801<3)

X11008(#1a) (Do you/Does [he/she]) have a choice about how

X11108(#1b) (you/[he/she]) will receive benefits?

X11208(#1c)

X11308(#2a) 1. \*YES

X11408(#2b) 5. \*NO

X11508(#2c) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

does not expect benefits: X11005/X11105/X11205/X11305/

X11405/X11505=-2)

#1a: X11009 X11010 X11011 X11012

#1b: X11109 X11110 X11111 X11112

#1c: X11209 X11210 X11211 X11212

#2a: X11309 X11310 X11311 X11312

#2b: X11409 X11410 X11411 X11412

#2c: X11509 X11510 X11511 X11512

What are the choices: a lump sum distribution or

settlement to keep or roll over, regular payments for as

long as (you live/[he/she] lives), a payment level that

(you decide/[he/she] decides), or something else?

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN

1. \*LUMP SUM/roll-over/leave with employer

2. \*REGULAR PAYMENTS AS LONG AS LIVE/annuity

3. \*PAYMENT LEVEL YOU DECIDE

-7. \*SOMETHING ELSE

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

does not expect benefits: X11005/X11105/X11205/X11305/

X11405/X11505=-2; no choice of benefits:

X11008/X11108/X11208/X11308/X11408/X11508=5)

X11013(#1a) IF CHOICE OF BENEFITS: What sort of benefit will

X11113(#1b) (you/[he/she]) choose to receive?

X11213(#1c)

X11313(#2a) IF NO CHOICE OF BENEFITS: What sort of benefit (do you/

X11413(#2b) does [he/she]) expect to receive (-a lump sum distribution

X11513(#2c) or settlement to keep or roll-over, regular payments for

as long as (you live/[he/she] lives), a payment level that

(you decide/[he/she] decides), or something else)?

1. \*LUMP SUM/roll-over

2. \*REGULAR PAYMENTS AS LONG AS LIVE/annuity

3. \*PAYMENT LEVEL YOU DECIDE

-7. \*SOMETHING ELSE

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

does not expect benefits: X11005/X11105/X11205/X11305/

X11405/X11505=-2; only one benefit chosen:

X11010=0/X11110=0/X11210=0/X11310=0/X11410=0/X11510=0)

X11014(#1a) How much (do you/does [he/she]) expect?

X11114(#1b)

X11214(#1c) 1. \*ENTER PERCENT OF FINAL PAY

X11314(#2a) 2. \*ENTER LUMP SUM/roll-over

X11414(#2b) 3. \*ENTER REGULAR PAYMENT/payment you decide

X11514(#2c) 4. \*SOMETHING ELSE

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

does not expect benefits: X11005/X11105/X11205/X11305/

X11405/X11505=-2)

X11015(#1a) Code amount

X11115(#1b) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

X11215(#1c) no spouse;

X11315(#2a) no pensions: X4135^=1/X4735^=1; no plans where not

X11415(#2b) currently drawing benefits: X4141^=1/X4741^=1;

X11515(#2c) no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions: X4201<3/X4801<3;

does not expect benefits: X11005=-2/X11105=-2/X11205=-2/

X11305=-2/X11405=-2/X11505=-2;

percent benefit figure given: X11014=1/X11114=1/

X11214=1/X11314=1/X11414=1/X11514=1)

X11016(#1a) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X11116(#1b) (And how often would (you/[he/she]) expect to receive that amount?)

X11216(#1c)

X11316(#2a) Code frequency

X11416(#2b) 1. Day

X11516(#2c) 2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year; every six months

12. Every two months

14. By the job/piece

18. Hour

22. Varies

31. \*Twice a month

-7. \*Other

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions: X4201<3/X4801<3;

does not expect benefits: X11005=-2/X11105=-2/X11205=-2/

X11305=-2/X11405=-2/X11505=-2;

percent benefit figure given: X11014=1/X11114=1/

X11214=1/X11314=1/X11414=1/X11514=1; lump sum given:

X11014=2/X11114=2/X11214=2/X11314=2/X11414=2/X11514=2)

X11017(#1a) Code percent \* 100

X11117(#1b) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

X11217(#1c) no spouse;

X11317(#2a) no pensions: X4135^=1/X4735^=1; no plans where not

X11417(#2b) currently drawing benefits: X4141^=1/X4741^=1;

X11517(#2c) no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions: X4201<3/X4801<3;

does not expect benefits: X11005=-2/X11105=-2/X11205=-2/

X11305=-2/X11405=-2/X1505=-2; regular payment given:

X11014=3/X11114=3/X11214=3/X11314=3/X11414=3/X11514=3;

lump sum given; X11014=2/X11114=2/X11214=2/X11314=2/X11414=2/

X11514=2)

1a: X11018 X11019 X11020 X11021

1b: X11118 X11119 X11120 X11121

1c: X11218 X11219 X11220 X11221

2a: X11318 X11319 X11320 X11321

2b: X11418 X11419 X11420 X11421

2c: X11518 X11519 X11520 X11521

If (you/[he/she]) left this job now, what would (you/your

[husband/wife/partner]) be eligible to receive from this

plan-a lump sum distribution or settlement to keep or

roll over, would (you/[he/she]) receive regular payments

now or later, would (you/[he/she]) get something else, or

would (you/[he/she]) not be eligible to get anything?

INTERVIEWER INSTRUCTION: WE DO NOT CARE IF PENALTIES APPLY HERE.

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN

1. \*LUMP SUM/roll-over

2. \*PAYMENTS NOW

3. \*PAYMENTS LATER

-7. \*SOMETHING ELSE

-1. \*NOTHING

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3)

X11022(#1a) Which one would (you/[he/she]) choose?

X11122(#1b)

X11222(#1c) 1. \*LUMP SUM/roll-over

X11322(#2a) 2. \*PAYMENTS NOW

X11422(#2b) 3. \*PAYMENTS LATER

X11522(#2c) -7. \*SOMETHING ELSE

-1. \*NOTHING

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

only one option to receive benefits:

X11019=0/X11119=0/X11219=0/X11319=0/X11419=0/X11519=0;

not eligible to get anything:

X11018=-1/X11118=-1/X11218=-1/X11318=-1/X11418=-1/

X11518=-1)

How much would (you/[he/she]) get?

X11023(#1a) Code amount

X11123(#1b) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

X11223(#1c) no spouse;

X11323(#2a) no pensions: X4135^=1/X4735^=1; no plans where not

X11423(#2b) currently drawing benefits: X4141^=1/X4741^=1;

X11523(#2c) no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

not eligible to get anything:

X11018=-1/X11118=-1/X11218=-1/X11318=-1/X11418=-1/

X11518=-1)

NOTE: the amount of a lump sum settlement is assumed to be

net of any outstanding loans

X11024(#1a) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X11124(#1b) (And how often would (you/[he/she]) expect to receive that amount?)

X11224(#1c)

X11324(#2a) Code frequency

X11424(#2b) 1. Day

X11524(#2c) 2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year; every six months

12. Every two months

14. By the job/piece

18. Hour

22. Varies

31. \*Twice a month

-7. \*Other

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

not eligible to get anything:

X11018=-1/X11118=-1/X11218=-1/X11318=-1/X11418=-1/

X11518=-1;

X11025(#1a) (Are you/Is [he/she]) allowed to borrow against

X11125(#1b) (your/his/her) holdings in this plan?

X11225(#1c)

X11325(#2a) 1. \*YES

X11425(#2b) 5. \*NO

X11525(#2c) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions: X4201<3/X4801<3)

X11026(#1a) (Do you/Does your [he/she]) currently have a loan against

X11126(#1b) the plan?

X11226(#1c)

X11326(#2a) 1. \*YES

X11426(#2b) 5. \*NO

X11526(#2c) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions: X4201<3/X4801<3;

borrowing not allowed:

X11025^=1/X11125^=1/X11225^=1/X11325^=1/X11425^=1/

X11525^=1)

GF

X11070(#1a) Did I record this loan earlier in the interview?

X11170(#1b)

X11270(#1c) 1. YES

X11370(#2a) 5. NO

X11470(#2b) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

X11570(#2c) no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions: X4201<3/X4801<3;

borrowing not allowed:

X11025^=1/X11125^=1/X11225^=1/X11325^=1/X11425^=1/

X11525^=1;

no loan against plan:

X11026^=1/X11126^=1/X11226^=1/X11326^=1/X11426^=1/X11526^=1)

NOTE: where (X11070 X11170 X11270 X11370 X11470 X11570)=1,

the amount of the loan is not edited out of the

earlier location.

GF

X11071(#1a) Where did you tell me about this loan?

X11171(#1b)

X11271(#1c) 1. \*Credit card or store debt

X11371(#2a) 2. \*Mortgage debt

X11471(#2b) 3. \*Home equity loan

X11571(#2c) 4. \*Other home purchase loan

5. \*Home improvement loan

6. \*Loan for other real estate

7. \*Line of credit

8. \*Business loan

9. \*Vehicle loan

10. \*Education Loan

11. \*Other installment loan

12. \*Margin loan

13. \*Insurance loan

14. \*Pension loan

25. Other installment loan #1

26. Other installment loan #2

27. Other installment loan #3

28. Other installment loan #4

29. Other installment loan #5

30. Other installment loan #6

-7. \*Other

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions: X4201<3/X4801<3;

borrowing not allowed:

X11025^=1/X11125^=1/X11225^=1/X11325^=1/X11425^=1/

X11525^=1;

no loan against plan:

X11026^=1/X11126^=1/X11226^=1/X11326^=1/X11426^=1/X11526^=1;

did not report loan earlier:

X11070^=1/X11170^=1/X11270^=1/X11370^=1/X11470^=1/X11570^=1)

X11027(#1a) What is the current loan balance?

X11127(#1b)

X11227(#1c) Code amount

X11327(#2a) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

X11427(#2b) no spouse;

X11527(#2c) no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions: X4201<3/X4801<3;

borrowing not allowed:

X11025^=1/X11125^=1/X11225^=1/X11325^=1/X11425^=1/

X11525^=1;

no loan against plan:

X11026^=1/X11126^=1/X11226^=1/X11326^=1/X11426^=1/X11526^=1)

X11028(#1a) How much are the payments?

X11128(#1b)

X11228(#1c) Code amount

X11328(#2a) -1. NOTHING

X11428(#2b) -2. NO TYPICAL PAYMENTS

X11528(#2c) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions: X4201<3/X4801<3;

borrowing not allowed:

X11025^=1/X11125^=1/X11225^=1/X11325^=1/X11425^=1/

X11525^=1;

no loan against plan:

X11026^=1/X11126^=1/X11226^=1/X11326^=1/X11426^=1/X11526^=1)

X11029(#1a) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X11129(#1b) (And how often do you/does [he/she] pay that amount?)

X11229(#1c)

X11329(#2a) Code frequency

X11429(#2b) 1. Day

X11529(#2c) 2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year; every six months

12. Every two months

14. By the job/piece

18. Hour

22. Varies

31. \*Twice a month

-1. Nothing

-2. No regular payment

-7. \*Other

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions: X4201<3/X4801<3;

borrowing not allowed:

X11025^=1/X11125^=1/X11225^=1/X11325^=1/X11425^=1/

X11525^=1;

no loan against plan:

X11026^=1/X11126^=1/X11226^=1/X11326^=1/X11426^=1/X11526^=1)

X11030(#1a) For what purpose did (you/[he/she]) borrow this money?

X11130(#1b)

X11230(#1c) See MASTER LOAN PURPOSE LIST at X6723

X11330(#2a) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

X11430(#2b) no spouse;

X11530(#2c) no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions: X4201<3/X4801<3;

borrowing not allowed:

X11025^=1/X11125^=1/X11225^=1/X11325^=1/X11425^=1/

X11525^=1;

no loan against plan:

X11026^=1/X11126^=1/X11226^=1/X11326^=1/X11426^=1/X11526^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

SEE MASTER LOAN PURPOSE LIST FOR INFORMATION ON CODE

COLLAPSING FOR LOAN PURPOSE VARIABLES FOR PUBLIC

DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X11031(#1a) If (you/[he/she]) needed money in an emergency, could

X11131(#1b) (you/[he/she]) withdraw funds, even though there may

X11231(#1c) be a penalty for doing so?

X11331(#2a)

X11431(#2b) 1. \*YES

X11531(#2c) 5. \*NO

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3)

GF

X11072(#1a) Is there any type of account balance associated with this

X11172(#1b) plan?

X11272(#1c)

X11372(#2a) 1. \*YES

X11472(#2b) 5. \*NO

X11572(#2c) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; no pensions: X4135^=1/X4735^=1; borrowing

not allowed nor withdrawing in emeregncy: X11025^=1

and X11031 ^=1/X11125^=1 and X11131 ^=1/X11225^=1 and

X11231 ^=1/X11325^=1 and X11331^=1/X11425^=1 and

X11431^=1/X11525^=1 and X11531 ^=1; not a

defined-benefit annuity: X11000^=4 and X11001^=1/

X11100^=4 and X11101^=1/X11200^=4 and X11201^=1/

X11300^=4 and X11301^=1/X11400^=4 and X11401^=1/

X11500^=4 and X11501^=1/; no pensions: X4201<1/

X4801<1/fewer than 2 pensions: X4201<2/X4801<2/

fewer than 3 pensions:X4201<3/X4801<3)

X11032(#1a) What is the balance of (your/[his/her]) pension account now?

X11132(#1b)

X11232(#1c) Code amount

X11332(#2a) -1. Nothing

X11432(#2b) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

X11532(#2c) no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

plan is defined-benefit annuity:

X11000=4 or X11001=1/X11100=4 or X11101=1/X11200=4 or

X11201=1/X11300=4 or X11301=1/X11400=4 or X11401=1/

X11500=4 or X11501=1)

X11033(#1a) Is this amount net of the loan you told me about?

X11133(#1b)

X11233(#1c) 1. \*YES

X11333(#2a) 3. R originally gave net value, but edited to gross

X11433(#2b) 5. \*NO

X11533(#2c) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

plan is defined-benefit annuity:

X11000=4 or X11001=1/X11100=4 or X11101=1/X11200=4 or

X11201=1/X11300=4 or X11301=1/X11400=4 or X11401=1/

X11500=4 or X11501=1;

no loan against plan:

X11026^=1/X11126^=1/X11226^=1/X11326^=1/X11426^=1/

X11526^=1)

X11034(#1a) (Do you/Does [he/she]) have any choices about how the

X11134(#1b) funding for this plan is invested?

X11234(#1c)

X11334(#2a) INTERVIEWER: IF R SAYS HE/SHE CAN DECIDE ONLY PART OF THE

X11434(#2b) INVESTMENT, CODE "LIMITED CHOICE."

X11534(#2c)

1. \*YES

3. \*LIMITED CHOICE

5. \*NO

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3)

X11035(#1a) (Do you/Does [he/she]) know how it is invested?

X11135(#1b)

X11235(#1c) 1. \*YES

X11335(#2a) 5. \*NO

X11435(#2b) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

X11535(#2c) no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

has choice on how funds invested: X11034^=5/X11134^=5/

X11234^=5/X11334^=5/X11434^=5/X11534^=5)

GF

X11036(#1a) How is it invested? Is it all in stocks, all in

X11136(#1b) interest-earning assets, is it split between these, or

X11236(#1c) something else?

X11336(#2a)

X11436(#2b) IF R SAY "MUTUAL FUND," PROBE FOR WHETHER IT IS A STOCK

X11536(#2c) FUND, A BOND FUND, OR ONE SPLIT OVER BOTH TYPES

1. \*ALL IN STOCKS

2. \*ALL IN INTEREST EARNING ASSETS/BONDS

3. \*SPLIT

4. Real estate

5. Hedge fund

6. Annuities

8. Mineral rights

-7. \*OTHER

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

how invested unknown: X11035=5/X11135=5/X11235=5/

X11335=5/X11435=5/X11535=5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODES 4, 5, 6, 7 AND 8 ARE

COMBINED WITH CODE -7

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X11037(#1a) About what percent of it is in stocks?

X11137(#1b)

X11237(#1c) Code percent \* 100

X11337(#2a) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

X11437(#2b) no spouse;

X11537(#2c) no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

investment unknown: X11035=5/X11135=5/X11235=5/X11335=5/

X11435=5/X11535=5; holdings not split: X11036^=3/

X11136^=3/X11236^=3/X11336^=3/X11436^=3/X11536^=3)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, ROUNDED TO NEAREST 500 IF

BETWEEN 250 AND 9750 INCLUSIVE, OTHERWISE IF > 0

ROUNDED TO NEAREST 100 WITH A TOP-CODE AT 9900

AND A BOTTOM-CODE AT 100 FOR THOSE VALUES ROUNDED

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X11038(#1a) Is any of this stock in the company where (you work/[he/she]

X11138(#1b) works)?

X11238(#1c)

X11338(#2a) 1. \*YES

X11438(#2b) 5. \*NO

X11538(#2c) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

investment unknown: X11035=5/X11135=5/X11235=5/X11335=5/

X11435=5/X11535=5; no holdings in stocks: X11036^=(1,3)/

X11136^=(1,3)/X11236^=(1,3)/X11336^=(1,3)/X11436^=(1,3)/

X11536^=(1,3))

X11039(#1a) About what percent of this stock is in company stock?

X11139(#1b)

X11239(#1c) Code percent \* 100

X11339(#2a) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

X11439(#2b) no spouse;

X11539(#2c) no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

investment unknown: X11035=5/X11135=5/X11235=5/X11335=5/

X11435=5/X11535=5; no holdings in stocks: X11036^=(1,3)/

X11136^=(1,3)/X11236^=(1,3)/X11336^=(1,3)/X11436^=(1,3)/

X11536^=(1,3); no holdings in company stock: X11038=5/

X11138=5/X11238=5/X11338=5/X11438=5/X11538=5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, ROUNDED TO NEAREST 500 IF

BETWEEN 250 AND 9750 INCLUSIVE, OTHERWISE IF > 0 AND

< 10000 ROUNDED TO NEAREST 100 WITH A TOP-CODE AT 9900

AND A BOTTOM-CODE AT 100 FOR THOSE VALUES ROUNDED

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X11040(#1a) (Do you/Does [he/she]) make contributions to this plan?

X11140(#1b)

X11240(#1c) IF R ASKS: Include contributions through salary deduction,

X11340(#2a) union dues, and direct contributions.

X11440(#2b)

X11540(#2c)

1. \*YES

3. \*YES, BUT NOT CURRENTLY

5. \*NO

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3)

What percent of your pay or what amount (do you/does [he/she])

contribute currently per pay period or per year?

(Please do not include payments on the loan.)

INTERVIEWER: WE DO NOT WANT (RESPONDENT'S/SPOUSE'S/

PARTNER'S) SHARE OF THE TOTAL CONTRIBUTION

X11041(#1a) Code percent \* 100

X11141(#1b) -1. Nothing

X11241(#1c) -2. Cannot convert amount to percent (negative or zero

X11341(#2a) income, or wage/contribution is zero or frequency is

X11441(#2b) lump sum, variable or by the job)

X11541(#2c) -5. \*VARIES

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

R/SP not making contributions currently: X11040^=1/

X11140^=1/X11240^=1/X11340^=1/X11440^=1/X11540^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, ROUNDED TO NEAREST 100

WITH A BOTTOM-CODE AT 100

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X11042(#1a) Code amount

X11142(#1a) -1. Nothing

X11242(#1c) -2. Cannot convert percent to amount (negative or zero

X11342(#2a) income, or wage/contribution is zero or frequency is

X11442(#2b) lump sum, variable or by the job)

X11542(#2c) -5. \*VARIES

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

R/SP not making contributions currently: X11040^=1/

X11140^=1/X11240^=1/X11340^=1/X11440^=1/X11540^=1)

X11043(#1a) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X11143(#1b) (And how often did (you/[he/she]) contribute that amount?)

X11243(#1c)

X11343(#2a) Code frequency

X11443(#2b) 1. Day

X11543(#2c) 2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year; every six months

12. Every two months

14. By the job/piece

18. Hour

22. Varies

31. \*Twice a month

-1. Nothing

-2. Cannot convert amount to percent or percent to amount

(negative or zero income, or wage/contribution

is zero or frequency is lump sum, variable or by the job)

-5. Varies

-7. \*Other

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

R/SP not making contributions currently: X11040^=1/

X11140^=1/X11240^=1/X11340^=1/X11440^=1/X11540^=1)

What percent of (your/[his/her]) pay or what amount did

(you/[he/she]) contribute per pay period last year?

X11044(#1a) Code percent \* 100

X11144(#1b) -1. Nothing

X11244(#1c) -2. Cannot convert amount to percent (negative or zero

X11344(#2a) income, or wage/contribution is zero or frequency is

X11444(#2b) lump sum, variable or by the job)

X11544(#2c) -5. Varies

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

R/SP not making contributions: X11040=5/

X11140=5/X11240=5/X11340=5/X11440=5/X11540=5;

R/SP contributing currently: X11040=1/X11140=1/

X11240=1/X11340=1/X11440=1/X11540=1;

amount of current contribution does not vary

and is greater than zer0: X11042>0/X11142>0/X11242>0/

X11342>0/X11442>0/X11542>0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, ROUNDED TO NEAREST 100

WITH A BOTTOM-CODE AT 100

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X11045(#1a) Code amount

X11145(#1a) -1. Nothing

X11245(#1c) -2. Cannot convert percent to amount (negative or zero

X11345(#2a) income, or wage/contribution is zero or frequency is

X11445(#2b) lump sum, variable or by the job)

X11545(#2c) -5. Varies

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

R/SP not making contributions: X11040=5/

X11140=5/X11240=5/X11340=5/X11440=5/X11540=5;

R/SP contributing currently: X11040=1/X11140=1/

X11241=0/X11340=1/X11440=1/X11540=1;

amount of current contribution does not vary

and is greater than zer0: X11042>0/X11142>0/X11242>0/

X11342>0/X11442>0/X11542>0)

X11046(#1a) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X11146(#1b) (And how often did (you/[he/she]) contribute that amount?)

X11246(#1c)

X11346(#2a) Code frequency

X11446(#2b) 1. Day

X11546(#2c) 2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year; every six months

12. Every two months

14. By the job/piece

18. Hour

22. Varies

31. \*Twice a month

-1. Nothing

-2. Cannot convert amount to percent or percent to amount

(negative or zero income, or wage/contribution

is zero or frequency is lump sum, variable or by the job)

-5. Varies

-7. \*Other

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

R/SP not making contributions: X11040=5/

X11140=5/X11240=5/X11340=5/X11440=5/X11540=5;

R/SP contributing currently: X11040=1/X11140=1/

X11240=1/X11340=1/X11440=1/X11540=1;

amount of current contribution does not vary

and is greater than zer0: X11042>0/X11142>0/X11242>0/

X11342>0/X11442>0/X11542>0)

X11047(#1a) Does ([your/his/her] employer/the business) make

X11147(#1b) contributions to this plan?

X11247(#1c)

X11347(#2a) 1. \*YES

X11447(#2b) 3. \*YES, BUT NOT CURRENTLY

X11547(#2c) 5. \*NO

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

plan is defined-benefit annuity:

X11000=4 or X11001=1/X11100=4 or X11101=1/X11200=4 or

X11201=1/X11300=4 or X11301=1/X11400=4 or X11401=1/

X11500=4 or X11501=1)

X11048(#1a) How much does ([your/his/her] employer/the business)

X11148(#1b) contribute-(as a percent match of (your/his/her)

X11248(#1c) contribution, as a percent of (your/his/her) pay, or as

X11348(#2a) some amount per pay period or per year)?

X11448(#2b)

X11548(#2c) 1.\*PERCENT MATCH RATE

2.\*PERCENT OF PAY

3.\*AMOUNT

-1.\*NOTHING

-5.\*VARIES

-7.\*OTHER

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

employer not making contributions currently: X11047^=1/

X11147^=1/X11247^=1/X11347^=1/X11447^=1/X11547^=1;

plan is defined-benefit annuity:

X11000=4 or X11001=1/X11100=4 or X11101=1/X11200=4 or

X11201=1/X11300=4 or X11301=1/X11400=4 or X11401=1/

X11500=4 or X11501=1)

X11049(#1a) Code percent of pay \* 100

X11149(#1b) -1. Nothing

X11249(#1c) -2. Cannot convert amount to percent (negative or zero

X11349(#2a) income, or wage/contribution is zero or frequency is

X11449(#2b) lump sum, variable or by the job)

X11549(#2c) -5. \*VARIES

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

employer not making contributions currently: X11047^=1/

X11147^=1/X11247^=1/X11347^=1/X11447^=1/X11547^=1;

employer contributes nothing or they vary:

X11048^=(1,2,3)/X11148^=(1,2,3)/X11248^=(1,2,3)/

X11348^=(1,2,3)/X11448^=(1,2,3)/X11548^=(1,2,3);

plan is defined-benefit annuity:

X11000=4 or X11001=1/X11100=4 or X11101=1/X11200=4 or

X11201=1/X11300=4 or X11301=1/X11400=4 or X11401=1/

X11500=4 or X11501=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, ROUNDED TO NEAREST 100

WITH A BOTTOM-CODE AT 100

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X11050(#1a) Code percent match rate \* 100

X11150(#1b) -1. Nothing

X11250(#1c) -2. Cannot convert amount to percent (negative or zero

X11350(#2a) income, or wage/contribution is zero or frequency is

X11450(#2b) lump sum, variable or by the job)

X11550(#2c) -5. \*VARIES

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

employer not making contributions currently: X11047^=1/

X11147^=1/X11247^=1/X11347^=1/X11447^=1/X11547^=1;

employer contributes nothing or they vary:

X11048^=(1,2,3)/X11148^=(1,2,3)/X11248^=(1,2,3)/

X11348^=(1,2,3)/X11448^=(1,2,3)/X11548^=(1,2,3);

plan is defined-benefit annuity:

X11000=4 or X11001=1/X11100=4 or X11101=1/X11200=4 or

X11201=1/X11300=4 or X11301=1/X11400=4 or X11401=1/

X11500=4 or X11501=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, ROUNDED TO NEAREST 100

WITH A BOTTOM-CODE AT 100. FOR VALUES ABOVE 10000,

ROUNDING TO 2 SIGNIFICANT DIGITS

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X11051(#1a) Code amount

X11151(#1a) -1. Nothing

X11251(#1c) -2. Cannot convert percent to amount (negative or zero

X11351(#2a) income, or wage/contribution is zero or frequency is

X11451(#2b) lump sum, variable or by the job)

X11551(#2c) -5. \*VARIES

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

employer not making contributions currently: X11047^=1/

X11147^=1/X11247^=1/X11347^=1/X11447^=1/X11547^=1;

employer contributes nothing or they vary:

X11048^=(1,2,3)/X11148^=(1,2,3)/X11248^=(1,2,3)/

X11348^=(1,2,3)/X11448^=(1,2,3)/X11548^=(1,2,3);

plan is defined-benefit annuity:

X11000=4 or X11001=1/X11100=4 or X11101=1/X11200=4 or

X11201=1/X11300=4 or X11301=1/X11400=4 or X11401=1/

X11500=4 or X11501=1)

X11052(#1a) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X11152(#1b) (And how often is this contribution made?)

X11252(#1c)

X11352(#2a) Code frequency

X11452(#2b) 1. Day

X11552(#2c) 2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year; every six months

12. Every two months

14. By the job/piece

18. Hour

22. Varies

31. \*Twice a month

-1. Nothing

-2. Cannot convert amount to percent or percent to amount

(negative or zero income, or wage/contribution

is zero or frequency is lump sum, variable or by the job)

-5. \*VARIES

-7. \*Other

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

employer not making contributions currently: X11047^=1/

X11147^=1/X11247^=1/X11347^=1/X11447^=1/X11547^=1;

employer contributes nothing or they vary:

X11048^=(1,2,3)/X11148^=(1,2,3)/X11248^=(1,2,3)/

X11348^=(1,2,3)/X11448^=(1,2,3)/X11548^=(1,2,3);

plan is defined-benefit annuity:

X11000=4 or X11001=1/X11100=4 or X11101=1/X11200=4 or

X11201=1/X11300=4 or X11301=1/X11400=4 or X11401=1/

X11500=4 or X11501=1)

X11053(#1a) How much did ([your/his/her] employer/the business)

X11153(#1b) contribute last year-(as a percent match of your

X11253(#1c) contribution, as a percent of your pay, or as some amount

X11353(#2a) per pay period or per year)?

X11453(#2b)

X11553(#2c) THE MATCH RATE IS THE FRACTION OF R'S CONTRIBUTION THAT

THE EMPLOYER CONTRIBUTES.

1.\*ENTER PERCENT MATCH RATE

2.\*ENTER PERCENT OF PAY

3.\*ENTER AMOUNT

-1.\*NOTHING

-7.\*OTHER

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

employer not making contributions: X11047=5/

X11147=5/X11247=5/X11347=5/X11447=5/X11547=5;

amount of employer contribution does not vary

and is greater than zero: X11048>0/X11148>0/X11248>0/

X11348>0/X11448>0/X11548>0;

plan is defined-benefit annuity:

X11000=4 or X11001=1/X11100=4 or X11101=1/X11200=4 or

X11201=1/X11300=4 or X11301=1/X11400=4 or X11401=1/

X11500=4 or X11501=1)

X11054(#1a) Code percent of pay \* 100

X11154(#1b) -1. Nothing

X11254(#1c) -2. Cannot convert amount to percent (negative or zero

X11354(#2a) income, or wage/contribution is zero or frequency is

X11454(#2b) lump sum, variable or by the job)

X11554(#2c) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

employer not making contributions: X11047=5/

X11147=5/X11247=5/X11347=5/X11447=5/X11547=5;

amount of employer contribution does not vary

and is greater than zero: X11048>0/X11148>0/X11248>0/

X11348>0/X11448>0/X11548>0;

plan is defined-benefit annuity:

X11000=4 or X11001=1/X11100=4 or X11101=1/X11200=4 or

X11201=1/X11300=4 or X11301=1/X11400=4 or X11401=1/

X11500=4 or X11501=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, ROUNDED TO NEAREST 100

WITH A BOTTOM-CODE AT 100

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X11055(#1a) Code percent match rate \* 100

X11155(#1b) -1. Nothing

X11255(#1c) -2. Cannot convert amount to percent (negative or zero

X11355(#2a) income, or wage/contribution is zero or frequency is

X11455(#2b) lump sum, variable or by the job)

X11555(#2c) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

employer not making contributions: X11047=5/

X11147=5/X11247=5/X11347=5/X11447=5/X11547=5;

amount of employer contribution does not vary

and is greater than zero: X11048>0/X11148>0/X11248>0/

X11348>0/X11448>0/X11548>0;

plan is defined-benefit annuity:

X11000=4 or X11001=1/X11100=4 or X11101=1/X11200=4 or

X11201=1/X11300=4 or X11301=1/X11400=4 or X11401=1/

X11500=4 or X11501=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, ROUNDED TO NEAREST 100

WITH A BOTTOM-CODE AT 100. FOR VALUES ABOVE 10000,

ROUNDING TO 2 SIGNIFICANT DIGITS

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X11056(#1a) Code amount

X11156(#1a) -1. Nothing

X11256(#1c) -2. Cannot convert percent to amount (negative or zero

X11356(#2a) income, or wage/contribution is zero or frequency is

X11456(#2b) lump sum, variable or by the job)

X11556(#2c) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

employer not making contributions: X11047=5/

X11147=5/X11247=5/X11347=5/X11447=5/X11547=5;

amount of employer contribution does not vary

and is greater than zero: X11048>0/X11148>0/X11248>0/

X11348>0/X11448>0/X11548>0;

plan is defined-benefit annuity:

X11000=4 or X11001=1/X11100=4 or X11101=1/X11200=4 or

X11201=1/X11300=4 or X11301=1/X11400=4 or X11401=1/

X11500=4 or X11501=1)

X11057(#1a) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X11157(#1b) (And how often did they contribute that amount?)

X11257(#1c)

X11357(#2a) Code frequency

X11457(#2b) 1. Day

X11557(#2c) 2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year; every six months

12. Every two months

14. By the job/piece

18. Hour

22. Varies

31. \*Twice a month

-1. Nothing

-2. Cannot convert amount to percent or percent to amount

(negative or zero income, or wage/contribution

is zero or frequency is lump sum, variable or by the job)

-7. \*Other

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

no pensions: X4201<1/X4801<1/fewer than 2 pensions:

X4201<2/X4801<2/fewer than 3 pensions:X4201<3/X4801<3;

employer not making contributions: X11047=5/

X11147=5/X11247=5/X11347=5/X11447=5/X11547=5;

amount of employer contribution does not vary

and is greater than zero: X11048>0/X11148>0/X11248>0/

X11348>0/X11448>0/X11548>0;

plan is defined-benefit annuity:

X11000=4 or X11001=1/X11100=4 or X11101=1/X11200=4 or

X11201=1/X11300=4 or X11301=1/X11400=4 or X11401=1/

X11500=4 or X11501=1)

X11259(#1d) Altogether, how much (do you/does your

X11559(#2d) [husband/wife/partner]) have in account balances for

any remaining pensions from (your/his/her) current job?

Code amount

-1. Nothing

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

fewer than 4 pensions: X4201<4/X4801<4)

X8465 (#1d) Original value of account balances for Rs who did not

X8466 (#2d) complete information within the grid structure (see

introduction).

Code amount

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse;

no pensions: X4135^=1/X4735^=1; no plans where not

currently drawing benefits: X4141^=1/X4741^=1;

fewer than 4 pensions: X4201<4/X4801<4)

Altogether, what other retirement payments or benefits (do

you/does [he/she] expect to receive from (this/these) other pension

(plan/plans) from this job?

(SPECIFY): Information reported used for purposes of editing.

X11260(#1) Are there any other pension or retirement plans that (you

X11560(#2) are/your [husband/wife/partner] is) eligible for through

(your/his/her) work, in which (you choose/[he/she] chooses)

not to participate?

1. \*YES

5. \*NO

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; no pensions: X4135^=1/X4735^=1)

GF

1: X11261 X11262 X11263

2: X11561 X11562 X11563

What kinds of plans are those?

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE

GIVEN

1. \*DEFINED-BENEFIT ANNUITY PLAN

2. \*401(K)

3. \*403(B)

4. \*PROFIT SHARING PLAN

5. \*SUPPLEMENTAL RETIREMENT ANNUITY

6. \*THRIFT/SAVING PLAN

7. \*"CASH BALANCE" PLAN

8. \*PORTABLE CASH OPTION PLAN

20. Deferred compensation plan, n.e.c.

21. \*SEP (Simplified Employee Pension)/SIMPLE (Simplified

Incentive Match Plan For Employers)

25. Stock purchase plan; ESOP

-7. \*OTHER

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

SECOND JOB OF HEAD AND SPOUSE/PARTNER

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

#1 refers to second job of head

#2 refers to second job of spouse/partner

-----------------------------------------------------------------------------

X4501(#1) Other than (your/your [husband's/wife's/partner's]) main

X5101(#2) job, (are you/is [he/she]) doing any work for pay now,

such as a second job, the military services, or (another)

business of (your/her/his) own?

1. \*YES

5. \*NO

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse)

Is this a second job, the military services, your

(husband/wife/partner)'s own business, or what? (CODE ALL THAT

APPLY)

X4502(#1) \*Second job

X5102(#2)

X4503(#1) \*Military

X5103(#2)

X4504(#1) \*Business

X5104(#2)

X4505(#1) \*Other

X5105(#2)

1. Checked (only for X4502-X4504/X5102-X5104)

5. Not checked

Other non-inap responses for X4505/X5105 only

6. Consultant

7. Director; board member

8. Hobby

9. Manage investments/real estate

10. Third (or more) job

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; no second job: X4501^=1/X5101^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, X4503/X5103 IS NOT INCLUDED

BUT COMBINED WITH "YES" RESPONSES FOR X4502/X5102;

CODES 9 AND 10 ARE COMBINED WITH "YES" RESPONSES

FOR X4504/X5104

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X4507(#1) How many hours (do you/does [he/she]) work on these jobs

X5107(#2) in a normal week?

How many hours (do you/does [he/she]) work on this job

in a normal week?

Code number

-1. None

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; no second job: X4501^=1/X5101^=1)

X4508(#1) Counting paid vacations as weeks of work, how many weeks

X5108(#2) (do you/does [he/she]) work on these jobs in a normal year?

Counting paid vacations as weeks of work, how many weeks

(do you/does [he/she]) work on this job in a normal year?

Code number

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; no second job: X4501^=1/X5101^=1)

X4509(#1) About how much (do you/does [he/she]) earn before taxes

X5109(#2) from these other jobs?

About how much (do you/does [he/she]) earn before taxes

from this other job?

Code amount

-1. Nothing

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; no second job: X4501^=1/X5101^=1)

X4510(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X5110(#2) And how often (do you/does [he/she]) receive that amount?

Code frequency

1. \*Day

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only/in total

11. \*Twice per year; every six months

12. Every two months

14. \*By the piece/job

18. Hour

22. Varies

31. \*Twice a month

-1. Nothing

-7. \*Other

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; no second job: X4501^=1/X5101^=1)

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

EMPLOYMENT HISTORY OF HEAD AND SPOUSE/PARTNER

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

#1 refers to head

#2 refers to spouse/partner

-----------------------------------------------------------------------------

X4511(#1) Thinking about all your (husband/wife/partner)'s current

X5111(#2) work for pay, (do you/does [he/she]) consider

(yourself/herself/himself) to be working full-time or

part-time?

INTERVIEWER: IF R IS LAID OFF OR A SEASONAL WORKER, ASK

ABOUT "JOBS WHEN R IS WORKING".

1. Full-time

2. Part-time

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse)

-----------------------------------------------------------------------------

CURRENTLY WORKING FULL-TIME

-----------------------------------------------------------------------------

X4512(#1) (READ SLOWLY) Now I have a few questions about your

X5112(#2) (husband/wife/partner)'s work experience. Including

any periods of self-employment, the military, and

(your/his/her) current job, since (you were/[he/she] was)

18, how many years (have you/has [he/she]) worked

full-time? Roughly how many years?

Code number of years

-1. None

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 60

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X4513(#1) Including any self-employment and your

X5113(#2) (husband/wife/partner)'s current job, for how many

different employers (have you/has [he/she]) worked in

full-time jobs lasting one year or more?

TREAT SELF-EMPLOYMENT AS ONE EMPLOYER.

Code number of employers

-1. None

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1; less than one year of ful-time employment:

X4512<1/X5112<1)

X4514(#1) Now, not counting (your/her/his) current job, (have you/has

X5114(#2) [he/she]) ever had a full-time job with a different

employer that lasted three years or more?

TREAT SELF-EMPLOYMENT AS ONE EMPLOYER.

1. \*YES

5. \*NO

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1; less than one year of ful-time employment:

X4512<1/X5112<1; no jobs longer than a year:

X4513<1/X5113<1)

X4515(#1) I would like to know about the longest such job (you/[he/she]) had.

X5115(#2) Did (you/[he/she]) work for someone else, (were you/was

[he/she]) self-employed, or what?

THE JOB REPORTED HERE SHOULD NOT BE THE SAME AS THE CURRENT JOB.

1. \*Someone else

2. \*Self-employed; other non-corporate business owned by PEU

3. Partnership; law firm; medical/dental partnership

-7. \*Other

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1; less than one year of ful-time employment:

X4512<1/X5112<1; no jobs longer than a year:

X4513<1/X5113<1; no job longer than 3 years:

X4514^=1/X5114^=1)

X7406(#1) What kind of business or industry did (you/your

X7416(#2) [husband/wife/partner]) work in -- that is, what did they

make or do at the place where (you/[he/she]) worked?

Code Census 2001 3-digit industry code

See X7402/X7412 for definitions

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

In the public version of the data set, these codes have been

collapsed in the following way:

IF (170 <= 4-digit ind. code <=290) THEN ind. code=1;

ELSE IF (7480 <= 4-digit ind. code <=7480) THEN ind. code=1;

ELSE IF (7770 <= 4-digit ind. code <=7770) THEN ind. code=1;

ELSE IF (370 <= 4-digit ind. code <=490) THEN ind. code=2;

ELSE IF (770 <= 4-digit ind. code <=770) THEN ind. code=2;

ELSE IF (1070 <= 4-digit ind. code <=3990) THEN ind. code=3;

ELSE IF (6470 <= 4-digit ind. code <=6480) THEN ind. code=3;

ELSE IF (8560 <= 4-digit ind. code <=8560) THEN ind. code=3;

ELSE IF (4070 <= 4-digit ind. code <=5790) THEN ind. code=4;

ELSE IF (8680 <= 4-digit ind. code <=8690) THEN ind. code=4;

ELSE IF (6490 <= 4-digit ind. code <=6490) THEN ind. code=5;

ELSE IF (6695 <= 4-digit ind. code <=6695) THEN ind. code=5;

ELSE IF (6870 <= 4-digit ind. code <=7080) THEN ind. code=5;

ELSE IF (7190 <= 4-digit ind. code <=7190) THEN ind. code=5;

ELSE IF (7580 <= 4-digit ind. code <=7590) THEN ind. code=5;

ELSE IF (7680 <= 4-digit ind. code <=7680) THEN ind. code=5;

ELSE IF (8770 <= 4-digit ind. code <=8890) THEN ind. code=5;

ELSE IF (570 <= 4-digit ind. code <=690) THEN ind. code=6;

ELSE IF (6070 <= 4-digit ind. code <=6390) THEN ind. code=6;

ELSE IF (6570 <= 4-digit ind. code <=6692) THEN ind. code=6;

ELSE IF (6770 <= 4-digit ind. code <=6780) THEN ind. code=6;

ELSE IF (7170 <= 4-digit ind. code <=7180) THEN ind. code=6;

ELSE IF (7270 <= 4-digit ind. code <=7470) THEN ind. code=6;

ELSE IF (7490 <= 4-digit ind. code <=7570) THEN ind. code=6;

ELSE IF (7670 <= 4-digit ind. code <=7670) THEN ind. code=6;

ELSE IF (7690 <= 4-digit ind. code <=7690) THEN ind. code=6;

ELSE IF (7780 <= 4-digit ind. code <=8470) THEN ind. code=6;

ELSE IF (8570 <= 4-digit ind. code <=8670) THEN ind. code=6;

ELSE IF (8970 <= 4-digit ind. code <=9290) THEN ind. code=6;

ELSE IF (9370 <= 4-digit ind. code <=9890) THEN ind. code=7;

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1; less than one year of ful-time employment:

X4512<1/X5112<1; no jobs longer than a year:

X4513<1/X5113<1; no job longer than 3 years:

X4514^=1/X5114^=1)

X7405(#1) What sort of work (did you/did your [husband/wife/partner])

X7415(#2) do on (your/[his/her]) job?

(Tell me a little more about what (you/[he/she]) did.)

Code Census 2001 3-digit occupation codes

See X7401/X7411 for definitions

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

In the public version of the data set, these codes have been

collapsed in the following way:

IF (10 <= 4-digit occ. code <=200) THEN occ. code=1;

IF (220 <= 4-digit occ. code <=1530) THEN occ. code=1;

IF (1600 <= 4-digit occ. code <=1860) THEN occ. code=1;

IF (2000 <= 4-digit occ. code <=3650) THEN occ. code=1;

ELSE IF (1540 <= 4-digit occ. code <=1560) THEN occ. code=2;

ELSE IF (4700 <= 4-digit occ. code <=5930) THEN occ. code=2;

ELSE IF (1900 <= 4-digit occ. code <=1960) THEN occ. code=2;

ELSE IF (7900 <= 4-digit occ. code <=7900) THEN occ. code=2;

ELSE IF (3700 <= 4-digit occ. code <=4320) THEN occ. code=3;

ELSE IF (4400 <= 4-digit occ. code <=4400) THEN occ. code=3;

ELSE IF (4420 <= 4-digit occ. code <=4650) THEN occ. code=3;

ELSE IF (9840 <= 4-digit occ. code <=9840) THEN occ. code=3;

ELSE IF (6200 <= 4-digit occ. code <=7850) THEN occ. code=4;

ELSE IF (8330 <= 4-digit occ. code <=8330) THEN occ. code=4;

ELSE IF (8350 <= 4-digit occ. code <=8350) THEN occ. code=4;

ELSE IF (8440 <= 4-digit occ. code <=8630) THEN occ. code=4;

ELSE IF (8740 <= 4-digit occ. code <=8760) THEN occ. code=4;

ELSE IF (8810 <= 4-digit occ. code <=8810) THEN occ. code=4;

ELSE IF (4410 <= 4-digit occ. code <=4410) THEN occ. code=5;

ELSE IF (7920 <= 4-digit occ. code <=8320) THEN occ. code=5;

ELSE IF (8340 <= 4-digit occ. code <=8340) THEN occ. code=5;

ELSE IF (8360 <= 4-digit occ. code <=8430) THEN occ. code=5;

ELSE IF (8640 <= 4-digit occ. code <=8730) THEN occ. code=5;

ELSE IF (8800 <= 4-digit occ. code <=8800) THEN occ. code=5;

ELSE IF (8830 <= 4-digit occ. code <=9750) THEN occ. code=5;

ELSE IF (210 <= 4-digit occ. code <=210) THEN occ. code=6;

ELSE IF (4340 <= 4-digit occ. code <=4350) THEN occ. code=6;

ELSE IF (6000 <= 4-digit occ. code <=6130) THEN occ. code=6;

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1; less than one year of ful-time employment:

X4512<1/X5112<1; no jobs longer than a year:

X4513<1/X5113<1; no job longer than 3 years:

X4514^=1/X5114^=1)

In what year did (you/[he/she]) start working for that

employer?

X4518(#1) Code year (4 digits)

X5118(#2) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1; less than one year of ful-time employment:

X4512<1/X5112<1; no jobs longer than a year:

X4513<1/X5113<1; no job longer than 3 years:

X4514^=1/X5114^=1)

X7233(#1) Code age

X7300(#2) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1; less than one year of ful-time employment:

X4512<1/X5112<1; no jobs longer than a year:

X4513<1/X5113<1; no job longer than 3 years:

X4514^=1/X5114^=1)

X7234(#1) Code number of years

X7301(#2) -1. None

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1; less than one year of ful-time employment:

X4512<1/X5112<1; no jobs longer than a year:

X4513<1/X5113<1; no job longer than 3 years:

X4514^=1/X5114^=1)

In what year did (you/[he/she]) stop working at that job?

X4519(#1) Code year (4 digits)

X5119(#2) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1; less than one year of ful-time employment:

X4512<1/X5112<1; no jobs longer than a year:

X4513<1/X5113<1; no job longer than 3 years:

X4514^=1/X5114^=1)

X7235(#1) Code age

X7302(#2) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1; less than one year of ful-time employment:

X4512<1/X5112<1; no jobs longer than a year:

X4513<1/X5113<1; no job longer than 3 years:

X4514^=1/X5114^=1)

X7236(#1) Code number of years

X7303(#2) -1. None

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1; less than one year of ful-time employment:

X4512<1/X5112<1; no jobs longer than a year:

X4513<1/X5113<1; no job longer than 3 years:

X4514^=1/X5114^=1)

X4520(#1) About how much (were you/was [he/she]) earning before taxes

X5120(#2) when (you/[he/she]) stopped?

IF WAGE IS HOURLY, ENTER DOLLARS AND CENTS.

CONFIRMATION SCREEN WILL ONLY SHOW DOLLARS.

Code amount

-1. Nothing

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1; less than one year of ful-time employment:

X4512<1/X5112<1; no jobs longer than a year:

X4513<1/X5113<1; no job longer than 3 years:

X4514^=1/X5114^=1)

X4521(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X5121(#2) (And how often did (you/[he/she]) receive that amount?)

Code frequency

1. \*Day

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only/in total

11. \*Twice per year; every six months

12. Every two months

14. \*By the piece/job

18. \*Hour

22. Varies

31. \*Twice a month

-1. Nothing

-7. \*Other

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1; less than one year of ful-time employment:

X4512<1/X5112<1; no jobs longer than a year:

X4513<1/X5113<1; no job longer than 3 years:

X4514^=1/X5114^=1)

GF

X4522(#1) Since (you were/[he/she] was) 18, have there been years

X5122(#2) when (you/your [husband/wife/partner]) worked only

part-time for all or most of the year?

1. \*YES

5. \*NO

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1)

X4523(#1) About how many years in total did (you/[he/she]) only work

X5123(#2) part-time?

Code number of years

-1. None

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1; no part-time work: X4522^=1/X5122^=1)

Thinking now of the future, in what year or at what age

(do you/does your [husband/wife/partner]) expect to stop

working full-time?

X7237(#1) \*Code year (4-digits)

X7304(#2) -2. \*NEVER STOP

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1)

X7728(#1) \*Code age

X7727(#2) -2. \*NEVER STOP

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1)

X4524(#1) \*Code number of years

X5124(#2) -2. \*NEVER STOP

-1. Less than a year

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1)

DEPENDS was allowed as an response to this question. However, in

processing, this answer was coded as a missing value and imputed.

X6731/X6741 contain the verbatim response when R originally answered

DEPENDS.

X6731(#1) Code reason \*DEPENDS

X6741(#2) 6. As long as health lasts, as long as I can

7. Until have children

8. Until return to school; until get married; until time

of other non-work activity

9. Until finances are adequate; depends on finances

10. Depends on interest, How I feel

11. Depends upon opportunities/economy

12. Never go back full time

13. Whenever find job, ASAP

14. Depends upon health, n.f.s.

15. After school, children

16. Only if need to, no plan

17. When R can turn over/sell the business

18. Depends on retirement age/incentives in future

19. Depends on what spouse/partner does; depends on

spouse/partner health

20. Depends on family needs/situation

21. Depends on whether part-time work is available

22. Depends on when liscensed

25. Depends on availability of child care

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1; original answer not DEPENDS)

X4525(#1) (Do you/Does [he/she]) expect to work part-time after that?

X5125(#2)

1. \*YES

5. \*NO

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1; answer to future full-time work NEVER

STOP: X4524=-2/X5124=-2)

DEPENDS was allowed as an response to this question. However, in

processing, this answer was coded as a missing value and imputed.

X6752/X6762 contain the verbatim response when R originally answered

DEPENDS.

X6752(#1) Code reason \*DEPENDS

X6762(#2) 3. If health lasts; if "feel like it"; health of other

family members

4. If need the money; if "need to"; the "economy"

6. If still enjoying work

7. If there is an interesting opportunity

11. If get bored

13. Whenever find job, ASAP

15. After school, children

19. Depends on what spouse/partner does; depends on

spouse/partner health

20. Depends on family needs/situation

21. Depends on whether part-time work is available

22. Depends on when licensed

25. Depends on availability of child care

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1; answer to future full-time work NEVER

STOP: X4524=-2/X5124=-2; original answer not DEPENDS)

In what year (do you/does [he/she]) expect to stop working

altogether?

X7238(#1) Code year (4 digits)

X7305(#2) -2. \*NEVER STOP

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1; answer to future full-time work NEVER

STOP: X4524=-2/X5124=-2; not expecting to work

part-time: X4525^=1/X5125^=1)

X7700(#1) Code age

X7729(#2) -2. \*NEVER STOP

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1; answer to future full-time work NEVER

STOP: X4524=-2/X5124=-2; not expecting to work

part-time: X4525^=1/X5125^=1)

X4526(#1) Code number of years

X5126(#2) -1. Less than a year

-2. \*NEVER STOP

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1; answer to future full-time work NEVER

STOP: X4524=-2/X5124=-2; not expecting to work

part-time: X4525^=1/X5125^=1)

DEPENDS was allowed as an response to this question. However, in

processing, this answer was coded as a missing value and imputed.

X6732/X6742 contain the verbatim response when R originally answered

DEPENDS.

X6732(#1) Code reason \*DEPENDS

X6742(#2) 6. As long as health lasts, as long as I can

7. Until have children

8. Until return to school; until get married; until time

of other non-work activity

9. Until finances are adequate; depends on finances

10. Depends on interest, How I feel

11. Depends upon opportunities/economy

12. Never go back full time

13. Whenever find job, ASAP

14. Depends upon health, n.f.s.

15. After school, children

16. Only if need to, no plan

17. When R can turn over/sell the business

18. Depends on retirement age/incentives in future

19. Depends on what spouse does; depends on spouse/partner health

20. Depends on family needs/situation

21. Depends on whether part-time work is available

22. Depends on when licensed

25. Depends on availability of child care

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working full-time: X4511^=1/

X5111^=1; answer to future full-time work NEVER

STOP: X4524=-2/X5124=-2; not expecting to work

part-time: X4525^=1/X5125^=1; original answer not DEPENDS)

-----------------------------------------------------------------------------

CURRENTLY WORKING PART-TIME

-----------------------------------------------------------------------------

X4527(#1) Now I have a few questions about your (husband/wife/partner)'s

X5127(#2) work experience. Including any self-employment and

(your/your [husband's/wife's/partner's]) current job, since

(you were/[he/she] was) 18, about how many years

(have you/has [he/she]) worked part-time for all or most of

the year?

Code number of years

-1. Less than a year

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2)

X4528(#1) Since (you were/[he/she] was) 18, (have you/has [he/she])

X5128(#2) ever worked full-time for pay -- including any

self-employment and the military?

1. \*YES

5. \*NO

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2)

X4529(#1) How many years (have you/has [he/she]) worked full-time for

X5129(#2) all or most of the year?

Code number of years

-1. Less than a year

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no full-time jobs: X4528^=1/X5128^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 60

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X4530(#1) Was that five years or more?

X5130(#2)

INTERVIEWER CHECKPOINT - SEE X4529/X5129

1. R HAS WORKED FULL-TIME FOR 5 YEARS OR MORE OR DK

2. LESS THAN 5 YEARS

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no full-time jobs: X4528^=1/X5128^=1)

In what year did (you/[he/she]) last work full-time for pay?

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X4531(#1) Code year (4 digits)

X5131(#2) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no full-time jobs: X4528^=1/X5128^=1; worked

5 years or more full-time: X4530=1/X5130=1)

X7239(#1) Code age

X7306(#2) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no full-time jobs: X4528^=1/X5128^=1; worked

5 years or more full-time: X4530=1/X5130=1)

X7240(#1) Code number of years

X7307(#2) -1. Less than a year

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no full-time jobs: X4528^=1/X5128^=1; worked

5 years or more full-time: X4530=1/X5130=1)

X4532(#1) About how much did (you/[he/she]) earn before taxes that year?

X5132(#2)

IF WAGE IS HOURLY, ENTER DOLLARS AND CENTS.

CONFIRMATION SCREEN WILL ONLY SHOW DOLLARS.

Code amount

-1. Nothing

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no full-time jobs: X4528^=1/X5128^=1; worked

5 years or more full-time: X4530=1/X5130=1)

X4533(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X5133(#2) (And how often did (you/[he/she]) receive that amount?)

Code frequency

1. \*Day

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only/in total

11. \*Twice per year; every six months

12. Every two months

14. \*By the piece/job

18. \*Hour

22. Varies

31. \*Twice a month

-1. Nothing

-7. \*Other

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no full-time jobs: X4528^=1/X5128^=1; worked

5 years or more full-time: X4530=1/X5130=1)

X4534(#1) Including any self-employment and any full-time work on

X5134(#2) your (husband/wife/partner)'s current job, for how many

different employers (have you/has [he/she]) worked in

full-time jobs lasting one year or more?

TREAT SELF-EMPLOYMENT AS ONE EMPLOYER.

Code number of employers

-1. None

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no full-time jobs: X4528^=1/X5128^=1; did

not work 5 years or more full-time: X4530=^1/X5130^=1)

X4535(#1) I would like to know about the longest full-time job (you/[he/she])

X5135(#2) had. Was the employer the same as

(your/your [husband's/wife's/partner's]) current employer,

(were you/was [he/she]) self-employed, did (you/[he/she])

work for someone else, or what?

1. \*Someone else

2. \*Self-employed; other non-corporate business owned by PEU

3. Partnership; law firm; medical/dental partnership

4. \*Same as current employer

-7. \*Other

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no full-time jobs: X4528^=1/X5128^=1; did

not work 5 years or more full-time: X4530=^1/X5130^=1)

X7408(#1) What kind of business or industry did

X7418(#2) (you/your [husband/wife/partner]) work in -- that is, what

did they make or do at the place where (you/[he/she]) worked?

Code Census 2001 3-digit industry code

See X7402/X7412 for definitions

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

In the public version of the data set, these codes have been

collapsed in the following way:

IF (170 <= 4-digit ind. code <=290) THEN ind. code=1;

ELSE IF (7480 <= 4-digit ind. code <=7480) THEN ind. code=1;

ELSE IF (7770 <= 4-digit ind. code <=7770) THEN ind. code=1;

ELSE IF (370 <= 4-digit ind. code <=490) THEN ind. code=2;

ELSE IF (770 <= 4-digit ind. code <=770) THEN ind. code=2;

ELSE IF (1070 <= 4-digit ind. code <=3990) THEN ind. code=3;

ELSE IF (6470 <= 4-digit ind. code <=6480) THEN ind. code=3;

ELSE IF (8560 <= 4-digit ind. code <=8560) THEN ind. code=3;

ELSE IF (4070 <= 4-digit ind. code <=5790) THEN ind. code=4;

ELSE IF (8680 <= 4-digit ind. code <=8690) THEN ind. code=4;

ELSE IF (6490 <= 4-digit ind. code <=6490) THEN ind. code=5;

ELSE IF (6695 <= 4-digit ind. code <=6695) THEN ind. code=5;

ELSE IF (6870 <= 4-digit ind. code <=7080) THEN ind. code=5;

ELSE IF (7190 <= 4-digit ind. code <=7190) THEN ind. code=5;

ELSE IF (7580 <= 4-digit ind. code <=7590) THEN ind. code=5;

ELSE IF (7680 <= 4-digit ind. code <=7680) THEN ind. code=5;

ELSE IF (8770 <= 4-digit ind. code <=8890) THEN ind. code=5;

ELSE IF (570 <= 4-digit ind. code <=690) THEN ind. code=6;

ELSE IF (6070 <= 4-digit ind. code <=6390) THEN ind. code=6;

ELSE IF (6570 <= 4-digit ind. code <=6692) THEN ind. code=6;

ELSE IF (6770 <= 4-digit ind. code <=6780) THEN ind. code=6;

ELSE IF (7170 <= 4-digit ind. code <=7180) THEN ind. code=6;

ELSE IF (7270 <= 4-digit ind. code <=7470) THEN ind. code=6;

ELSE IF (7490 <= 4-digit ind. code <=7570) THEN ind. code=6;

ELSE IF (7670 <= 4-digit ind. code <=7670) THEN ind. code=6;

ELSE IF (7690 <= 4-digit ind. code <=7690) THEN ind. code=6;

ELSE IF (7780 <= 4-digit ind. code <=8470) THEN ind. code=6;

ELSE IF (8570 <= 4-digit ind. code <=8670) THEN ind. code=6;

ELSE IF (8970 <= 4-digit ind. code <=9290) THEN ind. code=6;

ELSE IF (9370 <= 4-digit ind. code <=9890) THEN ind. code=7;

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no full-time jobs: X4528^=1/X5128^=1; did

not work 5 years or more full-time: X4530=^1/X5130^=1)

GF

X7407(#1) What sort of work (did you/did your [husband/wife/partner])

X7417(#2) do on (your/[his/her]) job?

When (you/your [husband/wife/partner]) stopped working

full-time for (your/[his/her]) current employer, what sort

of work (did you/did your [husband/wife/partner]) do on

(your/[his/her]) job?

(Tell me a little more about what (you/[he/she]) did.)

Code Census 2001 3-digit occupation codes

See X7401/X7411 for definitions

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

In the public version of the data set, these codes have been

collapsed in the following way:

IF (10 <= 4-digit occ. code <=200) THEN occ. code=1;

IF (220 <= 4-digit occ. code <=1530) THEN occ. code=1;

IF (1600 <= 4-digit occ. code <=1860) THEN occ. code=1;

IF (2000 <= 4-digit occ. code <=3650) THEN occ. code=1;

ELSE IF (1540 <= 4-digit occ. code <=1560) THEN occ. code=2;

ELSE IF (4700 <= 4-digit occ. code <=5930) THEN occ. code=2;

ELSE IF (1900 <= 4-digit occ. code <=1960) THEN occ. code=2;

ELSE IF (7900 <= 4-digit occ. code <=7900) THEN occ. code=2;

ELSE IF (3700 <= 4-digit occ. code <=4320) THEN occ. code=3;

ELSE IF (4400 <= 4-digit occ. code <=4400) THEN occ. code=3;

ELSE IF (4420 <= 4-digit occ. code <=4650) THEN occ. code=3;

ELSE IF (9840 <= 4-digit occ. code <=9840) THEN occ. code=3;

ELSE IF (6200 <= 4-digit occ. code <=7850) THEN occ. code=4;

ELSE IF (8330 <= 4-digit occ. code <=8330) THEN occ. code=4;

ELSE IF (8350 <= 4-digit occ. code <=8350) THEN occ. code=4;

ELSE IF (8440 <= 4-digit occ. code <=8630) THEN occ. code=4;

ELSE IF (8740 <= 4-digit occ. code <=8760) THEN occ. code=4;

ELSE IF (8810 <= 4-digit occ. code <=8810) THEN occ. code=4;

ELSE IF (4410 <= 4-digit occ. code <=4410) THEN occ. code=5;

ELSE IF (7920 <= 4-digit occ. code <=8320) THEN occ. code=5;

ELSE IF (8340 <= 4-digit occ. code <=8340) THEN occ. code=5;

ELSE IF (8360 <= 4-digit occ. code <=8430) THEN occ. code=5;

ELSE IF (8640 <= 4-digit occ. code <=8730) THEN occ. code=5;

ELSE IF (8800 <= 4-digit occ. code <=8800) THEN occ. code=5;

ELSE IF (8830 <= 4-digit occ. code <=9750) THEN occ. code=5;

ELSE IF (210 <= 4-digit occ. code <=210) THEN occ. code=6;

ELSE IF (4340 <= 4-digit occ. code <=4350) THEN occ. code=6;

ELSE IF (6000 <= 4-digit occ. code <=6130) THEN occ. code=6;

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no full-time jobs: X4528^=1/X5128^=1; did

not work 5 years or more full-time: X4530=^1/X5130^=1)

In what year did (you/[he/she]) start working for that employer?

X4538(#1) Code year (4 digits)

X5138(#2) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no full-time jobs: X4528^=1/X5128^=1; did

not work 5 years or more full-time: X4530=^1/X5130^=1)

X7241(#1) Code age

X7308(#2) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no full-time jobs: X4528^=1/X5128^=1; did

not work 5 years or more full-time: X4530=^1/X5130^=1)

X7242(#1) Code number of years

X7309(#2) -1. Less than a year

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no full-time jobs: X4528^=1/X5128^=1; did

not work 5 years or more full-time: X4530=^1/X5130^=1)

When did (you/[he/she]) stop working full-time at that job?

X4539(#1) Code year (4 digits)

X5139(#2) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no full-time jobs: X4528^=1/X5128^=1; did

not work 5 years or more full-time: X4530=^1/X5130^=1)

X7243(#1) Code age

X7310(#2) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no full-time jobs: X4528^=1/X5128^=1; did

not work 5 years or more full-time: X4530=^1/X5130^=1)

X7244(#1) Code number of years

X7311(#2) -1. Less than a year

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no full-time jobs: X4528^=1/X5128^=1; did

not work 5 years or more full-time: X4530=^1/X5130^=1)

GF

X4540(#1) About how much (were you/was [he/she]) earning before taxes

X5140(#2) when (you/[he/she]) stopped?

When (you/your [husband/wife/partner]) stopped working

full-time for (your/[his/her]) current employer, about

how much (were you/was [he/she]) earning before taxes

when (you/[he/she]) stopped?

IF WAGE IS HOURLY, ENTER DOLLARS AND CENTS.

CONFIRMATION SCREEN WILL ONLY SHOW DOLLARS.

Code amount

-1. Nothing

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no full-time jobs: X4528^=1/X5128^=1; did

not work 5 years or more full-time: X4530=^1/X5130^=1)

X4541(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X5141(#2) (And how often did (you/[he/she]) receive that amount?)

Code frequency

1. \*Day

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. Year

8. Lump sum; one payment only/in total

11. \*Twice per year; every six months

12. Every two months

14. By the piece/job

18. \*Hour

22. Varies

31. \*Twice a month

-1. Nothing

-7. \*Other

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no full-time jobs: X4528^=1/X5128^=1; did

not work 5 years or more full-time: X4530=^1/X5130^=1)

In what year did (you/your [husband/wife/partner]) last work

full-time for pay?

X4542(#1) Code year (4 digits)

X5142(#2) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no full-time jobs: X4528^=1/X5128^=1; did

not work 5 years or more full-time: X4530=^1/X5130^=1)

X7245(#1) Code age

X7312(#2) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no full-time jobs: X4528^=1/X5128^=1; did

not work 5 years or more full-time: X4530=^1/X5130^=1)

X7246(#1) Code number of years

X7313(#2) -1. Less than a year

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2); no full-time jobs: X4528^=1/X5128^=1; did

not work 5 years or more full-time: X4530=^1/X5130^=1)

X4543(#1) Thinking now of the future, (do you/does your

X5143(#2) [husband/wife/partner]) expect to do any full-time work for pay?

1. \*YES

5. \*NO

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2)

DEPENDS was allowed as an response to this question. However, in

processing, this answer was coded as a missing value and imputed.

X6753/X6763 contain the verbatim response when R originally answered

DEPENDS.

X6753(#1) Code reason \*DEPENDS

X6763(#2) 3. If health lasts; if "feel like it"; health of other

family members

4. If need the money; if "need to"; the "economy"

6. If still enjoying work

7. If there is an interesting opportunity

11. If get bored

13. Whenever find job, ASAP

15. After school, children

19. Depends on what spouse does; depends on spouse/partner health

20. Depends on family needs/situation

21. Depends on whether part-time work is available

22. Depends on when licensed

25. Depends on availability of child care

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; original answer not DEPENDS)

In what year (do you/does [he/she]) expect to start working

full-time?

X7247(#1) \*Code year (4 digits)

X7314(#2) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no future full-time work: X6643^=1/X5143^=1)

X7248(#1) \*Code age

X7315(#2) 0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no future full-time work: X6643^=1/X5143^=1)

X4544(#1) \*Code number of years

X5144(#2) -1. Less than a year

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no future full-time work: X6643^=1/X5143^=1)

DEPENDS was allowed as an response to this question. However, in

processing, this answer was coded as a missing value and imputed.

X6733/X6743 contain the verbatim response when R originally answered

DEPENDS.

X6733(#1) Code reason \*DEPENDS

X6743(#2) 6. As long as health lasts, as long as I can

7. Until have children

8. Until return to school; until get married; until time

of other non-work activity

9. Until finances are adequate; depends on finances

10. Depends on interest, How I feel

11. Depends upon opportunities/economy

12. Never go back full time

13. Whenever find job, ASAP

14. Depends upon health, n.f.s.

15. After school, children

16. Only if need to, no plan

17. When R can turn over/sell the business

18. Depends on retirement age/incentives in future

19. Depends on what spouse/partner does; depends on

spouse/partner health

20. Depends on family needs/situation

21. Depends on whether part-time work is available

22. Depends on when licensed

25. Depends on availability of child care

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; o future full-time work: X6643^=1/X5143^=1;

original answer not DEPENDS)

In what year (do you/does [he/she]) expect to stop working

full-time?

X7249(#1) \*Code year (4 digits)

X7316(#2) -2. \*NEVER STOP

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no future full-time work: X6643^=1/X5143^=1)

X7701(#1) \*Code age

X7730(#2) -2. \*NEVER STOP

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no future full-time work: X6643^=1/X5143^=1)

X4545(#1) \*Code number of years

X5145(#2) -1. Less than a year

-2. \*NEVER STOP

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no future full-time work: X6643^=1/X5143^=1)

DEPENDS was allowed as an response to this question. However, in

processing, this answer was coded as a missing value and imputed.

X6734/X6744 contain the verbatim response when R originally answered

DEPENDS.

X6734(#1) Code reason \*DEPENDS

X6744(#2) 6. As long as health lasts, as long as I can

7. Until have children

8. Until return to school; until get married; until time

of other non-work activity

9. Until finances are adequate; depends on finances

10. Depends on interest, How I feel

11. Depends upon opportunities/economy

12. Never go back full time

13. Whenever find job, ASAP

14. Depends upon health, n.f.s.

15. After school, children

16. Only if need to, no plan

17. When R can turn over/sell the business

18. Depends on retirement age/incentives in future

19. Depends on what spouse does; depends on spouse/partner health

20. Depends on family needs/situation

21. Depends on whether part-time work is available

22. Depends on when licensed

25. Depends on availability of child care

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; no future full-time work: X6643^=1/X5143^=1;

original answer not DEPENDS)

In what year (do you/does [he/she]) expect to stop working

for pay altogether?

X7250(#1) \*Code year (4 digits)

X7317(#2) -2. \*NEVER STOP

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2)

X7702(#1) \*Code age

X7731(#2) -2. \*NEVER STOP

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2)

X4546(#1) \*Code number of years

X5146(#2) -1. Less than a year

-2. \*NEVER STOP

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2)

DEPENDS was allowed as an response to this question. However, in

processing, this answer was coded as a missing value and imputed.

X6735/X6745 contain the verbatim response when R originally answered

DEPENDS.

X6735(#1) Code reason \*DEPENDS

X6745(#2) 6. As long as health lasts, as long as I can

7. Until have children

8. Until return to school; until get married; until time

of other non-work activity

9. Until finances are adequate; depends on finances

10. Depends on interest, How I feel

11. Depends upon opportunities/economy

12. Never go back full time

13. Whenever find job, ASAP

14. Depends upon health, n.f.s.

15. After school, children

16. Only if need to, no plan

17. When R can turn over/sell the business

18. Depends on retirement age/incentives in future

19. Depends on what spouse does; depends on spouse/partner health

20. Depends on family needs/situation

21. Depends on whether part-time work is available

22. Depends on when licensed

25. Depends on availability of child care

0. Inap. (not doing any work for pay: X4105=5/X4705=5;/

no spouse; not currently working part-time: X4511^=2/

X5111^=2; original response not DEPENDS)

-----------------------------------------------------------------------------

CURRENTLY NOT WORKING

-----------------------------------------------------------------------------

X4601(#1) Since (you were/[he/she] was) 18, (have you/has [he/she])

X5201(#2) ever worked full-time for pay?

1. \*YES

5. \*NO

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse)

X4602(#1) How many years (have you/has [he/she]) worked full-time for

X5202(#2) all or most of the year? Include any periods of

self-employment, and the military. Roughly, how many years?

Code number of years

-1. None

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; never worked full-time: X4601^=1/X5201^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 60

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X4603(#1) Was that five years or more?

X5203(#2) INTERVIEWER CHECKPOINT - SEE X4602/X5202

1. R HAS WORKED FULL-TIME FOR 5 YEARS OR MORE OR DK

2. LESS THAN 5 YEARS

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; never worked full-time: X4601^=1/X5201^=1)

In what year did (you/[he/she]) last work full-time for pay?

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X4604(#1) Code year

X5204(#2) 0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; never worked full-time: X4601^=1/X5201^=1;

at least 5 years full-time: X4603=1/X5203=1)

X7251(#1) Code age

X7318(#2) 0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; never worked full-time: X4601^=1/X5201^=1;

at least 5 years full-time: X4603=1/X5203=1)

X7252(#1) Code number of years

X7319(#2) -1. Less than one

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; never worked full-time: X4601^=1/X5201^=1;

at least 5 years full-time: X4603=1/X5203=1)

X4605(#1) About how much did (you/[he/she]) earn before taxes that year?

X5205(#2)

IF WAGE IS HOURLY, ENTER DOLLARS AND CENTS.

CONFIRMATION SCREEN WILL ONLY SHOW DOLLARS.

Code amount

-1. Nothing

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; never worked full-time: X4601^=1/X5201^=1;

at least 5 years full-time: X4603=1/X5203=1)

X4606(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X5206(#2) (And how often did (you/[he/she]) receive that amount?)

Code frequency

1. \*Day

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only/in total

11. Twice per year; every six months

12. Every two months

14. \*By the piece/job

18. \*Hour

22. Varies

31. \*Twice a month

-1. Nothing

-7. \*Other

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; never worked full-time: X4601^=1/X5201^=1;

at least 5 years full-time: X4603=1/X5203=1)

X4607(#1) Including any self-employment, for how many different

X5207(#2) employers (have you/has [he/she]) worked in full-time jobs

lasting one year or more?

TREAT SELF-EMPLOYMENT AS ONE EMPLOYER.

Code number of employers

-1. None

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; never worked full-time: X4601^=1/X5201^=1;

less than 5 years full-time: X4603=2/X5203=2)

X4608(#1) I would like to know about this full-time job (you/[he/she])

X5208(#2)

I would like to know about the longest full-time job (you/[he/she])

had. Did (you/[he/she]) work for someone else, (were you/was

[he/she]) self-employed, or what?

1. \*Someone else

2. \*Self-employed; other non-corporate business owned by PEU

3. Partnership; law firm; medical/dental partnership

-7. \*Other

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; never worked full-time: X4601^=1/X5201^=1;

less than 5 years full-time: X4603=2/X5203=2)

X7410(#1) What kind of business or industry did (you/your[husband/wife/

X7420(#2) partner]) work in -- that is, what did they make or do at

the place where (you/[he/she]) worked?

Code Census 2001 3-digit industry code

See X7402/X7412 for definitions

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

In the public version of the data set, these codes have been

collapsed in the following way:

IF (170 <= 4-digit ind. code <=290) THEN ind. code=1;

ELSE IF (7480 <= 4-digit ind. code <=7480) THEN ind. code=1;

ELSE IF (7770 <= 4-digit ind. code <=7770) THEN ind. code=1;

ELSE IF (370 <= 4-digit ind. code <=490) THEN ind. code=2;

ELSE IF (770 <= 4-digit ind. code <=770) THEN ind. code=2;

ELSE IF (1070 <= 4-digit ind. code <=3990) THEN ind. code=3;

ELSE IF (6470 <= 4-digit ind. code <=6480) THEN ind. code=3;

ELSE IF (8560 <= 4-digit ind. code <=8560) THEN ind. code=3;

ELSE IF (4070 <= 4-digit ind. code <=5790) THEN ind. code=4;

ELSE IF (8680 <= 4-digit ind. code <=8690) THEN ind. code=4;

ELSE IF (6490 <= 4-digit ind. code <=6490) THEN ind. code=5;

ELSE IF (6695 <= 4-digit ind. code <=6695) THEN ind. code=5;

ELSE IF (6870 <= 4-digit ind. code <=7080) THEN ind. code=5;

ELSE IF (7190 <= 4-digit ind. code <=7190) THEN ind. code=5;

ELSE IF (7580 <= 4-digit ind. code <=7590) THEN ind. code=5;

ELSE IF (7680 <= 4-digit ind. code <=7680) THEN ind. code=5;

ELSE IF (8770 <= 4-digit ind. code <=8890) THEN ind. code=5;

ELSE IF (570 <= 4-digit ind. code <=690) THEN ind. code=6;

ELSE IF (6070 <= 4-digit ind. code <=6390) THEN ind. code=6;

ELSE IF (6570 <= 4-digit ind. code <=6692) THEN ind. code=6;

ELSE IF (6770 <= 4-digit ind. code <=6780) THEN ind. code=6;

ELSE IF (7170 <= 4-digit ind. code <=7180) THEN ind. code=6;

ELSE IF (7270 <= 4-digit ind. code <=7470) THEN ind. code=6;

ELSE IF (7490 <= 4-digit ind. code <=7570) THEN ind. code=6;

ELSE IF (7670 <= 4-digit ind. code <=7670) THEN ind. code=6;

ELSE IF (7690 <= 4-digit ind. code <=7690) THEN ind. code=6;

ELSE IF (7780 <= 4-digit ind. code <=8470) THEN ind. code=6;

ELSE IF (8570 <= 4-digit ind. code <=8670) THEN ind. code=6;

ELSE IF (8970 <= 4-digit ind. code <=9290) THEN ind. code=6;

ELSE IF (9370 <= 4-digit ind. code <=9890) THEN ind. code=7;

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; never worked full-time: X4601^=1/X5201^=1;

less than 5 years full-time: X4603=2/X5203=2)

X7409(#1) What sort of work (did you/did your [husband/wife/partner])

X7419(#2) do on (your/[his/her]) job?

(Tell me a little more about what (you/[he/she]) did.)

Code Census 2001 3-digit occupation codes

See X7401/X7411 for definitions

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

In the public version of the data set, these codes have been

collapsed in the following way:

IF (10 <= 4-digit occ. code <=200) THEN occ. code=1;

IF (220 <= 4-digit occ. code <=1530) THEN occ. code=1;

IF (1600 <= 4-digit occ. code <=1860) THEN occ. code=1;

IF (2000 <= 4-digit occ. code <=3650) THEN occ. code=1;

ELSE IF (1540 <= 4-digit occ. code <=1560) THEN occ. code=2;

ELSE IF (4700 <= 4-digit occ. code <=5930) THEN occ. code=2;

ELSE IF (1900 <= 4-digit occ. code <=1960) THEN occ. code=2;

ELSE IF (7900 <= 4-digit occ. code <=7900) THEN occ. code=2;

ELSE IF (3700 <= 4-digit occ. code <=4320) THEN occ. code=3;

ELSE IF (4400 <= 4-digit occ. code <=4400) THEN occ. code=3;

ELSE IF (4420 <= 4-digit occ. code <=4650) THEN occ. code=3;

ELSE IF (9840 <= 4-digit occ. code <=9840) THEN occ. code=3;

ELSE IF (6200 <= 4-digit occ. code <=7850) THEN occ. code=4;

ELSE IF (8330 <= 4-digit occ. code <=8330) THEN occ. code=4;

ELSE IF (8350 <= 4-digit occ. code <=8350) THEN occ. code=4;

ELSE IF (8440 <= 4-digit occ. code <=8630) THEN occ. code=4;

ELSE IF (8740 <= 4-digit occ. code <=8760) THEN occ. code=4;

ELSE IF (8810 <= 4-digit occ. code <=8810) THEN occ. code=4;

ELSE IF (4410 <= 4-digit occ. code <=4410) THEN occ. code=5;

ELSE IF (7920 <= 4-digit occ. code <=8320) THEN occ. code=5;

ELSE IF (8340 <= 4-digit occ. code <=8340) THEN occ. code=5;

ELSE IF (8360 <= 4-digit occ. code <=8430) THEN occ. code=5;

ELSE IF (8640 <= 4-digit occ. code <=8730) THEN occ. code=5;

ELSE IF (8800 <= 4-digit occ. code <=8800) THEN occ. code=5;

ELSE IF (8830 <= 4-digit occ. code <=9750) THEN occ. code=5;

ELSE IF (210 <= 4-digit occ. code <=210) THEN occ. code=6;

ELSE IF (4340 <= 4-digit occ. code <=4350) THEN occ. code=6;

ELSE IF (6000 <= 4-digit occ. code <=6130) THEN occ. code=6;

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; never worked full-time: X4601^=1/X5201^=1;

less than 5 years full-time: X4603=2/X5203=2)

In what year did (you/[he/she]) start working for that employer?

X4611(#1) Code year (4 digits)

X5211(#2) 0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; never worked full-time: X4601^=1/X5201^=1;

less than 5 years full-time: X4603=2/X5203=2)

X7253(#1) Code age

X7320(#2) 0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; never worked full-time: X4601^=1/X5201^=1;

less than 5 years full-time: X4603=2/X5203=2)

X7254(#1) Code number of years

X7321(#2) -1. Less than a year

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; never worked full-time: X4601^=1/X5201^=1;

less than 5 years full-time: X4603=2/X5203=2)

In what year did (you/[he/she]) stop working at that job?

X4612(#1) Code year (4 digits)

X5212(#2) 0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; never worked full-time: X4601^=1/X5201^=1;

less than 5 years full-time: X4603=2/X5203=2)

X7255(#1) Code age

X7322(#2) 0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; never worked full-time: X4601^=1/X5201^=1;

less than 5 years full-time: X4603=2/X5203=2)

X7256(#1) Code number of years

X7323(#2) -1. Less than a year

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; never worked full-time: X4601^=1/X5201^=1;

less than 5 years full-time: X4603=2/X5203=2)

GF

X4613(#1) About how much (were you/was [he/she]) earning before taxes

X5213(#2) when (you/[he/she]) stopped working full-time at this job?

IF WAGE IS HOURLY, ENTER DOLLARS AND CENTS.

CONFIRMATION SCREEN WILL ONLY SHOW DOLLARS.

Code amount

-1. Nothing

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; never worked full-time: X4601^=1/X5201^=1;

less than 5 years full-time: X4603=2/X5203=2)

X4614(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X5214(#2) (And how often did (you/[he/she]) receive that amount?)

Code frequency

1. \*Day

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only/in total

11. \*Twice per year; every six months

12. Every two months

14. \*By the piece/job

18. \*Hour

22. Varies

31. \*Twice a month

-1. Nothing

-7. \*Other

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; never worked full-time: X4601^=1/X5201^=1;

less than 5 years full-time: X4603=2/X5203=2)

GF

X4615(#1) Since (you were/[he/she] was) 18, were there any years when

X5215(#2) (you/[he/she]) only worked part-time for all or most of the

year?

1. \*YES

5. \*NO

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse)

X4616(#1) For about how many years did (you/[he/she]) work part-time

X5216(#2) for all or most of the year?

Code number of years

-1. Less than a year

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; no part-time work: X4615^=1/X5215^=1)

X4617(#1) (Do you/Does [he/she]) expect to work for pay in the future?

X5217(#2)

1. \*YES

5. \*NO

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse)

In what year (do you/does your [husband/wife/partner])

expect to start working?

X7257(#1) \*Code year (4 digits)

X7324(#2) 0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; does not expect to work in future:

X4617^=1/X5217^=1)

X7258(#1) \*Code age

X7325(#2) 0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; does not expect to work in future:

X4617^=1/X5217^=1)

X4618(#1) \*Code number of years

X5218(#2) -1. Less than a year

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; does not expect to work in future:

X4617^=1/X5217^=1)

DEPENDS was allowed as an response to this question. However, in

processing, this answer was coded as a missing value and imputed.

X6736/X6746 contain the verbatim response when R originally answered

DEPENDS.

X6736(#1) Code reason \*DEPENDS

X6746(#2) 6. As long as health lasts, as long as I can

7. Until have children

8. Until return to school; until get married; until time

of other non-work activity

9. Until finances are adequate; depends on finances

10. Depends on interest, How I feel

11. Depends upon opportunities/economy

12. Never go back full time

13. Whenever find job, ASAP

14. Depends upon health, n.f.s.

15. After school, children

16. Only if need to, no plan

17. When R can turn over/sell the business

18. Depends on retirement age/incentives in future

19. Depends on what spouse does; depends on spouse/partner health

20. Depends on family needs/situation

21. Depends on whether part-time work is available

22. Depends on when licensed

25. Depends on availability of child care

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; does not expect to work in future:

X4617^=1/X5217^=1: original response not DEPENDS)

X4619(#1) Will any of that be full-time work?

X5219(#2)

1. \*YES

5. \*NO

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; does not expect to work in future:

X4617^=1/X5217^=1)

DEPENDS was allowed as an response to this question. However, in

processing, this answer was coded as a missing value and imputed.

X6754/X6764 contain the verbatim response when R originally answered

DEPENDS.

X6754(#1) Code reason \*DEPENDS

X6764(#2) 4. As soon as can find full-time job

6. Depends on pay

7. Depends on health or health-related issue

8. No particular plans

9. Expect to go into self-employment/expand time for

self-employment

10. Depends upon family or child-care issues

11. Depends on opportunities/interest

12. Depends on finances

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; does not expect to work in future:

X4617^=1/X5217^=1; original response not DEPENDS)

In what year (do you/does [he/she]) expect to start working

full-time?

X7259(#1) \*Code year (4 digits)

X7326(#2) 0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; does not expect to work in future:

X4617^=1/X5217^=1; does not expect to work full-time:

X4619^=1/X5219^=1)

X7260(#1) \*Code age

X7327(#2) 0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; does not expect to work in future:

X4617^=1/X5217^=1; does not expect to work full-time:

X4619^=1/X5219^=1)

X4620(#1) \*Code number of years

X5220(#2) -1. Less than a year

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; does not expect to work in future:

X4617^=1/X5217^=1; does not expect to work full-time:

X4619^=1/X5219^=1)

DEPENDS was allowed as an response to this question. However, in

processing, this answer was coded as a missing value and imputed.

X6737/X6747 contain the verbatim response when R originally answered

DEPENDS.

X6737(#1) Code reason \*DEPENDS

X6747(#2) 6. As long as health lasts, as long as I can

7. Until have children

8. Until return to school; until get married; until time

of other non-work activity

9. Until finances are adequate; depends on finances

10. Depends on interest, How I feel

11. Depends upon opportunities/economy

12. Never go back full time

13. Whenever find job, ASAP

14. Depends upon health, n.f.s.

15. After school, children

16. Only if need to, no plan

17. When R can turn over/sell the business

18. Depends on retirement age/incentives in future

19. Depends on what spouse does; depends on spouse/partner health

20. Depends on family needs/situation

21. Depends on whether part-time work is available

22. Depends on when licensed

25. Depends on availability of child care

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; does not expect to work in future:

X4617^=1/X5217^=1; does not expect to work full-time:

X4619^=1/X5219^=1; original response not DEPENDS)

In what year (do you/does [he/she]) expect to stop working

full-time?

X7261(#1) Code year (4 digits)

X7328(#2) -2. \*NEVER STOP

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; does not expect to work in future:

X4617^=1/X5217^=1; does not expect to work full-time:

X4619^=1/X5219^=1)

X7703(#1) Code age

X7732(#2) -2. \*NEVER STOP

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; does not expect to work in future:

X4617^=1/X5217^=1; does not expect to work full-time:

X4619^=1/X5219^=1)

X4621(#1) Code number of years

X5221(#2) -1. Less than a year

-2. \*NEVER STOP

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; does not expect to work in future:

X4617^=1/X5217^=1; does not expect to work full-time:

X4619^=1/X5219^=1)

DEPENDS was allowed as an response to this question. However, in

processing, this answer was coded as a missing value and imputed.

X6738/X6748 contain the verbatim response when R originally answered

DEPENDS.

X6738(#1) Code reason \*DEPENDS

X6748(#2) 6. As long as health lasts, as long as I can

7. Until have children

8. Until return to school; until get married; until time

of other non-work activity

9. Until finances are adequate; depends on finances

10. Depends on interest, How I feel

11. Depends upon opportunities/economy

12. Never go back full time

13. Whenever find job, ASAP

14. Depends upon health, n.f.s.

15. After school, children

16. Only if need to, no plan

17. When R can turn over/sell the business

18. Depends on retirement age/incentives in future

19. Depends on what spouse does; depends on spouse/partner health

20. Depends on family needs/situation

21. Depends on whether part-time work is available

22. Depends on when licensed

25. Depends on availability of child care

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; does not expect to work in future:

X4617^=1/X5217^=1; does not expect to work full-time:

X4619^=1/X5219^=1; oroginal response not DEPENDS)

In what year (do you/does [he/she]) expect to stop working

for pay altogether?

X7262(#2) \*Code year

X7329(#2) -2. \*NEVER STOP

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; does not expect to work in future:

X4617^=1/X5217^=1)

X7704(#1) \*Code age

X7733(#1) -2. \*NEVER STOP

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; does not expect to work in future:

X4617^=1/X5217^=1)

X4622(#1) \*Code number of years

X5222(#2) -1. Less than a year

-2. \*NEVER STOP

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; does not expect to work in future:

X4617^=1/X5217^=1)

DEPENDS was allowed as an response to this question. However, in

processing, this answer was coded as a missing value and imputed.

X6739/X6749 contain the verbatim response when R originally answered

DEPENDS.

X6739(#1) Code reason \*DEPENDS

X6749(#2) 6. As long as health lasts, as long as I can

7. Until have children

8. Until return to school; until get married; until time

of other non-work activity

9. Until finances are adequate; depends on finances

10. Depends on interest, How I feel

11. Depends upon opportunities/economy

12. Never go back full time

13. Whenever find job, ASAP

14. Depends upon health, n.f.s.

15. After school, children

16. Only if need to, no plan

17. When R can turn over/sell the business

18. Depends on retirement age/incentives in future

19. Depends on what spouse does; depends on spouse/partner health

20. Depends on family needs/situation

21. Depends on whether part-time work is available

22. Depends on when licensed

25. Depends on availability of child care

0. Inap. (doing any work for pay: X4106^=0/X4706^=0;/

no spouse; does not expect to work in future:

X4617^=1/X5217^=1; original response not DEPENDS)

-----------------------------------------------------------------------------

INFORMATION LINKED FROM 2004 CURRENT POPULATION SURVEY BY OCCUPATION CODE

FOR PRIOR JOB

-----------------------------------------------------------------------------

X8171(#1) Recode: Unconditional mean wage for occupation group in 2004

X8172(#2)

Code number

0. Inap. (/no spouse; no 3-digit occupation code for past

job: X7405=0 and X7407=0 and X7409=0/X7415=0 and

X7417=0 and X7419=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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For each occupation group, regressions were run separately

for males and females of the log of annualized wages on a

constant, a spline on age (AGE, MAX(0, AGE-35),

MAX(0,AGE-55)), a dummy variable for part-time employment

(1 = working 20 or fewer hours per week), a dummy variable

for self-employment (1 = self-employed), a dummy for race

(1 = Hispanic or non-white), and dummy variables for years

of education (1 = : 12 years of education, some college or

an Associate's degree, Bachelor's degree, higher degree

than Bachelor's degree). If there were too few people in a CPS

3-digit occupation group, either the SCF case was matched to

a neighboring occupation group, or the match was made at the

level of the 2-digit occupation code. Some of the model

coefficients may be identically zero where there are too few

cases in the appropriate cells in the CPS data to identify

these coefficients; for example, a coefficient for the

[36,55) element of the age spline may be identically zero

if there are no CPS cases in that age group for the given

occupation.

X8125(#1) Recode: 10000 \* Intercept

X8126(#2)

Code number

0. Inap. (/no spouse; no 3-digit occupation code for past

job: X7405=0 and X7407=0 and X7409=0/X7415=0 and

X7417=0 and X7419=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X8119(#1) Recode: For age in [1, 35]: 10000 \* Coefficient of AGE

X8120(#2)

Code number

0. Inap. (/no spouse; no 3-digit occupation code for past

job: X7405=0 and X7407=0 and X7409=0/X7415=0 and

X7417=0 and X7419=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X8121(#1) Recode: For age in [36, 55]: 10000 \* Coefficient of MAX(0,AGE-35)

X8122(#2)

Code number

0. Inap. (/no spouse; no 3-digit occupation code for past

job: X7405=0 and X7407=0 and X7409=0/X7415=0 and

X7417=0 and X7419=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X8123(#1) Recode: For age in [55, 999]: 10000 \* Coefficient of MAX(0,AGE-55)

X8124(#2)

Code number

0. Inap. (/no spouse; no 3-digit occupation code for past

job: X7405=0 and X7407=0 and X7409=0/X7415=0 and

X7417=0 and X7419=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X8332(#1) Recode: 10000 \* Coefficient of dummy for part-time employment

X8333(#2)

Code number

0. Inap. (/no spouse; no 3-digit occupation code for past

job: X7405=0 and X7407=0 and X7409=0/X7415=0 and

X7417=0 and X7419=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X8334(#1) Recode: 10000 \* Coefficient of dummy for self-emlpoyment

X8335(#2)

Code number

0. Inap. (/no spouse; no 3-digit occupation code for past

job: X7405=0 and X7407=0 and X7409=0/X7415=0 and

X7417=0 and X7419=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X8336(#1) Recode: 10000 \* Coefficient of dummy for Hispanic or nonwhite

X8337(#2)

Code number

0. Inap. (/no spouse; no 3-digit occupation code for past

job: X7405=0 and X7407=0 and X7409=0/X7415=0 and

X7417=0 and X7419=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X8338(#1) Recode: 10000 \* Coefficient of dummy for 12 years of education

X8339(#2)

Code number

0. Inap. (/no spouse; no 3-digit occupation code for past

job: X7405=0 and X7407=0 and X7409=0/X7415=0 and

X7417=0 and X7419=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X8340(#1) Recode: 10000 \* Coefficient of dummy for some college or

X8341(#2) Associate's degree

Code number

0. Inap. (/no spouse; no 3-digit occupation code for past

job: X7405=0 and X7407=0 and X7409=0/X7415=0 and

X7417=0 and X7419=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X8342(#1) Recode: 10000 \* Coefficient of dummy for Bachelor's degree

X8343(#2)

Code number

0. Inap. (/no spouse; no 3-digit occupation code for past

job: X7405=0 and X7407=0 and X7409=0/X7415=0 and

X7417=0 and X7419=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X8344(#1) Recode: 10000 \* Coefficient of dummy for higher degree than

X8345(#2) Bachelor's degree

Code number

0. Inap. (/no spouse; no 3-digit occupation code for past

job: X7405=0 and X7407=0 and X7409=0/X7415=0 and

X7417=0 and X7419=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X8127(#1) Recode: 10000 \* Standard error log regression

X8128(#2)

Code number

0. Inap. (/no spouse; no 3-digit occupation code for past

job: X7405=0 and X7407=0 and X7409=0/X7415=0 and

X7417=0 and X7419=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X8129(#1) Recode: Annualized level of expected income from regression

X8130(#2) (corrected for non-zero expectation of error term for level)

Code number

0. Inap. (/no spouse; no 3-digit occupation code for past

job: X7405=0 and X7407=0 and X7409=0/X7415=0 and

X7417=0 and X7419=0)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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-----------------------------------------------------------------------------

CURRENT BENEFITS FROM SOCIAL SECURITY

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

GF

X5301 IN PERSON VERSION:

(SHOW CARD 10)

Are you (or your [husband/wife/partner]) currently

receiving Social Security benefit payments?

TELEPHONE VERSION:

Are you (or your [husband/wife/partner]) currently

receiving Social Security benefit payments?

INCLUDE RAILROAD RETIREMENT AS SOCIAL SECURITY

(DO NOT INCLUDE SUPPLEMENTAL SECURITY INCOME [SSI])

1. \*YES

5. \*NO

-----------------------------------------------------------------------------

#1 refers to Social Security benefits of head

#2 refers to Social Security benefits of spouse/partner

-----------------------------------------------------------------------------

X5303(#1) Who receives Social Security payments--you and your

X5308(#2) (husband/wife/partner) or only one of you? (Which one?)

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN

1. Checked

5. Not checked (including no spouse)

0. Inap. (not receiving Social Security benefits:

X5301^=1; no spouse/partner)

X5304(#1) Are the payments (you [personally] receive/your

X5309(#2) [husband/wife/partner] receives) for disability, or

survivors benefits?

IF R RECEIVES PAYMENTS FOR A DECEASED SPOUSE, CODE AS SURVIVORS

1. \*RETIREMENT

2. \*DISABILITY

3. \*SURVIVORS

6. Dependent's benefit

0. Inap. (not receiving Social Security benefits:

X5301^=1;/no spouse; not receiving Social Security:

X5303^=1/X5308^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODE 6 IS COMBINED WITH

CODE 3

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

How long (have you/has [he/she]) received these benefits?

X5305(#1) Code number of years

X5310(#2) -1. Less than a year

0. Inap. (not receiving Social Security benefits:

X5301^=1;/no spouse; not receiving Social Security:

X5303^=1/X5308^=1)

X7330(#1) Code age

X7331(#2) 0. Inap. (not receiving Social Security benefits:

X5301^=1;/no spouse; not receiving Social Security:

X5303^=1/X5308^=1)

X7734(#1) Code year (4 digits)

X7735(#2) 0. Inap. (not receiving Social Security benefits:

X5301^=1;/no spouse; not receiving Social Security:

X5303^=1/X5308^=1)

GF

X5306(#1) How much (do you [personally]/does [he/she]) receive each

X5311(#2) month or year?

WE WANT THE AMOUNT BEFORE DEDUCTIONS FOR MEDICARE

Code amount

-1. Nothing

0. Inap. (not receiving Social Security benefits:

X5301^=1;/no spouse; not receiving Social Security:

X5303^=1/X5308^=1)

X5307(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X5312(#2)

(And how often (do you/does [he/she]) receive that amount?)

Code frequency

4. \*Month

5. Quarter

6. \*Year

12. Every two months

-7. \*Other

0. Inap. (not receiving Social Security benefits:

X5301^=1;/no spouse; not receiving Social Security:

X5303^=1/X5308^=1)

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

CURRENT BENEFITS FROM PENSIONS

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

X5313 IN PERSON VERSION:

(SHOW CARD 10)

Are you or your (husband/wife/partner) currently

receiving any (other) type of retirement, pension, or

disability payments, or are you making withdrawals from a

pension or retirement account I have not already recorded?

TELEPHONE VERSION:

Are you or your (husband/wife/partner) currently

receiving any (other) type of retirement, pension, or

disability payments, or are you making withdrawals from a

pension or retirement acount I have not already recorded?

DO NOT INCLUDE SSI (SUPPLEMENTAL SECURITY INCOME) PAYMENTS.

1. \*YES

5. \*NO

X5314 (Not counting Social Security, how/How) many such benefits

or accounts (do you/does your [husband/wife/partner])

currently have?

(Please include the payments you told me [you are/you and your

{spouse/partner} are/your {spouse/partner}is] receiving

from a pension with a current employer).

Please do not include withdrawals from the IRAs and Keogh

accounts I have already recorded.

Code number

0. Inap. (no current pension benefits: X5313^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 7

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6700 Originally reported value of X5314 (see introduction)

Code number

0. Inap. (no current pension benefits: X5313^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 7

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

-----------------------------------------------------------------------------

#1 refers to the first current pension benefit

#2 refers to the second current pension benefit

#3 refers to the third current pension benefit

#4 refers to the fourth current pension benefit

#5 refers to the fifth current pension benefit

#6 refers to the sixth current pension benefit

#7 refers all remaining current pension benefits

-----------------------------------------------------------------------------

X5315(#1) For (this benefit/the first benefit), who is receiving

X5323(#2) these payments, you or your (husband/wife/partner)?

X5331(#3)

X5415(#4) 1. Head (Originally \*RESPONDENT)

X5423(#5) 2. \*SPOUSE/PARTNER

X5431(#6) 0. Inap. (no current pension benefits: X5313^=1;

no benefits: X5314<1/less than 2 benefits: X5314<2/

less than 3 benefits: X5314<3/less than 4 benefits:

X5314<4/less than 5 benefits: X5314<5/less than 6

benefits: X5314<6)

GF

X5316(#1) Is this a payment or account from a (current job,) past job, a

X5324(#2) disability or military benefit, former spouse's pension, or

X5332(#3) something else?

X5416(#4)

X5424(#5) 1. \*Current job pension of R or spouse/partner

X5432(#6) 2. \*Past job pension of R or spouse/partner; (except military)

3. \*Disability

4. \*Military; (includes retirement or disability)

5. \*Pension of former spouse

10. Pension through other family member

11. Union pension

15. Foreign government pension

-7. \*Other

0. Inap. (no current pension benefits: X5313^=1;

no benefits: X5314<1/less than 2 benefits: X5314<2/

less than 3 benefits: X5314<3/less than 4 benefits:

X5314<4/less than 5 benefits: X5314<5/less than 6

benefits: X5314<6)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODES 2, 4, 11, AND 15 ARE

COMBINED WITH CODE 1

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

How long have you received these benefits?

How long has (he/she) received these benefits?

X5317(#1) Code number of years

X5325(#2) -1. Less than one year

X5333(#3) 0. Inap. (no current pension benefits: X5313^=1;

X5417(#4) no benefits: X5314<1/less than 2 benefits: X5314<2/

X5425(#5) less than 3 benefits: X5314<3/less than 4 benefits:

X5433(#6) X5314<4/less than 5 benefits: X5314<5/less than 6

benefits: X5314<6)

X7332(#1) Code age

X7333(#2) 0. Inap. (no current pension benefits: X5313^=1;

X7334(#3) no benefits: X5314<1/less than 2 benefits: X5314<2/

X7335(#4) less than 3 benefits: X5314<3/less than 4 benefits:

X7336(#5) X5314<4/less than 5 benefits: X5314<5/less than 6

X7337(#6) benefits: X5314<6)

X7736(#1) Code year (4 digits)

X7738(#2) 0. Inap. (no current pension benefits: X5313^=1;

X7740(#3) no benefits: X5314<1/less than 2 benefits: X5314<2/

X7742(#4) less than 3 benefits: X5314<3/less than 4 benefits:

X7744(#5) X5314<4/less than 5 benefits: X5314<5/less than 6

X7746(#6) benefits: X5314<6)

X6461(#1) Is this pension currently an account plan, such as a 401(k),

X6466(#2) where you could take the whole balance as one payment if

X6471(#3) you wanted to?

X6476(#4)

X6481(#5) INTERVIEWER: IF R SAYS THAT IT IS AN ACCOUNT THAT WAS

X6486(#6) CONVERTED TO AN ANNUITY AT RETIREMENT, CODE "NO."

1. \*YES

5. \*NO

0. Inap. (no current pension benefits: X5313^=1;

no benefits: X5314<1/less than 2 benefits: X5314<2/

less than 3 benefits: X5314<3/less than 4 benefits:

X5314<4/less than 5 benefits: X5314<5/less than 6

benefits: X5314<6; disabilty benefits: X5316=3/

X5324=3/X5332=3/X5416=3/X5424=3/X5432=3)

X6462(#1) What is the current balance in this account?

X6467(#2)

X6472(#3) Code amount

X6477(#4) 0. Inap. (no current pension benefits: X5313^=1;

X6482(#5) no benefits: X5314<1/less than 2 benefits: X5314<2/

X6487(#6) less than 3 benefits: X5314<3/less than 4 benefits:

X5314<4/less than 5 benefits: X5314<5/less than 6

benefits: X5314<6; disabilty benefits: X5316=3/

X5324=3/X5332=3/X5416=3/X5424=3/X5432=3;

not an account plan: X6461=5/X6466=5/X6471=5/

X6476=5/X6481=5/X6486=5)

GF

X6933(#1) How is the account invested? Is it all in stocks, all

X6937(#2) in interest earning assets, is it split between these,

X6941(#3) or something else?

X6945(#4)

X6949(#5) IF R SAY "MUTUAL FUND," PROBE FOR WHETHER IT IS A STOCK

X6953(#6) FUND, A BOND FUND, OR ONE SPLIT OVER BOTH TYPES

1. \*ALL IN STOCKS

2. \*ALL IN INTEREST EARNING ASSETS/BONDS

3. \*SPLIT

4. Real estate

5. Hedge fund

6. Annuities

8. Mineral rights

-7. \*OTHER

0. Inap. (no current pension benefits: X5313^=1;

no benefits: X5314<1/less than 2 benefits: X5314<2/

less than 3 benefits: X5314<3/less than 4 benefits:

X5314<4/less than 5 benefits: X5314<5/less than 6

benefits: X5314<6; disabilty benefits: X5316=3/

X5324=3/X5332=3/X5416=3/X5424=3/X5432=3;

not an account plan: X6461=5/X6466=5/X6471=5/

X6476=5/X6481=5/X6486=5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODES 4, 5, 6, 7 AND 8 ARE

COMBINED WITH CODE -7

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6934(#1) About what percent is in stocks?

X6938(#2)

X6942(#3) Code percent \* 100

X6946(#4) 0. Inap. (no current pension benefits: X5313^=1;

X6950(#5) no benefits: X5314<1/less than 2 benefits: X5314<2/

X6954(#6) less than 3 benefits: X5314<3/less than 4 benefits:

X5314<4/less than 5 benefits: X5314<5/less than 6

benefits: X5314<6; ; disabilty benefits: X5316=3/

X5324=3/X5332=3/X5416=3/X5424=3/X5432=3;

not an account plan: X6461=5/X6466=5/X6471=5/

X6476=5/X6481=5/X6486=5; investment not split:

X6933^=3/X6937^=3/X6941^=3/X6945^=3/

X6949^=3/X6953^=3/)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, ROUNDED TO NEAREST 500 IF

BETWEEN 250 AND 9750 INCLUSIVE, OTHERWISE IF > 0

ROUNDED TO NEAREST 100 WITH A TOP-CODE AT 9900

AND A BOTTOM-CODE AT 100 FOR THOSE VALUES ROUNDED

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6935(#1) Is any of this stock in a company where (you/your

X6939(#2) [husband/wife/partner]) worked?

X6943(#3)

X6947(#4) 1. \*YES

X6951(#5) 5. \*NO

X6955(#6) 0. Inap. (no current pension benefits: X5313^=1;

no benefits: X5314<1/less than 2 benefits: X5314<2/

less than 3 benefits: X5314<3/less than 4 benefits:

X5314<4/less than 5 benefits: X5314<5/less than 6

benefits: X5314<6; ; disabilty benefits: X5316=3/

X5324=3/X5332=3/X5416=3/X5424=3/X5432=3;

not an account plan: X6461=5/X6466=5/X6471=5/

X6476=5/X6481=5/X6486=5; no investment in stocks:

X6933^=1 or 3/X6937^=1 or 3/X6941^=1 or 3/

X6945^=1 or 3/X6949^=1 or 3/X6953^=1 or 3)

X6464(#1) Over the past year, how much did (you/your

X6469(#2) [husband/wife/partner]) take from this account?

X6474(#3)

X6479(#4) Code amount

X6484(#5) -1. Nothing

X6489(#6) 0. Inap. (no current pension benefits: X5313^=1;

no benefits: X5314<1/less than 2 benefits: X5314<2/

less than 3 benefits: X5314<3/less than 4 benefits:

X5314<4/less than 5 benefits: X5314<5/less than 6

benefits: X5314<6; disabilty benefits: X5316=3/

X5324=3/X5332=3/X5416=3/X5424=3/X5432=3;

not an account plan: X6461=5/X6466=5/X6471=5/

X6476=5/X6481=5/X6486=5)

X6465(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X6470(#2) (And how often is that amount received?)

X6475(#3)

X6480(#4) Code frequency

X6485(#5) 4. \*Month

X6490(#6) 5. Quarter

6. \*Year

-1. Nothing

-7. \*Other

0. Inap. (no current pension benefits: X5313^=1;

no benefits: X5314<1/less than 2 benefits: X5314<2/

less than 3 benefits: X5314<3/less than 4 benefits:

X5314<4/less than 5 benefits: X5314<5/less than 6

benefits: X5314<6; disabilty benefits: X5316=3/

X5324=3/X5332=3/X5416=3/X5424=3/X5432=3;

not an account plan: X6461=5/X6466=5/X6471=5/

X6476=5/X6481=5/X6486=5)

X6936(#1) Before you started receiving benefits, did (you/your

X6940(#2) [husband/wife/partner]) have an option to choose (regular

X6944(#3) payments for life /a lump sum distribution instead of

X6948(#4) regular payments)?

X6952(#5) IF R WAS NOT ALLOWED A CHOICE, CODE NO.

X6956(#6)

1. \*YES

5. \*NO

0. Inap. (no current pension benefits: X5313^=1;

no benefits: X5314<1/less than 2 benefits: X5314<2/

less than 3 benefits: X5314<3/less than 4 benefits:

X5314<4/less than 5 benefits: X5314<5/less than 6

benefits: X5314<6; disabilty benefits: X5316=3/

X5324=3/X5332=3/X5416=3/X5424=3/X5432=3)

X5318(#1) How much is received each month or year?

X5326(#2)

X5334(#3) Code amount

X5418(#4) 0. Inap. (no current pension benefits: X5313^=1;

X5426(#5) no benefits: X5314<1/less than 2 benefits: X5314<2/

X5434(#6) less than 3 benefits: X5314<3/less than 4 benefits:

X5314<4/less than 5 benefits: X5314<5/less than 6

benefits: X5314<6; an account plan: X6461=1/X6466=1/

X6471=1/X6476=1/X6481=1/X6486=1)

X5319(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X5327(#2) (And how often is that amount received?)

X5335(#3)

X5419(#4) Code frequency

X5427(#5) 1. Day

X5435(#6) 2. Week

3. Every two weeks

4. \*Month

5. Quarter

6. \*Year

8. Lump sum; one payment only/in total

11. Twice per year; every six months

12. Every two months

14. By the piece/job

18. Hour

22. Varies

31. Twice a month

-7. \*Other

0. Inap. (no current pension benefits: X5313^=1;

no benefits: X5314<1/less than 2 benefits: X5314<2/

less than 3 benefits: X5314<3/less than 4 benefits:

X5314<4/less than 5 benefits: X5314<5/less than 6

benefits: X5314<6; an account plan: X6461=1/X6466=1/

X6471=1/X6476=1/X6481=1/X6486=1)

X5320(#1) Has this payment been increased when the cost of living has

X5328(#2) increased?

X5336(#3)

X5420(#4) CODE "YES" EVEN IF ADJUSTMENTS ARE NOT REGULAR.

X5428(#5)

X5436(#6) 1. \*YES

5. \*NO

0. Inap. (no current pension benefits: X5313^=1;

no benefits: X5314<1/less than 2 benefits: X5314<2/

less than 3 benefits: X5314<3/less than 4 benefits:

X5314<4/less than 5 benefits: X5314<5/less than 6

benefits: X5314<6; an account plan: X6461=1/X6466=1/

X6471=1/X6476=1/X6481=1/X6486=1)

X5322(#1) If you were to die, what percent of this payment would your

X5330(#2) (husband/wife/partner) continue to receive or would the

X5338(#3) payments stop?

X5422(#4)

X5430(#5) If your (husband/wife/partner) were to die, what percent of

X5438(#6) this payment would you continue to receive or would the

payments stop?

Code percent \* 100

-1. \*Stop

-2. Start at a later time, no indication of reduced benefit

-3. Start at a later time, indication of reduced benefit

-4. Lump sum payout

-5. Full amount for limited period

-6. Full amount, no time limit or time period not specified

-7. Other arrangement

0. Inap. (no current pension benefits: X5313^=1;

no benefits: X5314<1/less than 2 benefits: X5314<2/

less than 3 benefits: X5314<3/less than 4 benefits:

X5314<4/less than 5 benefits: X5314<5/less than 6

benefits: X5314<6; an account plan: X6461=1/X6466=1/

X6471=1/X6476=1/X6481=1/X6486=1; no spouse or partner)

X6957(#7) Thinking about the type of plans that accumulate a balance,

what is the total balance you (or your [husband/wife/partner])

have in all other such plans from which you make withdrawals?

IF THERE ARE NO PLANS OF THIS TYPE, CODE ZERO.

Code amount

-1. Nothing

0. Inap. (no current pension benefits: X5313^=1; fewer

than 7 benefits: X5314<7)

X8467(#7) Original amount of plans that accumulate a balance,

for Rs who did not provide complete information within the

grid structure (see introduction).

Code amount

-1. Nothing

0. Inap. (no current pension benefits: X5313^=1; fewer

than 7 benefits: X5314<7)

X6958(#7) Thinking about the type of plans that give regular

payments, how much do (you/you and your [husband/wife/partner])

receive per month or year from all other such plans?

IF THERE ARE NO PLANS OF THIS TYPE, CODE ZERO.

Code amount

-1. Nothing

0. Inap. (no current pension benefits: X5313^=1; fewer

than 7 benefits: X5314<7)

X8468(#7) Original amount of plans that pay a regular benefit

for Rs who did not provide complete information within the

grid structure (see introduction).

Code amount

-1. Nothing

0. Inap. (no current pension benefits: X5313^=1; fewer

than 7 benefits: X5314<7)

X6959(#7) And how often is that amount received?

1. Day

2. Week

3. Every two weeks

4. \*Month

5. Quarter

6. \*Year

8. Lump sum; one payment only/in total

11. Twice per year; every six months

12. Every two months

14. By the piece/job

18. Hour

22. Varies

31. \*Twice a month

-1. Nothing

-7. \*Other

0. Inap. (no current pension benefits: X5313^=1; fewer

than 7 benefits: X5314<7)

X8469(#7) Original value of frequency.

1. Day

2. Week

3. Every two weeks

4. \*Month

5. Quarter

6. \*Year

8. Lump sum; one payment only/in total

11. Twice per year; every six months

12. Every two months

14. By the piece/job

18. Hour

22. Varies

31. \*Twice a month

-1. Nothing

-7. \*Other

0. Inap. (no current pension benefits: X5313^=1; fewer

than 7 benefits: X5314<7)

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

CASH SETTLEMENTS FROM PAST JOBS

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

X5501 Have you (or your [husband/wife/partner]) ever received a

lump-sum distribution or settlement from a pension or

retirement plan of a previous job? Please include such

settlements even if they were "rolled over" into a new

pension plan, or a Keogh or IRA.

IF YES: Do not include severance pay or worker's compensation.

1. \*YES

5. \*NO

X5502 (Including the IRA roll-overs you told me about earlier,

how/How) many such lump-sum distributions or settlements

have you (or your [husband/wife/partner]) received?

Code number

0. Inap. (no setlements: X5501^=1)

X6701 Originally reported value of X5502 (see introduction)

Code number

0. Inap. (no setlements: X5501^=1)

-----------------------------------------------------------------------------

#1 refers to first settlement

#2 refers to second settlement

#3 refers to third settlement

#4 refers to fourth settlement

#5 refers to fifth settlement

#6 refers to sixth settlement

#7 refers to all remaining settlements

-----------------------------------------------------------------------------

X5503(#1) Who received (this/the first) settlement, you or your

X5506(#2) (husband/wife/partner)?

X5509(#3)

X5512(#4) 1. Head (Originally \*Respondent)

X5515(#5) 2. \*Spouse/partner

X5518(#6) 0. Inap. (no setlements: X5501^=1; no settlements: X5502<1/

less than 2 settlements: X5502<2/less than 3 settlements:

X5502<3/less than 4 settlements: X5502<4/less than 5

settlements: X5502<5/less than 6 settlements: X5502<6)

X5504(#1) What was the amount of this (first) cash settlement?

X5507(#2)

X5510(#3) Code amount

X5513(#4) 0. Inap. (no setlements: X5501^=1; no settlements: X5502<1/

X5516(#5) less than 2 settlements: X5502<2/less than 3 settlements:

X5519(#6) X5502<3/less than 4 settlements: X5502<4/less than 5

settlements: X5502<5/less than 6 settlements: X5502<6)

In what year was (this/the first) cash settlement received?

X5505(#1) Code year (4 digits)

X5508(#2) 0. Inap. (no setlements: X5501^=1; no settlements: X5502<1/

X5511(#3) less than 2 settlements: X5502<2/less than 3 settlements:

X5514(#4) X5502<3/less than 4 settlements: X5502<4/less than 5

X5517(#5) settlements: X5502<5/less than 6 settlements: X5502<6)

X5520(#6)

X7338(#1) Code age

X7340(#2) 0. Inap. (no setlements: X5501^=1; no settlements: X5502<1/

X7342(#3) less than 2 settlements: X5502<2/less than 3 settlements:

X7344(#4) X5502<3/less than 4 settlements: X5502<4/less than 5

X7346(#5) settlements: X5502<5/less than 6 settlements: X5502<6)

X5521(#6)

X7339(#1) Code number of years

X7341(#2) -1. Less than a year

X7343(#3) 0. Inap. (no setlements: X5501^=1; no settlements: X5502<1/

X7345(#4) less than 2 settlements: X5502<2/less than 3 settlements:

X7347(#5) X5502<3/less than 4 settlements: X5502<4/less than 5

X5522(#6) settlements: X5502<5/less than 6 settlements: X5502<6)

X6806(#7) How much in total did you (and your [husband/wife/partner])

receive from all other such settlements?

Code amount

0. Inap. (no setlements: X5501^=1; no settlements: X5502<1/

less than 2 settlements: X5502<2/less than 3 settlements:

X5502<3/less than 4 settlements: X5502<4/less than 5

settlements: X5502<5/fewer than 6 settlements: X5502<6)

X8457(#7) Original value of remaining total for Rs who did not

provide complete informtion within the grid structure (see

introduction).

Code amount

0. Inap. (no setlements: X5501^=1; did not break off early

in grid)

What did (you do/you and your[husband/wife/partner] do)

with the money from (this/these) settlement(s)

-- did you roll it over into an IRA or another employer's

pension plan, did you invest it in some other way, did you

spend it on durables, did you spend it in some other way,

or did you do something else?

"DURABLES" INCLUDE CARS, FURNITURE, WASHING MACHINES, STEREOS, ETC.

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN

X6775 \*Rolled over into IRA/Rolled over into annuity

X6960 \*Rolled over into another employer's pension plan

X6776 \*Other investment

X6777 \*Durables

X6778 \*Other purchases

X6779 \*OTHER

1. Checked

5. Not checked

6. Paid bills/debts/living expenses (for X6779 only)

10. Moved to a new location (for X6779 only)

12. Education (for X6779 only)

13. Divorce settlement (for X6779 only)

14. Purchased home (for X6779 only)

0. Inap. (no setlements: X5501^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODE 13 IS COMBINED WITH

CODE 6

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

FUTURE PENSION BENEFITS

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

X5601 IN PERSON VERSION:

(SHOW CARD 10)

During the interview, we have covered retirement assets

including Keoghs and IRAs, annuities, (current job

pensions,) and benefits that may currently be received

from Social Security or pensions from past work.

To complete the picture now, please tell me, have you (and

your [husband/wife/partner]) earned rights to any other

pensions or retirement accounts from a previous employer

that you (or your [husband/wife/partner]) will receive or

draw on in the future.

TELEPHONE VERSION:

During the interview, we have covered retirement assets

including Keoghs and IRAs, annuities, (current job

pensions,) and benefits that may currently be received

from Social Security or pensions from past work.

To complete the picture now, please tell me, have you (and

your [husband/wife/partner]) earned rights to any other

pensions or retirement accounts from a previous employer

that you (or your [husband/wife/partner]) will receive or

draw on in the future.

DO NOT INCLUDE PENSIONS R MIGHT GET FROM FUTURE JOBS UNLESS

RIGHTS TO THE PENSION ARE ALREADY EARNED.

1. \*YES

5. \*NO

X5602 How many such benefits do you (or your [husband/wife/partner])

expect to receive in the future?

Code number

0. Inap. (no future pensions: X5601^=1)

X6702 Originally reported value of X5602 (see introduction)

Code number

0. Inap. (no future pensions: X5601^=1)

-----------------------------------------------------------------------------

#1 refers to first future pension benefit

#2 refers to second future pension benefit

#3 refers to third future pension benefit

#4 refers to fourth future pension benefit

#5 refers to fifth future pension benefit

#6 refers to sixth future pension benefit

#7 refers to all remaining future pension benefits

-----------------------------------------------------------------------------

X5606(#1) Who expects to receive (this/the largest) benefit?

X5614(#2)

X5622(#3) (IF R ANSWERS DK: Tell me about your benefits first.)

X5630(#4)

X5638(#5) (WE DO NOT CARE WHICH PLAN IS LARGEST, TAKE ANY PLAN.)

X5646(#6)

1. Head (Originally \*Respondent)

2. \*Spouse/partner

0. Inap. (no future pensions: X5601^=1; no future

benefits: X5602<1/ less than 2 future benefits:

X5602<2/less than 3 benefits X5602<3/less than 4

benefits: X5602<4/less than 5 benefits: X5602<5/

less than 6 benefits: X5602<6)

GF

X7768(#1) Is this benefit from a past job, the military, a former

X7769(#2) spouse's pension, or something else?

X7770(#3)

X7771(#4)

X7772(#5) 1. \*Past job pension of R or S/P

X7773(#6) 2. \*Military

3. \*Former spouse's pension

-7. \*Other

0. Inap. (no future pensions: X5601^=1; no future

benefits: X5602<1/ less than 2 future benefits:

X5602<2/less than 3 benefits X5602<3/less than 4

benefits: X5602<4/less than 5 benefits: X5602<5/

less than 6 benefits: X5602<6)

X6961(#1) Did (you/your [husband/wife/partner]) have or will (you/[he/she])

X6967(#2) have an option to receive the payments either as a lump-sum

X6973(#3) distribution or as regular payments for life?

X6979(#4)

X6985(#5) 1. \*YES

X6991(#6) 5. \*NO

0. Inap. (no future pensions: X5601^=1; no future

benefits: X5602<1/ less than 2 future benefits:

X5602<2/less than 3 benefits X5602<3/less than 4

benefits: X5602<4/less than 5 benefits: X5602<5/

less than 6 benefits: X5602<6)

X5603(#1) About (this/the largest) benefit, is it a type of plan

X5611(#2) that has an account balance, is it a plan that will pay out

X5619(#3) a regular income for life after retirement, or is it a

X5627(#4) mixture of these two types?

X5635(#5)

X5643(#6)

1. \*Regular income for life

2. \*Account

3. \*Mixture

0. Inap. (no future pensions: X5601^=1; no future

benefits: X5602<1/ less than 2 future benefits:

X5602<2/less than 3 benefits X5602<3/less than 4

benefits: X5602<4/less than 5 benefits: X5602<5/

less than 6 benefits: X5602<6)

X7348(#1) When (you retire/your [husband/wife/partner] retires), will

X7350(#2) (you/[he/she]) receive the money in the account

X7352(#3) as a lump sum, will (you/[he/she]) receive regular payments

X7354(#4) as long as (you live/[he/she] lives), will (you/[he/she])

X7356(#5) receive a payment level that (you decide/[he/she] decides,

X7358(#6) or something else?

1. \*Lump sum

2. \*Regular payments for life

3. \*Payment level you decide

4. Payments for a set period

-7. \*Something else

0. Inap. (no future pensions: X5601^=1; no future

benefits: X5602<1/ less than 2 future benefits:

X5602<2/less than 3 benefits X5602<3/less than 4

benefits: X5602<4/less than 5 benefits: X5602<5/

less than 6 benefits: X5602<6; not an account-type

or mixture plan: X5603=1/X5611=1/X5619=1/X5627=1/X5635=1/

X5643=1)

X5604(#1) How much is in the account now?

X5612(#2)

X5620(#3) Code amount

X5628(#4) -1. Nothing

X5636(#5) 0. Inap. (no future pensions: X5601^=1; no future

X5644(#6) benefits: X5602<1/ less than 2 future benefits:

X5602<2/less than 3 benefits X5602<3/less than 4

benefits: X5602<4/less than 5 benefits: X5602<5/

less than 6 benefits: X5602<6; not an account-type

or mixture plan: X5603=1/X5611=1/X5619=1/X5627=1/X5635=1/

X5643=1)

X5608(#1) About how much (do you/does [he/she]) expect the payments

X5616(#2) to be?

X5624(#3)

X5632(#4) Code amount

X5640(#5) -1. Nothing

X5648(#6) 0. Inap. (no future pensions: X5601^=1; no future

benefits: X5602<1/ less than 2 future benefits:

X5602<2/less than 3 benefits X5602<3/less than 4

benefits: X5602<4/less than 5 benefits: X5602<5/

less than 6 benefits: X5602<6; lump sum benefit:

X7348=1/X7350=1/X7352=1/X7354=1/X7356=1/X7358=1)

X5609(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X5617(#2) (And how often do you expect to receive that amount?)

X5625(#3)

X5633(#4) Code frequency

X5641(#5) 1. Day

X5649(#6) 2. \*Week

3. \*Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only/in total

11. \*Twice per year; every six months

12. Every two months

14. By the piece/job

18. Hour

22. Varies

31. \*Twice a month

-1. Nothing

-7. \*Other

0. Inap. (no future pensions: X5601^=1; no future

benefits: X5602<1/ less than 2 future benefits:

X5602<2/less than 3 benefits X5602<3/less than 4

benefits: X5602<4/less than 5 benefits: X5602<5/

less than 6 benefits: X5602<6; lump sum benefit:

X7348=1/X7350=1/X7352=1/X7354=1/X7356=1/X7358=1)

When (do you/does your [spouse/partner]) expect to receive

this pension?

X7751(#1) Code number of years

X7752(#2) -1. Less than a year

X7753(#3) 0. Inap. (no future pensions: X5601^=1; no future

X7754(#4) benefits: X5602<1/ less than 2 future benefits:

X7755(#5) X5602<2/less than 3 benefits X5602<3/less than 4

X7756(#6) benefits: X5602<4/less than 5 benefits: X5602<5/

less than 6 benefits: X5602<6)

X5607(#1) Code age

X5615(#2) 0. Inap. (no future pensions: X5601^=1; no future

X5623(#3) benefits: X5602<1/ less than 2 future benefits:

X5631(#4) X5602<2/less than 3 benefits X5602<3/less than 4

X5639(#5) benefits: X5602<4/less than 5 benefits: X5602<5/

X5647(#6) less than 6 benefits: X5602<6)

X7349(#1) Code year (4 digits)

X7351(#2) 0. Inap. (no future pensions: X5601^=1; no future

X7353(#3) benefits: X5602<1/ less than 2 future benefits:

X7355(#4) X5602<2/less than 3 benefits X5602<3/less than 4

X7357(#5) benefits: X5602<4/less than 5 benefits: X5602<5/

X7359(#6) less than 6 benefits: X5602<6)

GF

X6962(#1) How is the money in this account invested? Is it all in

X6968(#2) stocks, all in interest-earning assets, is it split between

X6974(#3) these, or something else?

X6980(#4)

X6986(#5) IF R SAY "MUTUAL FUND," PROBE FOR WHETHER IT IS A STOCK

X6992(#6) FUND, A BOND FUND, OR ONE SPLIT OVER BOTH TYPES

1. \*ALL IN STOCKS

2. \*ALL IN INTEREST EARNING ASSETS/BONDS

3. \*SPLIT

4. Real estate

5. Hedge fund

6. Annuities

8. Mineral rights

-7. \*OTHER

0. Inap. (no future pensions: X5601^=1; no future

benefits: X5602<1/ less than 2 future benefits:

X5602<2/less than 3 benefits X5602<3/less than 4

benefits: X5602<4/less than 5 benefits: X5602<5/

less than 6 benefits: X5602<6; not an account-type

or mixture plan: X5603=1/X5611=1/X5619=1/X5627=1/X5635=1/

X5643=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODES 4, 5, 6, 7 AND 8 ARE

COMBINED WITH CODE -7

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6963(#1) About what percent is in stocks?

X6969(#2)

X6975(#3) Code percent \* 100

X6981(#4) 0. Inap. (no future pensions: X5601^=1; no future

X6987(#5) benefits: X5602<1/ less than 2 future benefits:

X6993(#6) X5602<2/less than 3 benefits X5602<3/less than 4

benefits: X5602<4/less than 5 benefits: X5602<5/

less than 6 benefits: X5602<6; not an account-type

or mixture plan: X5603=1/X5611=1/X5619=1/X5627=1/X5635=1/

X5643=1; investment not split: X6962^=3/X6968^=3/

X6974^=3/X6980^=3/X6986^=3/X6992^=3/)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, ROUNDED TO NEAREST 500 IF

BETWEEN 250 AND 9750 INCLUSIVE, OTHERWISE IF > 0

ROUNDED TO NEAREST 100 WITH A TOP-CODE AT 9900

AND A BOTTOM-CODE AT 100 FOR THOSE VALUES ROUNDED

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6964(#1) Is any of this stock in a company where (you/your

X6970(#2) [husband/wife/partner]) worked?

X6976(#3)

X6982(#4) 1. \*YES

X6988(#5) 5. \*NO

X6994(#6) 0. Inap. (no future pensions: X5601^=1; no future

benefits: X5602<1/ less than 2 future benefits:

X5602<2/less than 3 benefits X5602<3/less than 4

benefits: X5602<4/less than 5 benefits: X5602<5/

less than 6 benefits: X5602<6; not an account-type

or mixture plan: X5603=1/X5611=1/X5619=1/X5627=1/X5635=1/

X5643=1; no investment in stocks: X6962^=1 or

3/X6968^=1 or 3/X6974^=1 or 3/X6980^=1 or 3/X6986^=1

or 3/X6992^=1 or 3)

X6965(#1) Over the past year, how much did (you/your [husband/wife/partner])

X6971(#2) take from this account?

X6977(#3)

X6983(#4) Code amount

X6989(#5) -1. Nothing

X6995(#6) 0. Inap. (no future pensions: X5601^=1; no future

benefits: X5602<1/ less than 2 future benefits:

X5602<2/less than 3 benefits X5602<3/less than 4

benefits: X5602<4/less than 5 benefits: X5602<5/

less than 6 benefits: X5602<6; not an account-type

or mixture plan: X5603=1/X5611=1/X5619=1/X5627=1/X5635=1/

X5643=1)

X6966(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X6972(#2) (And how often is that amount received?)

X6978(#3)

X6984(#4) Code frequency

X6990(#5) 1. Day

X6996(#6) 2. Week

3. Every two weeks

4. \*Month

5. Quarter

6. \*Year

8. Lump sum; one payment only/in total

11. Twice per year; every six months

12. Every two months

14. By the piece/job

18. Hour

22. Varies

31. Twice a month

-7. \*Other

0. Inap. (no future pensions: X5601^=1; no future

benefits: X5602<1/ less than 2 future benefits:

X5602<2/less than 3 benefits X5602<3/less than 4

benefits: X5602<4/less than 5 benefits: X5602<5/

less than 6 benefits: X5602<6; not an account-type

or mixture plan: X5603=1/X5611=1/X5619=1/X5627=1/X5635=1/

X5643=1)

X6997(#7) Thinking about all remaining plans that accumulate a

balance, what is the total current balance in those plans?

IF THERE ARE NO PLANS OF THIS TYPE, CODE ZERO.

Code amount

-1. Nothing

0. Inap. (no future pensions: X5601^=1; fewer than

seven future benefits)

X8470(#7) Original value of all remaining other pension plans

with an account balance for Rs who did not provide complete

information within the grid structure (see introduction).

Code amount

-1. Nothing

0. Inap. (no future pensions: X5601^=1; did not break off

early in grid)

X6998(#7) Thinking about all the remaining plans where you (and your

[husband/wife/partner]) expect to receive regular payments

in the future, how much in total do you (or your

[husband/wife/partner] expect to receive?

IF THERE ARE NO PLANS OF THIS TYPE, CODE ZERO.

Code amount

-1. Nothing

0. Inap. (no future pensions: X5601^=1; fewer than

seven future benefits)

X8471(#7) Original value of all remaining future pension benefits

with regular payment for Rs who did not provide complete

information within the grid structure (see introduction).

Code amount

-1. Nothing

0. Inap. (no future pensions: X5601^=1; did not break off

early in grid)

X6999(#7) (And how often do you expect to receive that amount?)

1. Day

2. \*Week

3. \*Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only/in total

11. \*Twice per year; every six months

12. Every two months

14. By the piece/job

18. Hour

22. Varies

31. \*Twice a month

-1. Nothing

-7. \*Other

0. Inap. (no future pensions: X5601^=1; fewer than

seven future benefits)

X8472(#7) Original value of frequency.

1. Day

2. \*Week

3. \*Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only/in total

11. \*Twice per year; every six months

12. Every two months

14. By the piece/job

18. Hour

22. Varies

31. \*Twice a month

-1. Nothing

-7. \*Other

0. Inap. (no future pensions: X5601^=1; fewer than

seven future benefits)

GF

X7360 (Is this pension/Are any of these pensions) part of an IRA,

Keogh, or other pension plan you already told me about?

1. \*Yes, IRA/Keogh

2. \*Yes, pension

3. Pension(s) remain(s) after removing plans reported earlier

5. \*No

6. Initially reported "YES, IRA/Keogh," but no apparent link

7. Initially reported "YES, PENSION," but no apparent link

0. Inap. (no future pensions: X5601^=1)

NOTE: All initial YES responses have been reconciled with

the IRA/Keogh or pension data and edited out of this grid.

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INCOME, SUPPORT, ALIMONY

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

We have covered many sources of income in this interview.

Because of the importance of income in this study, we would

like to make sure we have the best overview of the sources

of income you (and your family living here) received in 2003.

X5701 Did you (or anyone else) have income from wages and salaries?

IRS FORM 1040 LINE NUMBER: 7

WE WANT TOTAL INCOME FOR THE YEAR, NOT MONTHLY INCOME.

1. \*YES

5. \*NO

X5702 In total, what was your (family's) annual income from

wages and salaries in 2003, before deductions for taxes and

anything else?

INCLUDE OVERTIME, BONUSES, AND TIPS.

IRS FORM 1040 LINE NUMBER: 7

Code amount

0. Inap. (no wage income: X5701^=1)

X5703 Did you (or anyone else) have income or losses from a

professional practice, business, limited partnership, or

farm in 2003 before deductions for taxes and anything else?

IRS FORM 1040 LINE NUMBER: 12,18

WE WANT TOTAL INCOME FOR THE YEAR, NOT MONTHLY INCOME.

1. \*YES

5. \*NO

X5704 In total, what was your (family's) net annual income from

a professional practice, business, limited partnership, or

farm in 2003, before deductions for taxes and anything else?

IRS FORM 1040 LINE NUMBER: 12,18

Code amount

-1. Nothing

-2. Negative value inferred from data on business

-9. Other negative value and x5729 negative (public

data set only)

0. Inap. (no business income: X5703^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, NEGATIVE VALUES INCLUDING

-2 HAVE BEEN SET TO -9 WHEN X5729 IS NEGATIVE

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X5705 Did you (or anyone else) have income from

non-taxable investments such as municipal bonds?

IRS FORM 1040 LINE NUMBER: 8b

WE WANT TOTAL INCOME FOR THE YEAR, NOT MONTHLY INCOME.

1. \*YES

5. \*NO

X5706 In total, what was your (family's) annual income from

non-taxable investments such as municipal bonds in 2003,

before deductions for taxes and anything else?

IRS FORM 1040 LINE NUMBER: 8b

Code amount

0. Inap. (no non-taxable income: X5705^=1)

X5707 Did you (or anyone else) have any other interest income?

IRS FORM 1040 LINE NUMBER: 8a

WE WANT TOTAL INCOME FOR THE YEAR, NOT MONTHLY INCOME.

1. \*YES

5. \*NO

X5708 In total, what was your (family's) annual income from

other interest in 2003, before deductions for taxes and

anything else?

IRS FORM 1040 LINE NUMBER: 8a

Code amount

0. Inap. (no other interest income: X5707^=1)

X5709 Did you (or anyone else) have income from dividends?

IRS FORM 1040 LINE NUMBER: 9a

WE WANT TOTAL INCOME FOR THE YEAR, NOT MONTHLY INCOME.

1. \*YES

5. \*NO

X5710 In total, what was your (family's) annual income from

dividends in 2003, before deductions for taxes and

anything else?

IRS FORM 1040 LINE NUMBER: 9a

Code amount

0. Inap. (no dividend income: X5709^=1)

X5711 Did you (or anyone else) have income or losses from

net gains or losses from the sale of stocks, bonds, or real

estate?

IRS FORM 1040 LINE NUMBER: 13a,14

WE WANT TOTAL INCOME FOR THE YEAR, NOT MONTHLY INCOME.

1. \*YES

5. \*NO

X5712 In total, what was your (family's) annual income from

net gains or losses from mutual funds or from the sale of

stocks, bonds, or real estate in 2003, before deductions

for taxes and anything else?

IRS FORM 1040 LINE NUMBER: 13a,14

Code amount

-1. Nothing

0. Inap. (no capital gains or losses: X5711^=1)

X5713 Did you (or anyone else) have income from net rent, trusts,

or royalties from any other investment or business?

IRS FORM 1040 LINE NUMBER: 17

WE WANT TOTAL INCOME FOR THE YEAR, NOT MONTHLY INCOME.

1. \*YES

5. \*NO

X5714 In total, what was your (family's) annual income from

net rent, trusts, or royalties from any other investment or

business in 2003, before deductions for taxes and anything else?

IRS FORM 1040 LINE NUMBER: 17

Code amount

-1. Nothing

-9. Negative and x5729 negative (public data set only)

0. Inap. (no rental, trust, or royalty income: X5713^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, NEGATIVE VALUES HAVE BEEN SET

TO -9 WHEN X5729 IS NEGATIVE

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X5715 Did you (or anyone else) have income from unemployment or

worker's compensation?

IRS FORM 1040 LINE NUMBER: 19

WE WANT TOTAL INCOME FOR THE YEAR, NOT MONTHLY INCOME.

1. \*YES

5. \*NO

X5716 In total, what was your (family's) annual income from

unemployment or worker's compensation in 2003, before

deductions for taxes and anything else?

IRS FORM 1040 LINE NUMBER: 19

Code amount

0. Inap. (no unemployment income: X5715^=1)

X5717 Did you (or anyone else) have income from child support or

alimony which you or your family here received?

IRS FORM 1040 LINE NUMBER: 11

WE WANT TOTAL INCOME FOR THE YEAR, NOT MONTHLY INCOME.

1. \*YES

5. \*NO

X5718 In total, what was your (family's) annual income from

child support or alimony which you or your family here

received in 2003, before deductions for taxes and anything

else?

IRS FORM 1040 LINE NUMBER: 11

Code amount

0. Inap. (no child support or alimony income: X5717^=1)

X5719 Did you (or anyone else) have income from TANF, food

stamps, or other forms of welfare or assistance such as SSI?

WE WANT TOTAL INCOME FOR THE YEAR, NOT MONTHLY INCOME.

1. \*YES

5. \*NO

X5720 In total, what was your (family's) annual income from

TANF, food stamps, or other forms of welfare or

assistance such as SSI in 2003, before deductions for

taxes and anything else?

Code amount

0. Inap. (no welfare income: X5719^=1)

GF

X5721 Did you (or anyone else) have income from Social Security

or other pensions, annuities, or other disability or

retirement programs?

IRS FORM 1040 LINE NUMBER: 16a,20a

WE WANT TOTAL INCOME FOR THE YEAR, NOT MONTHLY INCOME.

DO NOT INCLUDE SSI -- THIS SHOULD BE INCLUDED IN THE

NEXT QUESTION ON WELFARE AND ASSISTANCE.

1. \*YES

5. \*NO

X5722 (Including the retirement income you told me about, in/In)

total, what was your (family's) net income from

Social Security or other pensions, annuities, or other

disability or retirement programs in 2003, before

deductions for taxes and anything else?

(Please do not include withdrawals from IRAS, 401(k)s and

other such retirement accounts.)

IRS FORM 1040 LINE NUMBER: 16a,20a

Code amount

0. Inap. (no Social Security, pension, or annuity income:

X5721^=1)

X5723 Did you (or anyone else) have income from any other sources?

IRS FORM 1040 LINE NUMBER: 15a,21

WE WANT TOTAL INCOME FOR THE YEAR, NOT MONTHLY INCOME.

1. \*YES

5. \*NO

X5725 What other sources?

1. Settlements; from lawsuits, divorce, insurance

2. Gambling winnings; prize money

3. Education scholarships or grants (not including

loans); G.I. Bill; "fellowships"

4. Honorarium

7. Agricultural support payments; rural housing subsidy

11. "IRA", n.f.s.; IRA/401(k) withdrawal; withdrawal from

deferred compensation account and not reported

elsewhere as an IRA or pension withdrawal

12. Inheritance/gifts

13. Other help/support from relatives

14. Repayment of debts

15. Income tax refund

21. Care of foster child in the home

22. Housing subsidy/rent paid by a government agency or

employer

23. Trustee fee; executor fee

24. Director's fee

25. Misc. other fees (e.g., fee for guaranteeing a loan,

jury duty)

28. Gift or support, n.e.c.

29. Amount of loan forgiven

30. Sale of asset (coding as capital gain/loss has priority at

X5711/12); combined interest and principal on notes/loans

(other than X5707/08)

31. Alaska Permanent Fund

32. Payment from former employer (other than X5721/22)

35. Foreign earned income; Form 2555 income

36. Net operating loss carryforward

40. Referral fee

0. Inap. (no other income: X5723^=1)

NOTE: In contrast to earlier years of the SCF, the 2004

SCF does not include withdrawals from IRA's and other

tax deferred pension accounts in "other" income. To

create a measure comparable to that in the earlier

surveys, users should add in the amount of withdrawals

from IRAs and tax-deferred pension accounts to X5724:

X5724=X5724+X6558+X6566+X6574+MAX(0,X6464)+MAX(0,X6469)+

MAX(0,X6474)+MAX(0,X6479)+MAX(0,X6484)+MAX(0,X6489)+

MAX(0,X6965)+MAX(0,X6971)+MAX(0,X6977)+MAX(0,X6983)+

MAX(0,X6989)+MAX(0,X6995).

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODE 2 IS COMBINED WITH

CODE 1; CODE 23 IS COMBINED WITH CODE 24; CODE 21

IS COMBINED WITH CODE 22; CODE 29 IS COMBINED WITH

CODE 28; CODE 30 IS COMBINED WITH CODE 32; CODE 35

IS COMBINED WITH CODE 36; CODE 40 IS COMBINED WITH

CODE 25; CODES 3, 4, AND 31 ARE COMBINED WITH CODE

-7

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

GF

X5724 (Other than withdrawals from account-type pensions or IRAs

you told me about earlier in the interview, in/In) total,

what was your (family's) annual income from any other

sources in 2003, before deductions for taxes and anything

else?

IRS FORM 1040 LINE NUMBER: 15a,21

Code amount

-1. Nothing

-9. Negative and x5729 negative (public data set only)

0. Inap. (no other income: X5723^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, NEGATIVE VALUES HAVE BEEN SET

TO -9 WHEN X5729 IS NEGATIVE

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7361 I would like to confirm that your total 2003 income from all

I would like to confirm that your family's total 2003

income from all

sources was {X5702+X5704+X5706+X5708+X5710+X5712+X5714+

X5716+X5718+X5720+X5722+X5724}.

Is that correct?

1. \*YES

5. \*NO

0. Inap. (at least one value in {J5702,J5704,J5706,

J5708,J5710,J5712,J5714,J5716,J5718,J5720,J5722,J5724}

>=90)

X5729 What would be the correct total?

How much was the total income you received in 2003 from all

sources, before taxes and other deductions were made?

How much was the total income you and your family living here

received in 2003 from all sources, before taxes and other

deductions were made?

Code amount

-1. Nothing

-9. Negative (public data set only)

NOTE: if X7361=1, the computed total is held in X5729.

NOTE: in the public version of the data set, the X7361 may

be YES, but the value of the income in X5729 may not be

equal to X5702+X5704+X5706+X5708+X5710+X5712+X5714+X5716+

X5718+X5720+X5722+X5724 because of various operations

applied to the data for disclosure avoidance. The details

of this operation cannot be revealed, but a general

description of the process is available in the papers cited

in the introduction to this codebook.

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, NEGATIVE VALUES HAVE BEEN

SET TO -9

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7650 Is this income unusually high or low compared to what you

would expect in a "normal" year, or is it normal?

1. \*High

2. \*Low

3. \*Normal

NOTE: some respondents reported that their 2003 income was

unusually high (low), but gave a normal income figure at

X7362 that was higher (lower). These cases appear to be

ones where the frame of reference for "normal" has shifted:

e.g., a student made an unusually large amount last year as

a student, but in a full-time job now makes more.

Why is that?

X6765 Code reason income unusually high

1. Capital gains

2. Sale of assets

3. Higher business/self-employment income

4. Higher return on investments

5. Worked more; worked overtime; took second job; started

working

9. Pension settlement

10. Other settlement

11. Bonus; other unusual compensation from an employer

12. Inheritance, executor fee

13. Good weather, good crop

14. Took more money out of business

15. Good economy, n.e.c.

16. Unexpected income, n.e.c.

17. Change in household composition

18. Salary increase/higher salary; promotion

19. Social security/retirement/support payments began or

increased

21. Loans payed off

22. Changed jobs

23. Qualified for unemployment

24. Less able to work now; ill since then;

30. Scholarship

31. Support/gifts

-7. Other

0. Inap. (income not unusually high: X7650^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODE 12 IS COMBINED WITH

CODE 10

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6766 Code reason income unusually low

1. Low business/self-employment income

2. Low returns on investments

3. Worked less; no overtime; laid off; fired; other not

working in past

4. Illness; disability

5. In school

6. Stopped working: child

7. Stopped working: retired

8. Stopped working: other

9. Current pension or other type of income not started yet

10. Depreciation

11. Business/job startup; business expansion

12. Bad weather, bad crop, other natural occurence

13. Took less money out of business; compensation deferred

14. Bad economy, n.e.c.

15. Change in household composition

16. Charitable donation made

17. Decrease in benefits

18. Legal expenses/law suit

19. Not enough tax write-offs/tax problems

20. Bankruptcy

21. Lower salary/wages

22. Capital loss

23. Moved

24. Social security/retirement/support payments stopped or

decreased

25. Divorce: spouse died

26. Inflation

27. Took pay cut

-7. Other

0. Inap. (income not unusually low: X7650^=2)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODE 20 IS COMBINED WITH 14;

CODE 21 IS COMBINED WITH CODE 19

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7362 About what would your total income have been if it had been

a normal year?

Code amount

-9. Negative

0. inap. (income normal: X7650=3)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, NEGATIVE VALUES HAVE BEEN SET

TO -9

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X304 Over the past five years, did your total income go up more

than prices, less than prices, or about the same as prices?

Over the past five years, did your total family income go up

more than prices, less than prices, or about the same as prices?

1. \*Up more

2. \*Up less

3. \*About the same

X7364 Over the next year, do you expect your total income to go up

more than prices, less than prices, or about the same as prices?

Over the next year, do you expect your total family income

to go up more than prices, less than prices, or about the same

as prices?

1. \*Up more

2. \*Up less

3. \*About the same

X7586 At this time, do you have a good idea of what your income

for next year will be?

At this time, do you have a good idea of what your family's

income for next year will be?

1. \*YES

5. \*NO

X7366 Do you usually have a good idea of what your next year's

income will be?

Do you usually have a good idea of what your family's next

year's income will be?

1. \*YES

5. \*NO

X5731 During 2003, did you pay any alimony, separation payments,

or child support?

During 2003, did you or anyone in your family living here

pay any alimony, separation payments, or child support?

1. \*YES

5. \*NO

X5732 Altogether, how much alimony and/or child support did you

pay in 2003?

Altogether, how much alimony and/or child support did you

and your family pay in 2003?

Code amount

0. Inap. (no alimony: X5731^=1)

X5733 During 2003, did you (or anyone in your family living here)

provide any (other) financial support for relatives or

friends who do not live here?

Please do not include alimony or child support.

INCLUDE SUBSTANTIAL GIFTS.

1. \*YES

5. \*NO

X5734 How much support did you pay?

How much support did you and your family pay?

Code amount

0. Inap. (no support given: X5733^=1)

To whom was this support given?

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN

X5735 \*Children under 18

X5736 \*Children 18 and over

X5737 \*Parents (In-Law)

X5738 \*Grandchildren

X5739 \*Grandparents

X5740 \*Siblings (In-Law)

X5741 \*Niece/Nephew

X5742 \*Friend

X5743 \*Other

1. Checked (only for X5735-X5742)

5. Not checked

9. Ex-spouse (will be edited out if same as payments to

separated spouse reported at X5925 or spouse version)

(X5743 only)

10. Other relatives; "family", n.f.s. (X5743 only)

11. Aunt/Uncle (X5743 only)

25. Former employee (X5743 only)

0. Inap. (no support given: X5733^=1)

X5744 Did you or your (husband/wife/partner) file, or do you

expect to file, a Federal Income tax return for 2003?

Did you file, or do you expect to file, a Federal Income

tax return for 2003?

RETURNS FOR 2003 WOULD NORMALLY HAVE BEEN FILED IN 2004.

1. \*YES - FILED

5. \*NO - DO NOT EXPECT TO FILE

6. \*YES - NOT YET FILED

X5746 Did you and your (husband/wife/partner) file a joint

return, did you file separately, or did only one of you

file?

Will you and your (husband/wife/partner) file a joint

return, will you file separately, or will only one of you

file?

1. \*Filed jointly

2. \*Filed separately

3. \*Only R Filed

4. \*Only Spouse/Partner Filed

0. Inap. (did not file and does not expect to do so:

X5744=5; no spouse)

-----------------------------------------------------------------------------

#1 refers to joint return

#2 refers to separate return for head

#3 refers to separate return for spouse/partner

-----------------------------------------------------------------------------

Did you and your (husband/wife/partner) file a schedule C,

E, or F with your return?

Will you and your (husband/wife/partner) file a schedule C,

E, or F with your return?

Did you file a schedule C, E, or F with your return?

Will you file a schedule C, E, or F with your return?

Did your (spouse/partner) file a schedule C, E, or F with

(his/her) return?

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN

SCHEDULE C IS FOR SELF EMPLOYMENT INCOME.

SCHEDULE E IS FOR REAL ESTATE, PARTNERSHIP, S CORP., ROYALTY, AND

TRUST INCOME.

SCHEDULE F IS FOR FARM INCOME.

X5747(#1) \*Schedule C

X7758(#2)

X7762(#3)

X5748(#1) \*Schedule E

X7759(#2)

X7763(#3)

X5749(#1) \*Schedule F

X7760(#2)

X7764(#3)

X5750(#1) None of these; originally \*No

X7761(#2)

X7765(#3)

1. Checked

5. Not checked

0. Inap. (did not file and does not expect to do so:

X5744=5; filed separately: X5746=2; only R filed:

X5746=3; only spouse filed: X5746=4

/did not file and does not expect to do so: X5744=5;

filed jointly: X5746=1; only spouse filed: X5746=4;

/did not file and does not expect to do so: X5744=5;

filed jointly: X5746=1; only R filed: X5746=3;

no spouse)

X7367(#1) Did you itemize deductions?

X7368(#2)

X7369(#3) Will you itemize deductions?

Did (he/she) itemize deductions on the return?

Will (he/she) itemize deductions on the return?

1. \*YES

5. \*NO

0. Inap. (did not file and does not expect to do so:

X5744=5; filed separately: X5746=2; only R filed:

X5746=3; only spouse filed: X5746=4

/did not file and does not expect to do so: X5744=5;

filed jointly: X5746=1; only spouse filed: X5746=4;

/did not file and does not expect to do so: X5744=5;

filed jointly: X5746=1; only R filed: X5746=3;

no spouse)

GF

X5751(#1) What was you and your (husband/wife/partner)'s total adjusted

X7651(#2) gross income (AGI) on your 2003 tax return?

X7652(#3) IRS FORM 1040, LINE 34.

What will be you and your (husband/wife/partner)'s total

adjusted gross income (AGI) on your 2003 tax return? (What

do you think it will be?)

IRS FORM 1040, LINE 34.

What was your total adjusted gross income (AGI) on your

2003 tax return?

IRS FORM 1040, LINE 34.

What will be your total adjusted gross income (AGI) on your

2003 tax return? (What do you think it will be?)

IRS FORM 1040, LINE 34.

What was (his/her) total adjusted gross income (AGI) on

(his/her) 2003 tax return?

IRS FORM 1040, LINE 34.

What will be (his/her) total adjusted gross income (AGI) on

(his/her) 2003 tax return? (What do you think it will be?)

IRS FORM 1040, LINE 34.

AGI IS TOTAL INCOME BEFORE ITEMIZED AND PERSONAL DEDUCTIONS

ARE REMOVED

Code amount

-1. Nothing

-9. Negative

0. Inap. (did not file and does not expect to do so:

X5744=5; filed separately: X5746=2; only R filed:

X5746=3; only spouse filed: X5746=4

/did not file and does not expect to do so: X5744=5;

filed jointly: X5746=1; only spouse filed: X5746=4;

/did not file and does not expect to do so: X5744=5;

filed jointly: X5746=1; only R filed: X5746=3;

no spouse)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, NEGATIVE VALUES HAVE BEEN SET

TO -9

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

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INHERITANCES AND CHARITABLE CONTRIBUTIONS

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

X5801 Including any gifts or inheritances you may have already

told me about, have you (or your [husband/wife/partner])

ever received an inheritance, or been given substantial

assets in a trust or in some other form?

IF YES: Please do not include inheritances from a deceased

spouse.

1. \*YES

5. \*NO

X5802 How many of these have you or your (husband/wife/partner) ever

received?

How many of these have you ever received?

Code number

0. Inap. (no inheritances: X5801^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 5

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6703 Originally reported value of X5802 (see introduction)

Code number

0. Inap. (no inheritances: X5801^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 5

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

-----------------------------------------------------------------------------

#1 refers to the first gift/inheritance

#2 refers to the second gift/inheritance

#3 refers to the third gift/inheritance

#4 refers to all remaining gifts/inheritances

-----------------------------------------------------------------------------

X5803(#1) Was that an inheritance, a trust, or what?

X5808(#2)

X5813(#3) Thinking about the largest of these, was that an inheritance,

a trust, or what?

1. \*INHERITANCE; insurance

2. \*TRUST

3. \*TRANSFER/GIFT

6. \*INHERITED TRUST

-7. \*OTHER

0. Inap. (no inheritances: X5801^=1; no inheritances:

X5802<1/less than 2 inheritances: X5802<2/less than 3

inheritances: X5802<3)

NOTE: the large number of -7 codes for this variable reflect

a programming error that cause the verbatim response to the

question to be skipped.

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODE 6 IS COMBINED WITH

CODE 1

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X5804(#1) What was its approximate value at the time it was received?

X5809(#2)

X5814(#3) IF R RECEIVED A TRUST OVER SOME PERIOD, INCLUDE ALL THE

MONEY PUT INTO THE TRUST.

Code amount

0. Inap. (no inheritances: X5801^=1; no inheritances:

X5802<1/less than 2 inheritances: X5802<2/less than 3

inheritances: X5802<3)

X5805(#1) In what year was it received?

X5810(#2)

X5815(#3) IF R RECEIVED A TRUST OVER SOME PERIOD, RECORD THE EARLIEST

DATE.

Code year (4 digits)

0. Inap. (no inheritances: X5801^=1; no inheritances:

X5802<1/less than 2 inheritances: X5802<2/less than 3

inheritances: X5802<3)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, BOTTOM-CODED AT

X8095-60 AND THEN ROUNDED TO NEAREST 5.

IF ROUNDED VALUE > 2004, THEN VALUE IS TRUNCATED

AT 2004.

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X5806(#1) From whom was it received?

X5811(#2)

X5816(#3) Code person

1. \*Grandparent

2. \*Parent

3. \*Child

4. \*Aunt/Uncle

5. \*Sibling

6. \*Friend

12. Government settlement; compensation

25. Family, n.e.c.

30. Divorced former spouse

-7. \*Other

0. Inap. (no inheritances: X5801^=1; no inheritances:

X5802<1/less than 2 inheritances: X5802<2/less than 3

inheritances: X5802<3)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODE 30 HAS BEEN COMBINED

WITH CODE 25

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X5818(#4) How much altogether were any others you have received?

Code amount

0. Inap. (no inheritances: X5801^=1; less than 4

inheritances: X5802<4)

X8451(#4) Original value of remaining total for Rs who did not

provide complete information within the grid structure (see

introduction)

Code amount

0. Inap. (no inheritances: X5801^=1; did not break off

early in grid)

X5819 Do you or your (husband/wife/partner) expect to receive a

substantial inheritance or transfer of assets in the future?

Do you expect to receive a substantial inheritance or transfer

of assets in the future?

1. \*YES

5. \*NO

X5821 About how much do you expect?

Code amount

0. Inap. (no expected future inheritance: X5819^=1)

X5822 During 2003, did you make charitable contributions of money

or property totaling $500 or more?

During 2003, did you or anyone in your family living here

make charitable contributions of money or property totaling

$500 or more?

Please do not include political contributions.

DO NOT INCLUDE CONTRIBUTIONS OF TIME.

1. \*YES

5. \*NO

X5823 Roughly, how much did you contribute?

Roughly, how much did your family contribute?

Code amount

0. Inap. (no charitable contributions: X5822^=1)

GF

X7098 Do you have any sort of charitable trust or foundation?

Do you or your family living there have any sort of

charitable trust or foundation?

EXCLUDE CHARITABLE REMAINDER TRUSTS

1. \*YES

5. \*NO

GF

X7099 What is the current value of the trust or foundation?

Code amount

0. Inap. (no charitable trust or foundation: X7098^=1)

X7662 During 2003, did you volunteer an average of one hour or

more a week to any charitable organizations?

During 2003, did you or anyone in your family living here

volunteer an average of one hour or more a week to any

charitable organizations?

IF YES: Please do not include time volunteered for

political causes.

1. \*YES

5. \*NO

X5824 Some people think it is important to leave an estate or

inheritance to their surviving heirs, while others don't.

Which is closer to your

you and your (husband/wife/partner)'s feelings? Would you

say it is very important, important, somewhat important, or

not important?

feelings? Would you say it is very important, important,

somewhat important, or not important?

1. \*Very Important

2. \*Important

3. \*R and SP/PARTNER DIFFER

4. \*Somewhat Important

5. \*Not Important

X5825 Do you and your (spouse/partner) expect to leave a sizable

estate to others?

Do you expect to leave a sizable estate to others?

1. \*Yes

3. \*POSSIBLY

5. \*no

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

DEMOGRAPHIC CHARACTERISTICS

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

-----------------------------------------------------------------------------

#1 refers to characteristics of head

#2 refers to characteristics of spouse/partner

-----------------------------------------------------------------------------

For the last part of the interview I will be asking some

questions about (your/you and your wife's) education, family

background and health insurance coverage.

For the last part of the interview I will be asking some

questions about (your/you and your wife's) education,

family background and health insurance coverage and a few

questions about the other people in your household.

X5901(#1) What is the highest grade of school or year of college you

X6101(#2) completed?

I'd like to ask you some questions about your

(husband/wife/partner)'s background.

What is the highest grade of school or year of college

(he/she) completed?

RECORD THE HIGHEST LEVEL OF EDUCATION COMPLETED, NOT THE

TIME IT TOOK TO COMPLETE IT. DO NOT INCLUDE TRADE SCHOOLS

AS COLLEGE.

-1. No grades completed

1. \*1ST GRADE

2. \*2ND GRADE

3. \*3RD GRADE

4. \*4TH GRADE

5. \*5TH GRADE

6. \*6TH GRADE

7. \*7TH GRADE

8. \*8TH GRADE

9. \*9TH GRADE

10. \*10TH GRADE

11. \*11TH GRADE

12. \*12TH GRADE

13. \*1 YEAR OF COLLEGE

14. \*2 YEARS OF COLLEGE

15. \*3 YEARS OF COLLEGE

16. \*4 YEARS OF COLLEGE

17. \*GRADUATE SCHOOL

0. Inap. (/no spouse)

GF

X5902(#1) Did you get a high school diploma or pass a high school

X6102(#2) equivalency test? Was that a diploma, GED or other

equivalency program?

Did (he/she) get a high school diploma or pass a high

school equivalency test? Was that a diploma, GED or

other equivalency program?

1. \*YES, DIPLOMA

2. \*YES, GED or other EQUIVALENCY PROGRAM

5. NO, \*NEITHER

0. Inap. (/no spouse; more than 12 years of education:

X5901>12/X6101>12)

X5903(#1) Since completing your formal education, have you had

X6103(#2) on-the-job training or other vocational training lasting

100 hours or more?

Since completing (his/her) formal education, has (he/she)

had on-the-job training or other vocational training

lasting 100 hours or more?

1. \*YES

5. \*NO

0. Inap. (/no spouse; more than 12 years of education:

X5901>12/X6101>12)

X5904(#1) Did you get a college degree?

X6104(#2) Did (he/she) get a college degree?

DO NOT INCLUDE CERTIFICATES FROM TRADE SCHOOLS AS A COLLEGE

DEGREE.

1. \*YES

5. \*NO

0. Inap. (/no spouse; 12 years or less of education:

X5901<=12/X6101<=12)

X5905(#1) What is the highest degree you have earned?

X6105(#2) What is the highest degree (he/she) earned?

INTERVIEWER: WE WANT THE DEGREE, NOT A LICENSE

Code degree

1. \*Associate's; and other junior college degree

2. \*Bachelor's

3. \*MA/MS; and other master's except MBA

9. \*MBA

4. \*Ph.D; including post-doctorate

5. \*MD; DDS/DMD; Doctor of Osteopathy

6. \*Law; JD

10. Nursing degree (RN, LPN)

11. Other certificate, Chiropractic, Naprapathy,

Homeopathy, Pharmacology, teaching certificate

12. Other doctorate (DVM, Doctor of Divinity, etc.)

-7. \*Other

0. Inap. (/no spouse; 12 years or less of education:

X5901<=12/X6101<=12; did not get a degree: X5904^=1/

X6104^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODE 9 IS COMBINED WITH

CODE 3; CODES 5, 6, AND 12 ARE COMBINED WITH CODE 4;

CODE 10 IS COMBINED WITH CODE 11

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X5906(#1) Have you ever been in the military service?

X6106(#2)

Has (he/she) ever been in the military service?

INCLUDE ONLY SERVICE IN U.S. MILITARY OR NATIONAL GUARD.

1. \*YES

5. \*NO

0. Inap. (/no spouse)

X7004 Do you consider yourself to be Hispanic or Latino in

culture or origin?

1. \*YES

5. \*NO

X6809 X6810 X6811 X6812 X6813 X6814

IN PERSON VERSION:

(SHOW CARD 12)

Please look at this card. Which of these categories do you

feel best describe you: (white, black or African-American,

Hispanic or Latino, Asian, American Indian or Alaska Native,

Hawaiian Native or other Pacific Islander, or another

race?)

TELEPHONE VERSION:

Which of these categories do you feel best describe you:

white, black or African-American, Hispanic or Latino,

Asian, American Indian or Alaska Native, Hawaiian Native

or other Pacific Islander, or another race?

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN

1. \*WHITE; (INCLUDE MIDDLE EASTERN/ARAB WITH WHITE); Caucasian

2. \*BLACK/AFRICAN-AMERICAN

3. \*HISPANIC/LATINO

4. \*ASIAN

5. \*AMERICAN INDIAN/ALASKA NATIVE

6. \*NATIVE HAWAIIAN/PACIFIC ISLANDER

-7. \*OTHER

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET:

ONLY X6809 AND X6810 ARE INCLUDED.

FOR X6809, CODES 4, 5, AND 6 ARE

COMBINED WITH CODE -7.

IF AN ADDITIONAL RESPONSE WAS GIVEN IN X6810-X6814,

X6810 IS SET TO 1; OTHERWISE X6810 IS SET TO 5.

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOTE: This question was asked only of the designated

respondent (if X8000=5, this person is the head, otherwise

it is the spouse/partner)

NOTE: CARD 12 contains the following text printed in a

vertical column: "Native American; Eskimo; Aleut," Asian;

Pacific Islander," "Hispanic," "Black; African American,"

"White," "Other."

X5910 Now I'd like to ask some questions about your family living

elsewhere. Altogether, including children from previous

marriages and adopted

children, how many sons and daughters do you or your

(husband/wife/partner) have who do not live with you?

children, how many sons and daughters do you have who do

not live with you?

INCLUDE ONLY LIVING CHILDREN/STEP-CHILDREN

Code number

-1. None

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 10

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X5911 How many of them are 25 or older?

Is that child 25 or older?

Code number

-2. \*ALL OF THEM

-1. \*NONE

0. Inap. (no children who do not live with R: X5910=-1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 5

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X5912 How many of them are less than 18 years old?

Is that child less than 18 years old?

Code number

-2. \*ALL OF THEM

-1. \*NONE

0. Inap. (no children who do not live with R: X5910=-1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 5

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X5913(#1) How many living brothers and sisters do you have?

X6109(#2)

How many living brothers and sisters does (he/she) have?

DO NOT INCLUDE STEP- OR HALF-SISTERS/BROTHERS

DO NOT INCLUDE SISTERS-IN-LAW/BROTHERS-IN-LAW

Code number

-1. None

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 6

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X5914(#1) How many of them are older than (you/him/her)?

X6110(#2)

Is he or she older than (you/him/her)?

Code number

-2. \*ALL OF THEM

-1. \*NONE OF THEM

0. Inap. (no siblings: X5913=-1/X6109=-1;/no spouse or

partner:X102^=2 or 3)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 6

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

How many years have you been married to your current spouse?

How many years have you been living with your partner?

X7370(#1) Code number of years

-1. Less than a year

0. Inap. (neither married nor living with a partner: X8023^=1

or 2 and X7002^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7371(#1) Code age

0. Inap. (neither married nor living with a partner: X8023^=1

or 2 and X7002^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X8005(#1) Code year (4 digits)

0. Inap. (neither married nor living with a partner: X8023^=1

or 2 and X7002^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, ROUNDED TO

NEAREST 2 AND THEN BOTTOM-CODED AT

X8095-60 AND TOP-CODED AT 2005

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7372(#1) What is your current legal marital status? Are you

X7018(#2) married, separated, divorced, widowed, or have you never

been married?

1. \*MARRIED

3. \*SEPARATED

4. \*DIVORCED

5. \*WIDOWED

6. \*NEVER MARRIED

0. Inap. (/no spouse or partner: X102^=2 or 3)

X6767(#1) Recode: number of years in previous marriage.

X6768(#2)

Code number of years

-1. Less than a year

0. Inap. (not separated, widowed, or divorced: X8023^=3,

4, or 5 and X7372^=3, 4, or 5; R married and living

with a parter: X8023=2 and X7372=1/Sp Married and

living with a partner: X8023=2 & X7018=1; no

spouse or partner)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, TOP-CODED AT 60

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

In what year were you separated from your spouse?

In what year were you divorced?

In what year were you widowed?

In what year did your spouse start living somewhere else?

In what year were you separated, divorced, or widowed?

X8007(#1) Code year (4 digits)

0. Inap. (not separated, widowed, or divorced: X8023^=3,

4, or 5 and X7372^=3, 4, or 5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, ROUNDED TO

NEAREST 2 AND THEN BOTTOM-CODED AT

X8095-60 AND TOP-CODED AT 2005

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7373(#1) Code age

0. Inap. (not separated, widowed, or divorced: X8023^=3,

4, or 5 and X7372^=3, 4, or 5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7374(#1) Code number of years ago

-1. Less than a year

0. Inap. (not separated, widowed, or divorced: X8023^=3,

4, or 5 and X7372^=3, 4, or 5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

In what year did your current marriage begin?

In what year did that marriage begin?

X8008(#1) Code year

0. Inap. (not separated, widowed, or divorced and not

married but living with a partner: X8023^=3, 4, or 5

and X7372^=3, 4, or 5 and [X8023^=1 or X7002^=1] and

[X8023^=2 or X7372^=1])

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7375(#1) Code age

0. Inap. (not separated, widowed, or divorced and not

married but living with a partner: X8023^=3, 4, or 5

and X7372^=3, 4, or 5 and [X8023^=1 or X7002^=1] and

[X8023^=2 or X7372^=1])

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7376(#1) Code number of years

-1. Less than a year

0. Inap. (not separated, widowed, or divorced and not

married but living with a partner: X8023^=3, 4, or 5

and X7372^=3, 4, or 5 and [X8023^=1 or X7002^=1] and

[X8023^=2 or X7372^=1])

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

In what year was your (husband/wife/partner)

(separated/divorced/widowed)?

X8016(#2) Code year (4 digits)

0. Inap. (partner not separated, widowed, or divorced:

X7018^=3, 4, or 5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X7383(#2) Code age

0. Inap. (partner not separated, widowed, or divorced:

X7018^=3, 4, or 5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7384(#2) Code number of years ago

-1. Less than a year

0. Inap. (partner not separated, widowed, or divorced:

X7018^=3, 4, or 5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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In what year did your partner's current marriage begin?

In what year did that marriage begin?

X8017(#2) Code year (4 digits)

0. Inap. (partner not currently married, separated,

divorced, or widowed: X7018^=1, 3, 4, or 5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7385(#2) Code age

0. Inap. (partner not currently married, separated,

divorced, or widowed: X7018^=1, 3, 4, or 5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7386(#2) Code number of years ago

-1. Less than a year

0. Inap. (partner not currently married, separated,

divorced, or widowed: X7018^=1, 3, 4, or 5)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X5925(#1) Do you receive support from your (husband/wife), do you pay

X7387(#2) support, or is there no support involved?

Do you receive support from your wife, do you pay support,

or is there no support involved?

Do you receive support from your husband, do you pay

support, or is there no support involved?

Does your partner receive support from his wife, does he

pay support, or is there no support involved?

Does your partner receive support from her husband, does she

pay support, or is there no support involved?

1. \*Receive Support

2. \*No Support Involved

3. \*Pay Support

0. Inap. (not married and living with partner, and not

separated: X8023^=1 and X7372^=1 and X8023^=3 and

X7372^=3/no partner or partner not married or

separated: [X8023^=2 and X7002^=1] or [(X8023=2 or

X7002=2) and X7018=1 or 3])

X5926(#1) How much do you receive?

X6650(#2)

How much does (he/she) receive?

Code amount

0. Inap. (not married and living with partner, and not

separated: X8023^=1 and X7372^=1 and X8023^=3 and

X7372^=3/no partner or partner not married or

separated: [X8023^=2 and X7002^=1] or [(X8023=2 or

X7002=2) and X7018=1 or 3]; does not receive support:

X5925^=1/X7387^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X5927(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X6651(#2) (Is that weekly, monthly, quarterly, yearly, or what?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year

12. Every two months

31. \*Twice a month

-7. \*Other

0. Inap. (not married and living with partner, and not

separated: X8023^=1 and X7372^=1 and X8023^=3 and

X7372^=3/no partner or partner not married or

separated: [X8023^=2 and X7002^=1] or [(X8023=2 or

X7002=2) and X7018=1 or 3]; does not receive support:

X5925^=1/X7387^=1)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X5928(#1) How much do you pay?

X6652(#2)

How much does (he/she) pay?

Code amount

0. Inap. (not married and living with partner, and not

separated: X8023^=1 and X7372^=1 and X8023^=3 and

X7372^=3/no partner or partner not married or

separated: [X8023^=2 and X7002^=1] or [(X8023=2 or

X7002=2) and X7018=1 or 3]; does not pay support:

X5925^=3/X7387^=3)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X5929(#1) INTERVIEWER: CODE WITHOUT ASKING IF ALREADY MENTIONED.

X6653(#2) (Is that weekly, monthly, quarterly, yearly, or what?)

Code frequency

2. \*Week

3. Every two weeks

4. \*Month

5. \*Quarter

6. \*Year

8. \*Lump sum; one payment only

11. \*Twice per year

12. Every two months

31. \*Twice a month

-7. \*Other

0. Inap. (not married and living with partner, and not

separated: X8023^=1 and X7372^=1 and X8023^=3 and

X7372^=3/no partner or partner not married or

separated: [X8023^=2 and X7002^=1] or [(X8023=2 or

X7002=2) and X7018=1 or 3]; does not pay support:

X5925^=3/X7387^=3)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X5930(#1) Are the assets and debts that you've told me about in this

interview owned mainly by you and your partner, are they

owned jointly with your (husband/wife), or what?

Are the assets and debts that you've told me about in this

interview owned mainly by you, are they owned jointly with

your (husband/wife), or what?

1. \*OWNED BY R/OWNED BY R AND PARTNER [living there]

THAT IS: all items owned by R and any others in the

primary economic unit, including a partner where one

is present

2. \*OWNED JOINTLY BY R AND SPOUSE

3. Mainly owned by spouse

-1. No assets

-7. \*Other

0. Inap. (not married and living with partner, and not

separated: X8023^=1 and X7372^=1 and X8023^=3 and

X7372^=3)

X7377(#1) Was this your first marriage, or had you been married before?

X7392(#2)

Is your marriage to your absent spouse your first marriage,

or have you been married before?

Is this your first marriage, or have you been married before?

Is this your (husband/spouse/partner)'s first marriage, or has

(he/she) been married before?

Was this your partner's first marriage, or has (he/she)

been married before?

1. \*First Marriage

2. \*Married Before

0. Inap. (never married: X8023=6 or X7372=6/no spouse or

partner or partner not married before: [X8023^=1 or 2

and X7002^=1] or X7018^-3, 4, or 5)

How old were you when you were married the first time?

How old was (he/she) when (he/she) was married the first time?

X7378(#1) Code year (4 digits)

X7393(#2) 0. Inap. (never married: X8023=6 or X7372=6/partner not

married before: X105=6; not married before: X7377^=2/

spouse not married before: X7392^=2)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X8011(#1) Code age

X8018(#2) 0. Inap. (never married: X8023=6 or X7372=6/partner

never married: X105=6)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X7379(#1) Code number of years ago

X7394(#2) -1. Less than a year

0. Inap. (never married: X8023=6 or X7372=6/partner

never married: X105=6)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6026(#1) Now I'd like to ask about your parents.

X6120(#2)

Is your mother still living?

Is your (husband/wife/partner)'s mother still living?

1. \*YES

5. \*NO

0. Inap. (/no spouse)

X6027(#1) What is her age?

X6121(#2)

Code age

0. Inap. (/no spouse; mother not living: X6026^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, ROUNDED TO NEAREST 5

AND TOP-CODED AT 95

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6028(#1) Is your father still living?

X6122(#2)

Is your (husband/wife/partner)'s father still living?

1. \*YES

5. \*NO

0. Inap. (/no spouse)

X6029(#1) What is his age?

X6123(#2)

Code age

0. Inap. (/no spouse; father not living: X6028^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, ROUNDED TO NEAREST 5

AND TOP-CODED AT 95

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X7380(#1) Now I'd like to ask you some questions about your health;

X7395(#2) do you currently smoke?

Now I'd like to ask you some questions about your

(husband/wife/partner)'s health; does your

(husband/wife/partner) currently smoke?

1. \*YES

5. \*NO

0. Inap. (/no spouse)

X6030(#1) Would you say your health is excellent, good, fair, or poor?

X6124(#2)

Would you say your (husband/wife/partner)'s health in

general is excellent, good, fair, or poor?

1. \*Excellent

2. \*Good

3. \*Fair

4. \*Poor

0. Inap. (/no spouse)

X7381(#1) About how old do you think you will live to be?

X7396(#2)

If we asked your (husband/wife/partner), about how old do you

think (he/she) would say that (he/she) expects to live to be?

Code age

0. Inap. (/no spouse)

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HEALTH INSURANCE

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For the rest of the questions in the interview, please

include the people in your household who have independent

finances.

For the rest of the questions in the interview, please

include the people in your household who have independent

finances, not just the ones we have been referring to as

"your family" as we have gone through the interview.

HOUSEHOLD MEMBERS WITH INDEPENDENT FINANCES

RELATIONSHIP SEX AGE MARITAL

GF

X6301 Are you (or anyone in your family living here[, including

household members with independent finances,]) currently

eligible to receive benefits from any government health

insurance program, such as Medicare, Medicaid, CHIP

(Children's Health Insurance Program) or Tri-Care, VA, or

other military programs?

TRI-CARE WAS FORMERLY KNOWN AS CHAMPUS.

DO NOT INCLUDE HEALTH INSURANCE FROM A GOVERNMENT JOB.

DO NOT INCLUDE HEALTH INSURANCE FROM A PRIVATE INSURANCE

COMPANY PAID FOR BY THE GOVERNMENT.

1. \*YES

5. \*NO

Which program is that? (Anything else?)

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN

MAINLY ONLY PERSONS 65 0R OLDER SHOULD BE ELIGIBLE FOR MEDICARE.

ONLY LOW-INCOME PERSONS SHOULD BE ELIGIBLE FOR MEDICAID.

TRI-CARE IS FOR ACTIVE MILITARY.

X6302 \*Medicare

X6303 \*Medicaid

X6593 \*CHIP

X7399 \*Tri-Care

X6304 \*VA

X6305 \*Other

1. Checked (only for X6302, X6303, X6304, X6593, and X7399)

5. Not checked

6. Women, Infants, and Children (WIC), other federal

welfare (X6305 only)

7. Other federal government plans; Indian Health Service

(X6305 only)

8. Other state/local government plans (X6305 only)

9. Foreign government health plan (X6305 only)

-7. Other (X6305 only)

0. Inap. (no government insurance: X6301^=1)

NOTE: This does not include civil service health plans,

which are treated as private plans.

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

FOR THE PUBLIC DATA SET, CODES 7 AND 9 ARE COMBINED

WITH CODE 8 (X6305 ONLY); X7399 IS NOT INCLUDED BUT IS

COMBINED WITH CODE 8 (X6305 ONLY); X6304 IS COMBINED

WITH CODE 8 (X6305 ONLY); X6593 IS COMBINED WITH "YES"

RESPONSES FOR X6303 (MEDICAID)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6306 Is everyone living here covered by this program?

Is everyone living here covered by one of these programs?

1. \*YES

5. \*NO

0. Inap. (no government insurance: X6301^=1)

Who is not covered? (CODE ALL THAT APPLY)

X6308 Head; Orginally \*Respondent

X6309 \*Spouse/partner

X6310 \*Child(ren) under 18

X6311 Child(ren) 18 and Over

X6312 Father (In-Law)

X6313 Mother (In-Law)

X6314 \*Other

1. Checked (only for X6308, X6309, X6310, X6311, X6312,

and X6313)

5. Not checked

8. Other relative living there (X6314 only)

9. Paid help (X6314 only)

10. Other unrelated person living there (X6314 only)

11. Grandchild (X6314 only)

-7. Other (X6314 only)

0. Inap. (no government insurance: X6301^=1; everyone

covered by government plan: X6306=1)

GF

X6315 (Are you/Is anyone here) covered by any (other) type of

health plan such as employer or union plans, Blue

Cross-Blue Shield, a Health Maintenance Organization

(HMO), a Medigap plan, or some other health insurance?

1. \*YES

5. \*NO

Is this coverage obtained through your employer, former

employer, or union, your (husband/spouse/partner)'s

employer, former employer, or union, through direct

payments to an insurance company, AARP, or somewhere else?

Is this coverage obtained through your employer, former

employer, or union, through direct payments to an insurance

company, AARP, or somewhere else?

Is this coverage obtained through your employer or former

employer, a union, through direct payments to an insurance

company, AARP, or what?

X6316 Head's Employer; Originally \*Respondent's Employer

X6317 Head's Former Employer; Originally \*Respondent's Former Employer

X6318 R's \*Union

X6319 \*Spouse/partner's employer

X6320 \*Spouse/partner's Former Employer

X6321 \*Spouse/partner's Union

X6322 \*DIRECTLY FROM INSURANCE CO.; Direct Payment

X7767 \*AARP

GF

X6323 \*OTHER

1. Checked (only for X6316-X6322 and X7767)

5. Not checked

10. School (X6323 only)

11. Another person in HU (X6323 only)

12. Employer (current or former) of another person in HU

(X6323 only)

13. Another person outside of HU (incl. divorced/separated

spouse) (X6323 only)

14. Employer (current or former) of person outside of HU

(X6323 only)

20. Membership organization (except AARP) (X6323 only)

22. Federal/state/local government-sponsored private plan

(except employer) (X6323 only); include tribal plans

30. Deceased spouse's former employer (X6323 only)

35. Charitable institution

0. Inap. (no private insurance: X6315^=1)

NOTE: The point is who gives access. If R pays part and

employer pays part, the answer is Employer since it is the

employer who provides the option.

How is this coverage paid for - by you (your [spouse/partner]),

by an employer, by you and an employer, by a relative, or what?

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE

GIVEN

X6324 \*Respondent/family; primary economic unit

X6325 \*Employer

X6326 \*Relative

X6327 \*FORMER EMPLOYER

X6328 \*Other

1. Checked (only for X6324-X6327)

5. Not checked

6. Employer (current or former) of someone else in HH

other than R/Spouse/partner (X6328 only)

7. Employer (current or former) of person outside HH,

incl. relatives; employer (current or former) of

divorced/separated spouse (X6328 only)

8. Divorced/separated spouse (X6328 only)

9. Government (X6328 only)

10. Union (X6328 only)

11. Other organization (including church, fraternal

organizations, etc.) (X6328 only)

15. Someone in the HH, but not a part of the primary

economic unit (X6328 only)

30. Deceased spouse's former employer (X6328 only)

0. Inap. (no private insurance: X6315^=1)

X6329 Is everyone in your household covered by at least one of

these private health programs?

1. \*YES

5. \*NO

0. Inap. (no private insurance: X6315^=1)

Who is not covered (including those with independent finances)?

(Anyone else?)

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE GIVEN

X6330 Head; Originally \*Respondent

X6331 \*Spouse/partner

X6332 Child(ren) under 18

X6333 Child(ren) 18 and Over

X6334 Father (In-Law)

X6335 Mother (In-Law)

X6336 \*Other

1. Checked (only for X6330, X6331, X6332, X6333, X6334,

and X6335)

5. Not checked

8. Other relative living there (X6336 only)

9. Paid help (X6336 only)

10. Other unrelated person living there (X6336 only)

11. Grandchild (X6336 only)

-7. Other (X6336 only)

0. Inap. (no private insurance: X6315^=1; everyone covered:

X6329=1)

X7397 Is everyone here covered by some type of government or

private health insurance?

1. \*YES

5. \*NO

0. (no government or no private coverage: X6301^=1 or

X6315^=1; everyone covered: X6306=1 or X6329=1)

X6337 IN PERSON VERSION:

(SHOW CARD 13)

This is a list of reasons why some people don't have health

insurance. Which reason best describes why (you are not

covered/not everyone living here is covered)?

READ RESPONSES IF NECESSARY.

TELEPHONE VERSION:

Which of the following reasons best describes why (you

don't have/not everyone living here has) have health insurance:

Code reason

1. \*It's too expensive, can't afford health insurance

2. \*Can't get health insurance because of poor health,

age, or illness

3. \*Don't believe in health insurance

4. \*Not much sickness in the family - we haven't needed

health insurance

5. \*Dissatisfied with previous insurance

6. \*Job layoff or job loss

7. Everyone covered by some health insurance

11. Not covered on job yet, but will be soon; negotiating now

12. Too old for parental coverage

13. Haven't gotten around to it

14. Lost public assistance

15. Not eligible

18. Not offered by employer

20. Able to manage own health without insurance

25. Self insured

95. Those without private insurance are already covered

by Medicare/Medicaid

-7. \*SOME OTHER REASON

0. (everyone covered: X6306=1 or X6329=1 or X7397=1)

NOTE: CARD 13 contains the following text in a vertical

column: "Too expensive, can't afford health insurance," "

Can't get insurance because of poor health, age, or

illness," "Don't believe in health insurance," "Not much

sickness in the family; we haven't needed insurance,"

"Dissatisfied with previous insurance," "Job layoff or job

loss," "Some other reason."

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INCOME, ASSETS AND DEBTS OF HOUSEHOLD MEMBERS OUTSIDE THE PRIMARY

ECONOMIC UNIT

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X6402 I'd like to ask some questions just about the other adults

18 and over who live with you (and your family) but have

independent finances.

I'd like to ask some questions just about the other adult

18 and over who lives with you (and your family) but has

independent finances.

In 2003, did he receive any income from wages or salaries?

In 2003, did she receive any income from wages or salaries?

In 2003, did they receive any income from wages or salaries?

In 2003, did any of these other adults receive income from wages or

salaries?

1. \*YES

5. \*NO

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5)

X6403 Roughly how much total income did he have from wages and

salaries in 2003 before taxes and deductions?

Roughly how much total income did she have from wages and

salaries in 2003 before taxes and deductions?

Roughly how much total income did they have from wages and

salaries in 2003 before taxes and deductions?

Code amount

-1. Nothing in 2003

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5;

no wages: X6402^=1)

X6404 Did you include this amount in the income you told me about

earlier in this interview?

INTERVIEWER: IF R ONLY TOLD ABOUT PART, MAKE NOTE

(Where did you tell me about this income?)

3. \*YES, amount edited out earlier

4. \*YES, but no apparent match in the data: nothing changed

5. \*NO

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5)

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NOT INCLUDED IN THE PUBLIC DATA SET

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X6405 In 2003, did he receive income from any other sources

such as social security, a pension, disability payments,

public assistance, or income from a business or other

assets?

In 2003, did she receive income from any other sources

such as social security, a pension, disability payments,

public assistance, or income from a business or other

assets?

In 2003, did they receive income from any other sources

such as social security, a pension, disability payments,

public assistance, or income from a business or other

assets?

1. \*YES

5. \*NO

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5)

What other sources of income does he have?

What other sources of income does she have?

What other sources of income do they have?

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE

GIVEN

X6406 \*Social Security

X6407 \*Pensions

X6408 \*Disability

X6409 \*Public Assistance

X6410 \*Interest Income

X6411 \*Dividends

X6412 \*Business

X6413 \*Real Estate

X6414 \*Other

1. Checked (only for X6406-X6413)

5. Not checked

10. Unemployment compensation (X6414 only)

11. Private transfers, including alimony and support

(X6414 only)

12. Other government transfers; miscellaneous Alaskan

funds (X6414 only)

13. Capital gains (X6414 only)

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5;

no other income: X6405^=1)

X6415 Roughly how much total income did he have from

Roughly how much total income did she have from

Roughly how much total income did they have from

all these sources in 2003 before taxes and deductions?

all this source in 2003 before taxes and deductions?

Code amount

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5;

no other income: X6405^=1)

X6416 Did you include this amount in the income you told me about

earlier in this interview?

INTERVIEWER: IF R ONLY TOLD ABOUT PART, MAKE NOTE

(Where did you tell me about this income?)

3. \*YES, amount edited out earlier

4. \*YES, but no apparent match in the data: nothing changed

5. \*NO

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5;

no other income: X6405^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X6417 Does he own any cars or other vehicles?

Does she own any cars or other vehicles?

Do they own any cars or other vehicles?

Do any of them own any cars or other vehicles?

1. \*YES

5. \*NO

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5)

X6418 Roughly how much (is this/are these) vehicle(s) worth now?

Code amount

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5;

no vehicles: X6417^=1)

GF

X6419 Did you include (this/these) vehicle(s) in the ones you

told me about earlier in this interview?

INTERVIEWER: IF R ONLY TOLD ABOUT PART, MAKE NOTE

(Which ones?)

PROBE FOR MAKE AND MODEL

3. \*YES, amount edited out earlier

4. \*YES, but no apparent match in the data: nothing changed

5. \*NO

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5;

no vehicles: X6417^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X6420 Does he have any bank accounts, savings accounts, or

savings bonds?

Does she have any bank accounts, savings accounts, or

savings bonds?

Do they have any bank accounts, savings accounts, or

savings bonds?

1. \*YES

5. \*NO

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5)

X6421 Roughly how much in total does he have in bank accounts,

savings accounts, or savings bonds?

Roughly how much in total does she have in bank accounts,

savings accounts, or savings bonds?

Roughly how much in total do they have in bank accounts,

savings accounts, or savings bonds?

Code amount

-1. Nothing

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5;

no bank accounts: X6420^=1)

X6422 Did you include this amount when you told me about these

items earlier in this interview?

INTERVIEWER: IF R ONLY TOLD ABOUT PART, MAKE NOTE

(Where did you tell me about this/these items?)

3. \*YES, amount edited out earlier

4. \*YES, but no apparent match in the data: nothing changed

5. \*NO

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5;

no bank accounts: X6420^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

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X6423 Does he have any other assets such as stocks, bonds, a

business, or any properties, including any part of the

[house/apartment] you live in?

Does she have any other assets such as stocks, bonds, a

business, or any properties, including any part of the

[house/apartment] you live in?

Do they have any other assets such as stocks, bonds, a

business, or any properties, including any part of the

[house/apartment] you live in?

1. \*YES

5. \*NO

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5)

What other kinds of assets does he have?

What other kinds of assets does she have?

What other kinds of assets do they have?

CODE ALL THAT APPLY: CODE RESPONSES IN THE ORDER THEY ARE

GIVEN

X6424 R's Home; (Orginally \*YOUR HOME)

X6425 \*STOCKS

X6426 \*BONDS

X6427 \*MUTUAL FUNDS

X6428 \*MONEY MARKET FUNDS

X6429 \*BUSINESS

X6430 \*OTHER REAL ESTATE

X6431 \*OTHER KIND OF ASSET

1. Checked (only for X6424-X6430)

5. Not checked

9. Life insurance (X6431 only)

10. Artwork, antiques, jewelry and related goods (X6431 only)

15. Pension account, n.f.s. (X6431)

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5;

no other assets: X6423^=1)

X6432 Roughly how much in total does he have in (this asset/these assets)?

Roughly how much in total does she have in (this asset/these assets)?

Roughly how much in total do they have in (this asset/these assets)?

Code amount

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5;

no other assets: X6423^=1)

X6433 Did you include this amount in the assets you told me about

earlier in this interview?

INTERVIEWER: IF R ONLY TOLD ABOUT PART, MAKE NOTE

(Where did you tell me about (this asset/these assets)?)

3. \*YES, amount edited out earlier

4. \*YES, but no apparent match in the data: nothing changed

5. \*NO

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5;

no other assets: X6423^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

X6435 What share of this home does he own?

What share of this home does she own?

What share of this home do they own?

Code percent \* 100

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5;

does not own part of R's home: X6424^=1)

X6436 What is the present value of this home? I mean, about what

would it bring if it were sold today?

Code amount

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5;

does not own part of R's home: X6424^=1)

X6437 What is the amount still owed on all the mortgages, land

contracts, and loans on the home?

Code amount

-1. Nothing

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5;

does not own part of R's home: X6424^=1)

X6438 Does he have any (other) debts?

Does she have any (other) debts?

Do they have any (other) debts?

INTERVIEWER: IF R ASKS: DO NOT INCLUDE MORTGAGE ON R's HOME

1. \*YES

5. \*NO

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5)

X6439 Roughly how much in total are these debts?

Code amount

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5;

no non-mortgage debts: X6438^=1)

X6440 Did you include these debts when you told me about the

household debts earlier in this interview?

INTERVIEWER: IF R ONLY TOLD ABOUT PART, MAKE NOTE

(Where did you tell me about these debts?)

3. \*YES, amount edited out earlier

4. \*YES, but no apparent match in the data: nothing changed

5. \*NO

0. Inap. (no HH members outside the primary economic

unit: X113^=5 and X119^=5 and X125^=5 and X131^=5 and

X137^=5 and X207^=5 and X213^=5 and X219^=5 and X225^=5;

no non-mortgage debts: X6438^=1)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

NOT INCLUDED IN THE PUBLIC DATA SET

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

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WRAPUP QUESTION

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Thank you for your time and cooperation. This is the end

of the structured interview. Were any of the questions

difficult for you to answer?

IF YES: Which ones?

(Response entered verbatim)

Is there anything important missing in the way you

described your finances?

IF YES: Please tell me more.

(Response entered verbatim)

Is there anything you would like to add to any of the

subjects we've discussed?

INTERVIEWER: PLEASE THANK THE RESPONDENT!

X7398 TIMESTAMP

Code length of interview in seconds

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September 26, 2006