Income and Assets (IAQ): Existing section below has been replaced with new items

| Variable Name |  | Questio <br> n type | Question text/description | Code list | Text Fill Logic | Input mask | Routing |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | BOXIA1A | fouting | IF (SP IS IN THE EXIT SAMPLE AND PREVHOUS ROUND HNTERNEW WAS NOT SKIPPED), GOTOIAINT8 SPSEINHH. ELSEGOTO IAINTRO IAINT. |  |  |  |  |
| SPSEINHH | HANT8 | eode 1 | WAS sp's spouse living Inthe HOUSEHOLD DURING THIS ROUND? | $\begin{aligned} & (-1) \text { YES } \\ & (-2) \text { NQ } \\ & (-8) \text { Don't } \\ & \text { Know } \end{aligned}$ |  |  | +AINT9ADLTINHH |
| ADLTINHH | HAINT9 | eode 1 | BESIDES SP (AND SP'S SPOUSE), WAS ANY OTHER ADULT, AGE 15 OROLDER, LIVINGINTHE HOUSEHOLD DURING THIS ROUnd? | $\begin{aligned} & (01) \text { YES } \\ & (-2) \text { NQ } \\ & (-8) \text { Don't } \\ & K \end{aligned}$ |  |  | $\begin{aligned} & \text { +AINTRO- } \\ & \text { HAINT } \end{aligned}$ |
| IAINF | tAINTRO | noentry | Now havesomequestions about (PREVIOUS YEAR) income and other financial resources for you/(SP)/you and your (wife/husband)/(SP) and (his/her) (wife/husband)]. <br> As with all information collected by the MCBS, the data are eonfidential and covered by the Privacy Act of 1974. Your answers will be combined with those of other respondents, and [your/his/her] Medicare benefits will not be affected in any way by your answers to these questions. GIVE BROCHURE TO RESPONDENT. ALLOW AFEW MINUTES FOR RESPONDENT TO REVIEW BROCHURE IF NECESSARY. | (01) CONTINUE (7) Empty | [you] respondent is SP, not married (HSP)] respent is proxy, SP net married [you and your] respondent is SR, SR married <br> [Wife] SP's spouse female <br> thusband SD's spouse mate <br> [(SPP)] respondent is proxy <br> [his] SP mate <br> [her] SP female <br> [Wife] SP's spouse female <br> thusband SD's spouse mate [yourl respondent is SP <br> [his] respondent is proxy, SP mate [her] respondent is proxy, SR female |  | +AINTRO1 tAINT1 |



| SSIPROBE | HA1A | Hist | In (PREVIOUS YEAR), did tyou/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)]... <br> receive Supplemental Security Income, which is also called SSI, or SocialSecurity Disability/nsurance, atso called SSDI? | (01) YES <br> (02) NO <br> (8) Don't <br> Kn <br> (-9) Refused | [Youl respondent is SD, not married [(SP)] respondent is proxy, SP not married [you or yourl respondent is SP, SP married <br> [wife] SP's spouse femate <br> [husband] SP's spouse male <br> (HSP)] respondent proxy <br> [his] SP mate <br> ther] SP female <br> [wife] SP's spouse femate <br> [husband] SP's spouse male | H1A DISAPROB |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| DISAPROB | HA1A | Hist | In (PREVIOUS YEAR), did tyou/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)... <br> receive any disability payments tothen Social Security, SSDT, and/or Railroad Retirement)? | (01) YES <br> (O2) NO <br> (-8) Don't <br> Know <br> (-9) Refused | [youl respondent is SP, not married [(SPR)] respondent is proxy, SP not married <br> [you verl respone is SD, SP married <br> [wife] Sp's spouse femate <br> [husband] SP's spouse male <br> [(SPR)] respond is proxy <br> [his] SP mate <br> ther] SP female <br> [wife] SP's spouse femate <br> [husband] SP's spouse male | $\begin{aligned} & \text { YA1A } \\ & \text { PENPROBE } \end{aligned}$ |
| PENPROBE | HA1A | Hist | In (PREVIOUS YEAR), did [you/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)]... <br> receive any retirement or survivor pension or annuity (other than SocialSecurity or Railroad Retirement)? | (01) YES <br> (02) NO <br> (-8) Don't <br> Know <br> (-9) Refused | [youl respondent is SP, not married [(SP)] respondent is proxy, SP not married [you or your] respondent is SP, SP married <br> [wife] SP's spouse femate <br> [husband] SP's spouse male <br> (HSP)] respondent is proxy <br> [his] SP mate <br> ther] SP female <br> fwife] SP's spouse femate <br> [husband] SP's spouse male | IA1B- JOBPROBE |
| ЭOBPROBE | +A1B | Hist | m(PREVOUS YEAR), did [you/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)].... <br> Work at job or business for pay? That is, did [you/he/she/he or his wife/she or her husband/you or your (wife/husband)] receive income by working for an employ or by being self employed, such as owning a business, professial practice, of farm? | (01) YES <br> (O2) NO <br> (-8) Don't <br> Know <br> (-9) Refused | [you] respondent is SP, not married [(HSP)] respent is proxy, SP net married [you- or yourl respone is SP, SR married [wife] SP's spouse female [husband] SP's spouse male [(SP)] respondent is proxy [his] SP mate [her] SP female [wife] SP's spouse female [husband] SP's spouse male | HA1BWELPROBE |


| WELPROBE | +A1B | Hist | hn(PREVIOUS YEAR), did [you/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)]... <br> receive any income from public assistance or welfare from the state or local welfare office? Please include programs such as Femporary Assistance for Needy Families, or TANF, and food stamps. | (01) YES <br> (02) NO <br> (8) Don't <br> Know <br> (-9) Refused | [youl respondent is $S P$, net married [(SP)] respondent is proxy, SP not married [you or your] respondent is SP, SP married <br> [wife] SP's spouse femate <br> [husband] SP's spouse male <br> [(FSP)] respondent is proxy <br> [his] SP mate <br> [her] SP female <br> fwife] SR's spouse femate <br> thusband SP's spouse mate | +A1BRELPROBE |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| RELPROBE | +A1B | Hist | ma(PREVIOUS YEAR), did [you/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)]... <br> receive financialassistance from relatives or friends? | (01) YES <br> (O2) NO <br> (8) Don't <br> K now <br> (-9) Refused | [youl respondent is SP, net married [(SP)] respondent is proxy, SP not married fyou or yourl respont is SP, SR married [wife] Sp's spouse femate [husband] SP's spouse male (HSP)] respondent is proxy [his] SP mate [her] SP female (Wwife) SD's spouse female [husband] SP's spouse male | $\begin{array}{\|l\|l\|l\|} \text { HA1B } \\ \text { HRAWD } \end{array}$ |
| HRAWD | +A1B | Hist | In (PREVIOUS YEAR), did tyou/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)]... <br> convert or withdraw any funds from an IRA, Keogh, 401K, or other retirement savings aceunt in (PREVIOUS YEAR)? | (01) YES <br> (02) NO <br> (8) Don't <br> Kn <br> (-9) Refused | [Youl respondent is SP, not married [(SP)] respondent is proxy, SP not married <br> [you or your] respondent is SP, SP married <br> [wife] Sp's spouse femate <br> [husband] SP's spouse male <br> (HSP)] respondent is proxy <br> [his] SP mate <br> ther] SP female <br> [wife] Sp's spouse femate <br> [husband] SP's spouse male | taic <br> STOKPRRB |
| STOKPROB | HA1E | Hist | In (PREVIOUS YEAR), did [you/(SP)/you your (wife/husband)/(SP) or (his/her) (wife/husband)]... <br> receive any dividends from any investments in stocks or mutuat funds or other investments? | (01) YES <br> (O2) NO <br> (-8) Don't <br> Know <br> (-9) Refused | [youl respondent is SP, not married [(SP)] respondent is proxy, SP not married [you yourl respont is SP, SP married <br> [wife] SP's spouse female <br> [husband] SP's spouse male <br> [(SSP)] respondent is proxy <br> [his] SP mate <br> ther] SP female <br> fwife] SR's spouse femate <br> [husband] SP's spouse male | HA1C <br> LUMPPROB |


| LUAPPROB | HA16 | Hist | In (PREVIOUS YEAR), did (Hou/(SP)/y (wiffe/husband)/(SP) or (his/her) (wiffe/husband)]... <br> receive alump sum or anyonetime payments such as alife insurance or pension settlement, inheritanec, or a capital gain from the sale of securities, property, of abusiness? | $\begin{aligned} & (-1) \text { YES } \\ & (-2) \text { NO } \\ & (-8) \text { Don't } \\ & \text { K } \\ & \text { K } \\ & (-9) \text { Refused } \end{aligned}$ |  | HAIC- <br> ESTPROBE |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| ESTPROBE | HALE | Hist | hn(PREVHOUS YEAR), did [you/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)]... <br> receive any regular payments from estates, trusts, annuities (other than pensions), life insuranee, of foyalties? | $\begin{aligned} & (01) \text { YES } \\ & (02) N O \\ & (-8) \text { Don't } \\ & \text { Kow } \\ & (-9) \text { Refused } \end{aligned}$ |  | hate PROPRENT |
| Proprent | Hale | Hist | hn(PREVMOUS YEAR), did tyou/(SP)/your your (twife/husban)/(SR) (his/her) (wife/husband)]... <br> receive any income from the rental of properties? | (01) YES <br> (O2) NO <br> (-8) Don't <br> K <br> (-9) Refused |  | $\begin{aligned} & \text { †A13- } \\ & \text { OTHPROBE } \end{aligned}$ |
| OthProbe | +A13 | code 1 | Not including anything you'veatready told meabedid [you/(SP)/you ryour (twife/husban)/(SP) (his/her) (wife/husband)) receive ineomefrom any ther sources, such as Department of Veterans $A$ ffairs payments, worker's or等 child support, or alimeny? | $\begin{aligned} & (01) \text { YES } \\ & (02) \text { NO } \\ & (-8) \text { Don't } \\ & \text { Know } \\ & (-9) \text { Refused } \end{aligned}$ |  | BOx/A1 |


|  | B0xiat | fouting | HFAT LEAST ONE INCOME PROBE AT IA1A, IA1B, IA1C, OR IA13 WAS ANSWERED "YES",GOTOMA14 incyramat. ELSEGOTOBOXIAZAA. |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| - |  | (1) | SHOW CARDIAI <br> Faking allof these income sources into account, please estimate[your/(SP's)/you and your (wife's/husband's)/(SP) and (his/her) (wife's/husband's) income for (PREVUOUS YEAR). <br> PPROBE: In estimating (your/his/her/their) totalineome you can respond for all of (PREVOUS YEAR), Or, if you prefer, provide a one month estimate.] <br> PPROBE: REVIEW THESE SOURCES WITH RESPONDENT: [Social Security or Railroad Retirement/ (SSI/SSDI)/disability/pensions/job, business, professional practice, farm/public assistance programs/assistance from relatives or friends/withdrawat from retirement or savings/dividends/lump sum payments/other regular payments/rental properties/other | (01) fContinuous answer. (8) Don't Know | [yourl respondent is SP, not <br> married <br> H(SP's)] renent is proxy, SP net <br> married <br> fyourd resplent is SP <br> married <br> [wife's] SP's spouse femate <br> thusband's] SP's spouse mate <br> [(SP)] respondent is proxy <br> [his] SP mate <br> [her] SP femate <br> twife's] SP's spouse famate <br> [husband's] Sp's spouse mate <br> [your] respont is SP <br> [his] respondent is proxy, SP mate, <br> SP not married <br> [herl respent is proxy, SR <br> femate, SP not married <br> [their] respendent is proyy, SR | ta14 |


| INCYRUNT | tA14 |  | SHOW CARD IA1 <br> Faking allof these income sources into account, please estimate tyour/(SD's)/you and your (Wife's/husband's)/(SP) and (his/her) (wife's/husband's)] income for (PREVIOUS YEAR). <br> [PROBE: In estimating (your/his/her/their) totalincome you can respond for all of (PREVUOUS YEAR), Or, if you prefer provide a one month estimate.] <br> PPROBE: REVIEW THESE SOURCES WITH RESPONDENT: [Social Security or Railfrad Retirement/ (SSI/SSDI)/disability/pensions/job, business, professionalpractice, farm/public assistanceprograms/assistance from relatives or friends/withdrawat from retirement or savings/dividends/lumpsum payments/other regular payments/rental properties/other sourcesll | (01) TOTAL FOR (PREVIOUS YEAR) (02) ONE AMONTH (8) Don't Know (-9) Refused | [your] respondent is SP, not married [(SP's)] respondent is proxy, SP net married [you and your] respondent is SP, SP married [Wife's] SP's spouse female [husband's] SP's spouse mate [(SP)] respondent is proxy [his] SP male ther] SP female [Wife's] SP's spouse female [husband's] SP's spouse male [your] respondent is SP [his] respondent is proxy, SP male, SP not married Ther] respondent is proxy, SP female, SP not married [their] respondent is proxy, SP married | (01) BOX <br> tazaA <br> (O2) BOK <br> tAZAA <br> (8) 1 A15 <br> INCYRMTI <br> (9) 1 A15 <br> INCYRMTI |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| INCYRMT1 | tA15 | code 1 | Was it more than $\mid \$ 20,000 / \$ 1,700 / \$ 40,000 / \$ 3,300)$ $?$ | (01) YES <br> (02) NO <br> (8) Don't <br> Know <br> (-9) Refused |  | $\begin{aligned} & (01) \text { BOK } \\ & \text { HAZAA } \\ & (02) \text { IA16 } \\ & \text { HACYRATZ } \\ & (-8) \text { BOK } \\ & \text { HZAAA } \\ & (-9) B O K \\ & \text { HZAA } \end{aligned}$ |
| \#NCYRMTZ | HA16 | code 1 | $\begin{aligned} & \text { W m } \\ & (\$ 12,000 / \$ 1,000 / \$ 25,000 / \$ 2,000) \\ & ? \end{aligned}$ | (01) YES <br> (02) NO <br> (-8) Don't <br> Know <br> (-9) Refused |  | (O1) BOX <br> tAZAA <br> (02) IA17- <br> hacyramz <br> (8) BOX <br> tazaA <br> (-9) BOX <br> HAZAA |
| HCYRAM3 | +A17 | code 1 | Was it more than <br> (\$7,700/\$640/\$17,000/\$1,400)? | (01) YES <br> (02) NO <br> (8) Don't <br> Know <br> (-9) Refused |  | BOXIA2AA |


|  | $\begin{aligned} & B O X \\ & +A Z A A \\ & \hline \end{aligned}$ | fouting |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| HHINCOAAE | HA17A | ede | SHOW CARDIAZ <br> According to our records, other than [you/(SP)/you and your (wife/husband)/(SP) and (his/her) (wife/husband) , at least one person 15 years of age or older Hives in (your household/the household). Including their income as wellas [your/(SD's)/you and your (wife's/husband's)/(SP) and (his/her) (wife's/husband's)] income, pleaselook this card and tell me which letter represents the totambinedincome of all the members of [your household/(SP's) household). This includes ineome from jobs, Social Security, Railroad Retirement, other retirement, and any other money income received by all members of (your household/the houseld). |  | [you] respendent is SP, not married <br> [(SP)] respondent is proxy, SP not <br> married <br>  <br> married <br> [wife] SP's spouse fomate <br> [husband] SP's spouse male <br> [(SP)] respondent is proxy <br> [his SP mate <br> [her] SP femate <br> [wife] SP's spouse femate <br> [husband] SP's spouse male <br> [your household] respondent is Sp <br> [the household] respondent is <br> proxy <br> [you) respent is Sp <br> the] respondent is proxy, SP male, <br> not married <br> [she] respondent is proxy, SR <br> female, not married <br> [they] respondent is proxy, SP <br> married <br> [your househeld respent isp <br> [(SP's) household] respondent is <br> 有 <br> [your household] respondent is SP [the household] respondent is <br> proxy | +A18A Homeprab |


| HOMEPRBB | H18A | code 1 | IF THE SP IS HOMELESS, IS FRANSIENT WITH NO PERMANENT HOME, OR IS INJALL OR PRISON, GODE WITHOUT ASKING. SELECT" SP IS HOMELESS/TRANSIENT/IN JAILOR PRISON". <br> The next questions are about the place where [you/(SP)/you and your (wife/husband)/(SP) and (his/her) (wife/husband)] (Hive/lives/lived). <br> (Do/Did/Does) [you/(SP)/you and Your (wife/husband)/(SP) and (his/her) (wife/husband) I] own the place where (you/he/she/they) (Hive/lives/lived), or (do/did/does) (rou/he/she/they) rent it? | (01) OW <br> (02) RENT <br> (O3) DOESN'T <br> ownorrent <br> (-4) BOTH <br> OWN AND <br> RENT <br> (05) SR <br> REPORTED <br> SUBSHDZED <br> RENTAL <br> housing <br> (O6) SP IS <br> HOMELESS/TR <br> ANSIENT/AN <br> JAILOR PRISON <br> (8) Don't <br> Know <br> (-9) Refused | [(SPP)] respondent is proxy, SP not married <br> [you and your] respondent is SP, SR married <br> [Wife] SP's spouse female <br> thusband] SP's spouse male <br> [(fSP)] respon is proy <br> [his] SP mate <br> [her] SD femate <br> [Wife] SP's spouse female <br> [husband] SP's spouse male <br> Hivel respont is SP <br> [lives] respondent is proxy <br> Hived] SP has no permanent home <br> [Do] respondent is SR <br> [Did] SP has no permanent home or <br> SP deceased <br> [Does] respondent is proxy <br> [youl respont is SP, not married <br> [(SPR)] respondent is proxy, SP not <br> married <br> [you and your] respondent is SP, SP married <br> [wife] SD's spouse female <br> [husband] SP's spouse male <br> H(SP) respory is pry <br> [his] SP male <br> [her] SP femate | (01) IA19HOMEEVAL (02) IA22 HOMERENT (03) IAINTRO4 HANT4 (04) DO NOT DISPLAY. DATA EDITING ONLY. (-5) 00 NOT PHSPLAY. DATA EDITING ONLY. (06) HAINTRO4 HAINT4 (8) halntronHAINT4 (-9) IAINTRO4 HAINT4 |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| HOMEEVAL | HA19 | dollar | Phease tell me the present value of tyour/(Sp's)/you and your (Wife's/husband's)/(SP) and (his/her) (wife's/husband's)] home. About how much do you think this (house and tot/condominium unit) would selt for if it were sale? Please give your best estimate. | (01) <br> EContinuous anser <br> (8) Don't <br> Know <br> (9) Refused | [your] respondent is SP, not <br> married <br> [(SS's)] respond is proxy, SP not <br> married <br> [you and your] respondent is SP, SR <br> married <br> [wife's] SP's spouse female <br> [husband's] Sp's spouse mate <br> [house and lot] SP lives in house <br> feonodominium unit] SP lives in <br> condominium | H220- <br> HOMEMOR <br> $\mp$ |


| HOMEMORF | H220 | eode 1 | (-Do/Did/Does) [you/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)] have a mortgage, deed of trust, home equity loan, or a land contract on the property? | (01) YES <br> (-2) NO <br> (8) Don't <br> Know <br> (-9) Refused | [Do] respent is SP <br> [Did] SP no longer has permanent home or SP deceased [Does] respondent is proxy [you] respondent is SP, not married (HSP)] respont is proxy, SP not married <br> fyou oryurl respondent is SP, SR married <br> [Wife] SP's spouse female <br> Thusband SP's spouse male <br> [(SP)] respondent is proxy <br> this] SP mate <br> ther] SP female <br> [Wife] SP's spouse female <br> thusband SP's spouse mate | (01) IA21 <br> HOMEOWE <br> (O2) <br> IAINTRO4- <br> IAINT4 <br> (8) <br> HAINTRO4- <br> HAINT4 <br> (-9) <br> tAINTRO4- <br> HAINT4 |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| HOMEOWE | H21 | dollar | How much (do/did/does) tyou/(SP)/you and your (wife/husband)/(SP) and (his/her) (wife/husband)]owe, in total,on any mortgages, deeds, loans, of tand contracts for this property? | (01) <br> FContinuous answer. <br> (f) Don' <br> Know <br> (-9) Refused | [Do] respondent is SP <br> [Did] SP no-longer has permanent <br> home or SP deceased <br> [Does] respondent is proxy <br> [you] respondent is SP, not married <br> [(SSP)] respondent is proxy, SP not <br> married <br> [you or your] respondent is SP, SP <br> married <br> [Wife] SP's spouse female <br> thusband SP's spouse male <br> [(SPR)] respondent is proxy <br> [his] SP male <br> ther] SP femate <br> [Wife] SP's spouse female <br> thusband SD's.spouse male | $\begin{aligned} & \text { +AINTRO4- } \\ & \text { HAINT4 } \end{aligned}$ |


| Homerent | H22 | dellar | How much monthly rent (do/did/does) (you/(SP)/you and your (wife/husband)/(SP) and (his/her) (wife/husband)] pay for the place where (you/he/she/they) (hive/lives/ived)? | (01) <br> Continus answer. <br> (-8) Don't <br> Know <br> (-9)Refused |  | IAINTRO4 hant4 |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| HINT4 | HAINTRO4 | no entry | How, let's turn to savings or other assets which can be used to provide income. I will ask whether THu/(SP)/yound yur (wife/husband)/(SP) and (his/her) (wife/husband)] had particular types of assets in (PREVIOUS YEAR). All these questions can be answered with a "yes" or a "no". IPlease answer for [you and your (wife/husband)/(SP) and (his/her) (wife/husband)]. |  | [you] respondent is SP, not married [(SP)] respondent is proxy, SP not married [you and your] respondent is SP, SR married [wife] SP's spouse female Thusband] SP's spouse mate H(SP) I respent is proxy [his] SP mate <br> [her] SP femate (Wwife) Sp's spouse female [husband SP's spouse male Hournd your) is SP, SR married [wife] SP's spouse femate thusband SP's spouse male H(SP) Hespondent is proxy [his] SP mate Ther] SP femate twife] Sp's spouse femate [husband] SP's spouse male |  |


| RAPROBE | HA23A | Hist | For all or part of (PREVIOUS YEAR), did [you/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)]... <br> have any IRA, Keogh, 401K zecounts, thrift plans, or other retirement savings accounts? | (01) YES <br> (02) NO <br> (8) Don't <br> Know <br> (-9) Refused | [Youl respondent is SD, not married [(SP)] respondent is proxy, SP not married [you or yourl respondent is SP, SP married <br> [wife] SP's spouse femate <br> [husband] SP's spouse male <br> (HSP)] respondent proxy <br> [his] SP mate <br> ther] SP female <br> [wife] SP's spouse femate <br> [husband] SP's spouse male | haz3A <br> SAVPROBE |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| SAVPROBE | HA23A | Hist | For all or part of (PREVIOUS YEAR), did [you/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)]... <br> have money in any kind of savings, interest earning checking, of other bank account? Include checking, savings, money market funds, eertificates of deposit, or any other interest earning bank accounts. | (01) YES <br> (O2) NO <br> (8) Don't <br> Know <br> (-9) Refused | [youl respondent is SP, not married [(SPR)] respondent is proxy, SP not married <br> [you verl respone is SD, SP married <br> [wife] Sp's spouse femate <br> [husband] SP's spouse male <br> [(SPR)] respond is proxy <br> [his] SP mate <br> ther] SP female <br> [wife] SP's spouse femate <br> [husband] SP's spouse male | $\left\lvert\, \begin{aligned} & \text { IA23A } \\ & \text { BONDPROB } \end{aligned}\right.$ |
| BONDPROB | H233A | Hist | For all-or part of (PREVIOUS YEAR), did [you/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)... <br> have anystocks, mutual funds, municipal or corporate bonds, of U.S. Government securities such as savings bonds, treasury bills of bonds? | (01) YES <br> (02) NO <br> (8) Don't <br> Know <br> (-9) Refused | [You] respondent is SP, not married [(SP)] respondent is proxy, SP not married fyou or yourl respondent is SP, SP married <br> [wife] SP's spouse femate <br> [husband] SP's spouse male <br> (HSP)] respont is proxy <br> [his] SP mate <br> ther] SP female <br> fwife] SR's spouse femate <br> thusband SP's spouse mate | $\left\lvert\, \begin{aligned} & \text { IA } 23 A \\ & \text { INSPROBE } \end{aligned}\right.$ |
| INSPROBE | HA23A | Hist | For all-or part of (PREVIOUS YEAR), did [you/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)]... <br> own any life insurance policies which build up cash equity fsometimes called whele life or universallife)? | (01) YES <br> (O2) NO <br> (8) Don't <br> Know <br> (9) Refused | [you] respondent is SP, net married [(SP)] respondent is proxy, SP not married tyou yourl respont is SP, SP married [Wife] SP's spouse femate <br> [husband] SP's spouse male (HSP)] respondent proxy <br> [his] SP mate <br> [her] SP female <br> fwife] SP's spouse femate <br> [husband] SP's spouse male | 1A23BPROPPROB |


| PROPPROB | H23B | Hist | For allor part of (PREVIOUS YEAR), did [you/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)]... <br> own any property, fother than (tyour/his/her/their) primary residene, such home, apartment house, eommerial property, or rental property? | $\begin{aligned} & (01) \text { YES } \\ & (02) \text { NQ } \\ & \text { (8)Don't } \\ & \text { Kn } \\ & \text { (9) Refused } \\ & \hline \end{aligned}$ | [you] respondent is SP, not married <br> [(SP)] respondent is proxy, SP not married <br> [you or your] respondent is SP, SR married <br> twife] Sp's spouse femate <br> Thusband Sp's spouse male <br> H(SP) Hespone is proxy <br> [his] SP mate <br> Ther] SP female <br> twife] Sp's spuse femate <br> thusband SP's spouse male <br> [yourl respont is SP <br> [his] respondent is proxy, SP male, <br> SP not married <br> Ther] respont is proxy, SP <br> female, SP not married <br> [their] respont is proxy, Sp <br> married | +A23BGARPROBE |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| EARPROBE | H23B | Hist | For allor paf (previous Yent), did [you/(SP)/you or your (wife/husbad)/(SP) or (his/her) (wife/husband)]... <br> own anyears, trucks, reereatinat wehicles, or boats? | $\begin{aligned} & (01) \text { YES } \\ & (02) \mathrm{NQ} \\ & (-8) \text { Don't } \\ & \text { Kn } \\ & \text { (-9) Refused } \\ & \hline \end{aligned}$ | [youl respondent is $S P$, not married <br> [HSP)] respondent is proxy, SP not <br> married <br> [Youry respors. SP, SR <br> married <br> [wife] SP's spouse fomate <br> [husband SP's spouse mate <br> H(SP) I respon is proxy <br> [this] SP male <br> Ther] SP femate <br> Twife] Sp's speuse femate <br> thusband SP's spouse male | HA23BAStPROBE |
| ASTPROBE | +A23B | Hist | For allor part ff (PREVIOUS YEAR), did [you/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husa)]... <br> have any other savings, wosets,a business or professional practice, propertysuch as a farm, mortgages from which payments are received, or any other financial investments no already mentioned? | $\begin{aligned} & (01) \text { YES } \\ & (02) \text { No } \\ & (-8) \text { Don't } \\ & \text { Know } \\ & (-9) \text { Refused } \\ & \hline \end{aligned}$ | [youl respondent is SP, not married <br> H(SP) $]$ respondent is proxy, SP not <br> married <br> Hou your respent is SP <br> married <br> [wife] Sp's spouse femate <br> [husband SP's spouse male <br> [(SP)] respondent is proxy <br> [his] SP mate <br> [her] SP female <br> [wife] SP's spouse female <br> thusband SP's spouse mate |  |


| ASTCODE | HA30 | code at | What of asset is it? CHECK ALL THAT APPLY. | (01) SAVINGS <br> (02) ASSETS <br> (03) FAran <br> (04) BUSINESS <br> (05) <br> professional <br> practice <br> (91) other <br> (-8) Don't <br> Know <br> (-9) Refused |  | (-1) BOX <br> HAZ <br> (02) DATA <br> editing <br> ONLY.DO <br> NOT <br> DISPLAY. <br> (03) BOX <br> tAZ <br> (04) BOX <br> H2 <br> (O5) BOX <br> HAZ <br> (91) IA30- <br> ASTSPECT <br> (8) BOKIAZ <br> (-9) BOXIAZ |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | BOX IAz | fouting | IF AT LEAST ONE ASSET PROBEAT haz3a or IAzzb WAS answered "YES", GOTOTA31 ASSTTOTL. ELSEGOTO Haz4 OTHDEBTS. |  |  |  |
| ASSTTOTt | HA31 | dolllar | show cardiaz <br> You've mentioned [READ ASSETS HSTED BELOW]. Please estimate Hour/(Sp's)/yourd your (WWife's/husband's)/(SP) and (his/her) (wife's/husband's) assets for (PREVIOUS YEAR). DO not include interest or dividend paymedrear income. [Please exelude the valueef (your/his/her/their) heme.] <br> ffretirement savings accunts/otherbank accounts/stocks, mutual funds, bonds/life insuranee policies/other property/vehicles/other assets) | (01) Coontinuous anser. (-8) Don't Kn (-9) Refused | [your] respondent is SP, not married <br> H(SP's)] respondent is proxy, SP not married <br> [you and your] respondent is SP, SP married <br> twife's] Sp's speuse femate <br> [husband's] Sp's spouse mate <br> H(SP) I respent is prour <br> [this] SP mate <br> Ther] SP female <br> [wife's] Sp's spouse femate <br> [husband's] SD's spouse mate <br> [yourl respent is SP <br> [his] respondent is proxy, SP mate, <br> SP not married <br> [her] rest is proxy, SP <br> femate, SP not married <br> [their] respondent is proxy, SR <br> married | (01) IA32 ASSTDEBT (8) HA31A VALSSET (-9) IA31A VALSSET |


| VALSSEF | A331A | code 1 | It is often difficult to place an exact dollar am the value of assets. Thinking about all of the assets that you mentioned, [READ ASSETS LISTED BELOW, Would you <br> say that the total value of tyour/(SD's)/you and your (wife's/husband's)/(SP) and (his/her) (wife's/husband's)] assets for (PREVOUS YEAR) was less than $\$ 40,000.00$ or was it $\$ 40,000.00$ or more? <br> Hfretirement savings accunts/other bank accounts/stocks, mutual funds, bonds/life insurance policies/other property/vehicles/other assets) <br> [READ IF NECESSARY: Again do not inelude interest or dividend payments already reportedas income $[$, and please exlude the *alue of (your/his/her/their) homell. | (01) LESS THAN <br> $\$ 40,000.00$ <br> (02) <br> $\$ 40,000.00$ OR <br> AMORE <br> (8) Don't <br> Know <br> (-9) Refused | [your] respondent is SP, not <br> married <br> H(SP's)] respondent is proxy, SP not <br> married <br> [yuand is SP, SP <br> married <br> [Wwife's] Sp's spouse femate <br> [husband's] Sp's spouse male <br> [(SP)] respondent is proxy <br> [this] SP mate <br> [her] SP female <br> [Wife's] SP's spouse femate <br> [husband's] SP's spouse male <br> [yourl respont is SR <br> [his] respondent is proxy, SP male, <br> SP not married <br> Ther] respory , PR <br> female, SP not married <br> [their] respondent is proyy, SR <br> married | (01) \|A31B \#ALPICK <br> (02) IA31B VALPICK <br> (4) HA32 ASSTDEBT <br> (-9) IA32 ASSTDEBT |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| YALPICK | HA31B | code 1 | show cardia4 <br> Which of these categories do you think is a good estimate of the total value f $\left[y \operatorname{lr} / /\left(S \mathrm{~S}^{\prime} \mathrm{s}\right) / \mathrm{you}\right.$ and your (wife's/husband's)/(SP) and (his/her) (wife's/husband's)l wossets for (PREVIOUS YEAR)? <br> FREAD HF NECESSARY: You mentioned the following assets: [READ ASSETS LISTED BELOW].] <br> Hfretirement savings accounts/other bank aceounts/stocks, mutual funds, bonds/life insuranee policies/other property/vehicles/other assets) | $(01)$ A. Less than $\$ 5,000$ $(02)$ B. $\$ 5,000$ 9,999 $(03)$ C. $\$ 10,000$ 19,999 $(-04) D . \$ 20,000$ $-39,999$ $(05)$ E. $\$ 40,000$ 74,999 $(06)$ F. $\$ 75,000$ 149,999 $(07) G$. $\$ 150,000$ $z 99,999$ $(08) H$. $\$ 300,000$ and more (8) Don't Know (9) Refused | [Do] respondent is SP <br> [Did] respondent is proxy, SR <br> deced <br> [Does] respondent is proxy, SR alive <br> [you] respondent is SP, not married <br> $[(S P)]$ respondent is proxy, SP not <br> married <br> [you your) respont is SR, SR <br> married <br> [wife] SP's spouse femate <br> [husband] SP's spouse male <br> H(SP)] respond is prow <br> [this] SP male <br> Ther] SP femate <br> [Wwife's] SP's spouse femate <br> [husband's] SP's spouse male | $\left.\right\|_{\text {ASSTDEB }} ^{\text {A32- }}$ |


| ASSTDEBT | H32 | code 1 | (Do/Did/Does) [you/(SP)/you or <br>  (his/her) (wife/husband)] have any outstanding debts associated with the REEAD ASSETS HSTED BELOW]? <br> Hretirement savings accounts/other bank aceounts/stocks, mutual funds, bondslife insurane policies/other property/vehicles/other assets)/ | $\begin{aligned} & (01) \text { YES } \\ & (02) \text { NO } \\ & \text { (8) Don't } \\ & \text { (n) } \\ & (-9) \text { Refused } \end{aligned}$ | [Do] respondent is SP <br> [Did) respent is proxy, SR <br> deceased <br> [Does] respondent is proxy, SP alive <br> [youl respent is SP, not married <br> [(SP)] respondent is proxy, SP not <br> married <br> [you or your] respondent is SP, SR <br> married <br> Twife] SP's spouse femate <br> Thusband] SP's spouse mate <br> H(SP) I respent is prour <br> [this] SP mate <br> [her] SP female <br> [wife's] Sp's spouse femate <br> [husband's] SP's spouse male |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| ADEBTTOF | 1A33 | dollar | How much (do/did/doest <br> [you/(SP)/you and your (wife/husband)/(SP) and (his/her) (wife/husband)] owe, in total, on these debts? | (01) <br> fontinuous <br> answer. <br> (8) Don't <br> Know <br> (-9) Refused | [dol respendent is Sp <br> tdid read is proxy, Sp <br> deceased <br> [does] respondent is proxy, SP alive <br> tyou respendentis Sp , not married <br> H(HP) ${ }^{\text {respondent is proxy, SP not }}$ <br> married <br> [you and your] respondent is SP, SP <br> married <br> [wife] Sp's spouse female <br> thusband SP 's spouse mate <br> HSP) <br> [hist SP mate <br> ther]SP femate <br> [wife] Sp's spouse female <br> Thusband] SP's spouse mate | HA34- <br> OTHDEBTS |


| OTHDEBTS | H34 | code 1 | (Dordid/Des) (you/(Sp)/your Your (wife/husband)/(SP) or (his/her) (wife/husband) have any fother) outstanding debts (that we haven't talked about), such as eredit card charges, trans, medical bills, or legal bills? | $\begin{aligned} & (01) \text { YES } \\ & (02) N Q \\ & (-8) D o n ' t \\ & \text { K } \\ & (-9) \text { Refused } \end{aligned}$ | [Do] respondent is SP <br> [Did] respent is proxy, SR <br> deceased <br> [Does] respondent is proxy, SP alive <br> [you) respent is SP, not married <br> [(SP)] respondent is proxy, SP not <br> married <br> [you or your] respondent is SP, SR <br> married <br> twife] SP's spouse female <br> [husband SP's spouse mate <br> H(SP) I respendent is prox <br> [this] SP mate <br> Ther] SP female <br> twife] SP's spouse female <br> [husband] SP's spouse male |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| DEBTIOT | 1A35 | dotlar | If you added up all of these other debts for [you/(SP)/you and your (wife/husband)/(SP) and (his/her) (wife/husband)), about how much would they amountoright now? | (01) CContinuous answer. (8) Don't Know (-9) Refused | [you] respondent is SP, not married <br> [(SP)] respent is proxy, SP not <br> married <br> [you and your] respondent is SP, SP <br> married <br> [wife] SP's spouse female <br> thusband SP's spouse mate <br> H(SP) I respondent is proxy <br> [his] SP mate <br> Ther] SP female <br> [wife] SP's spouse female <br> thusband IS's spouse mate | (01) IA36DEBTMED (8) BOXIA6 (-9) BOKIAG |
| DEBTMED | 1A36 | dollar | How much fhe (AMOUNT FROAA HA35) is for medical care costs? | (01) <br> fontinuous <br> answer. <br> (8) Don't <br> Kn <br> (-9) Refused |  | BOX 1 A6 |


| riab | R Screen Name | lestion type | Question text/description | Code list | Text fill Logic | put mas | uting |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Fintroi | LFINTRO1 | 10 entry | Now I have some questions about (PREVIOUS YEAR) ncome and other financial resources for (you/(SP)/you (wife/husband)]. <br> As with all information collected by the MCBS, the data are confidential and covered by the Privacy Act of 1974 Your answers will be combined with those of other respondents, and [your/his/her] Medicare benefits wil not be affected in any way by your answers to these uestions. <br> GIVE BROCHURE TO RESPONDENT. ALLOW A FEW MINUTES FOR RESPONDENT TO REVIEW BROCHURE IF NECESSARY | $\begin{aligned} & (01) \\ & \text { CONTINUE } \\ & (-7) \text { Emptry } \end{aligned}$ | [you] respondent is SP, not married <br> (SP)) respondent is proxy, SP not married <br> [you and your] respondent is SP, SP married <br> [wife] SP's spouse female <br> [husband] SP's spouse male <br> [(SP)] respondent is proxy <br> [his] SP male <br> [her] SP femal <br> [wife] SP's spouse female <br> [husband] SP's spouse male <br> [your] respondent is SP <br> [his] respondent is proxy, SP male <br> [her] respondent is proxy, SP female |  | fintro2 |
| LINTRO2 |  |  | As the brochure explains, your responses to these questions can help us determine the impact of income on your/his/her] use and access to health care. I will be asking a series of questions about [your/(SP's)/you and your (wife's/husband's)/(SP) and (his/her) wife's/husband's)] income and other financial resources. First, I will ask whether [you/(SP)/you and your (wife/husband)/(SP) and (his/her) (wife/husband)] had particular types of income or other resources. All these questions can be answered with a "yes" or a "no." Then, will ask you to estimate [your/(SP's)/their] total income. [Please answer all questions for [you and your (wife/husband)/(SP) and (his/her) (wife/husband)]. <br> Slease feel free to refer to any records or other persons who may be of assistance to you. | $\left\{\begin{array}{l} (01) \\ \text { CONTINUE } \\ (-7) \text { Empty } \end{array}\right.$ | [his] respondent is proxy, SP male <br> [her] respondent is proxy, SP female [your] respondent is SP, not married [(SP's)] respondent is proxy, SP not married [you and your] respondent is SP, SP married [wife's] SP's spouse female [husband's] SP's spouse male <br> [(SP)] respondent is proxy <br> [his] SP male <br> [her] SP female <br> [wife's] SP's spouse female <br> [husband's] SP's spouse male <br> [you] respondent is SP, not married <br> [(SP)] respondent is proxy, SP not married <br> [you and your] respondent is SP, SP married <br> [wife] SP's spouse female <br> [husband] SP's spouse male <br> [(SP)] respondent is proxy <br> Lhis SP male <br> [wife] SP's spouse female <br> [husband] SP's spouse male <br> [your] respondent is SP <br> [(SP's)] respondent is proxy, SP not married <br> [their] respondent is proxy, SP married <br> [you and your] respondent is SP, SP married <br> [wife] SP's spouse female <br> [husband] SP's spouse male |  |  |
| workwek | LF1 | code one |  |  | [you] respondent is SP <br> [(SP)] respondent is proxy <br> [beginning on Sunday (MONTH, DAY OF SUNDAY PRIOR <br> TO INTERVIEW)] TODAY'S date is a Saturday <br> [on Sunday (MONTH, DAY OF SUNDAY PRIOR TO THE SATURDAY BEFORE TODAY'S DATE\})] if TODAY'S date is not a Saturday <br> [today] TODAY'S date is a Saturday <br> [on Saturday (MONTH, DAY OF SATURDAY PRIOR TO TODAY'S DATE)] if TODAY'S date is not a Saturday |  |  |
| retnevwk | LF1B | code one | Is this because (you were/SP was) retired or (you/SP) never worked? |  | (you were) respondent is SP (SP was) ressondent is proxy |  |  |
| AABSENT | LF2 | code one | [Do you/Does SP\} have a job from which \{you were/\{he/she\} was\} absent last week because of illness, vacation, or some other reason? |  | [Do you] respondent is SP <br> [Does SP] respondent is proxy <br> [you were] respondent is SP <br> [he was] respondent is proxy, SP is male [she was[ respondent is proxy, SP is female |  |  |
| workmonth | LF3 | code one | Now think about last month, that is \{MONTH BEFORE INTERVIEW MONTH\}, Did \{you/SP\} do any work for pay at any time in the last month? |  | IVoul respondent is SP Sp Sespondent s roroxy |  |  |
| миттов | LF4 | yes/no | Last week, did \{you/SP\} have more than one job, including part-time, evening, or weekend work? |  | [you] respondent is SP [SP] respondent is proxy |  | LFS |


| Hoursperweek | LL5 | quantity unit | How many hours per week \{do you/does SP\} usually work at \{your/his/her\} \{job/main job\}? \{By main job, I mean the job at which $\{$ you work/\{he/she\} works\} the most hours.\} <br> ENTER NUMBER OF HOURS USUALLY WORK <br> IF NUMBER OF HOURS VARY EACH WEEK, ENTER 997 |  |  |  | $\left\|\begin{array}{c} (11) \text { Box LF } \\ (1-8) L \mathcal{L F} \\ (-9) L-8 \end{array}\right\|$ |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | BOX LF1 | routing | \|f LF2=1 (YEES, ABSENT LAST WEEK), go to LF7. Otherwise go to LF6. |  |  |  |  |
| Hourslastwekx | LF6 | quantity unit | How many hours did \{you/SP\} work last week? <br> ENTER NUMBER OF HOURS |  | $\underset{\text { [Youl respondenti is SP }}{\text { [SP respondent is proxy }}$ |  | $\begin{aligned} & (1) \text { LF7 LLF8 } \\ & (-8) L-88 \\ & (-9) L F 8 \\ & \hline \end{aligned}$ |
| Hourstastwekz | LF7 | quantity unit | You said \{you were/SP was\} absent from work last week. How many hours did \{you/he/she\} work the last week \{you were/\{he/she\} was\} at work? <br> ENTER NUMBER OF HOURS |  |  |  | LL8 |
| PAYSCHEDULE | LF8 | code one | \{\{Are you/Is SP\} /In \{your/SP's\} main job, \{are you/is \{he/she\} \}\}paid every week, every two weeks, two times a month, or on some other schedule? |  | [Are you] LF4 $\neq 1$ (YES), respondent is SP [ls SP] LF4 1 1(YES), respondent is proxy <br> [In your main job, are you] LF4= 1 (YES), respondent is SP [In SP's main job, is he] LF4= 1 (YES), respondent is proxy, SP male [In SP's main job, is she] LF4=1(YES), respondent is proxy, SP female |  |  |
| OSPAYSCHEDULE | LF8A | verbatim | Specify other payment schedule | $\begin{aligned} & \begin{array}{l} \text { (1) } \\ \text { [continuous } \\ \text { response] } \end{array} \\ & \hline \end{aligned}$ |  |  | $\stackrel{\text { LF }}{ }$ |
| LASTPAYCHECK | L-9 | code one | How much was \{your/SP's\} last paycheck before taxes and any other deductions \{for \{your/his/her\} main job\}? <br> IF NEEDED: We don't need an exact dollar amount. An approximate amount is fine. <br> IF NEEDED: If it is easier, you can just tell me how much \{you earn/SP earns\} per hour or per day. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. |  | [your] respondent is SP <br> [SP's] respondent is proxy <br> [for your main job] LF4=1(YES), respondent is SP for his main job] LF4=1(YES), respondent is proxy, SP is male [for her main job] LF4=1(YES), respondent is proxy, SP is female |  |  |
| раусheckamt | L-99 |  | ENTER PAYCHECK AMOUNT <br> s | $\begin{aligned} & \begin{array}{l} \text { (1) } \\ \text { [continuous } \\ \text { response] } \end{array} \\ & \hline \end{aligned}$ |  | Use input mask in response field is (s999,999) sothat dollar sign is displayed and commas are inserted appropriate y. | LF10 |


| PAYCHECKHOURLY | L99B | quantity unit | EnTer Pay Per hour | $\left\lvert\, \begin{aligned} & (1) \\ & \text { (1) } \\ & \text { Costinuwous } \\ & \text { response }] \end{aligned}\right.$ |  | Use input mask in response field (\$999.99) so that dollar sigis is displayed and deeimal point is inserted appropriate $\%$ | LF10 |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| PAYCHECKDALY | LF9C |  | ENTER PAY PER DAY <br> \$ | $\begin{aligned} & \begin{array}{l} (1) \\ \text { [continuous } \\ \text { response] } \end{array} \\ & \hline \end{aligned}$ |  |  | LF10 |
| MONTHPAY | LF10 |  | Now thinking about the month of (CURRENT MONTH - -1 <br>  MONTH, before taxes and before any other deductions? <br> IF NEEDED: We don't need an exact dollar amount. An approximate amount is fine. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> Enter dollar amount |  | [you] respondent is SP <br> [SP] respondent is proxy <br> [you] respondent is SP <br> he] respondent is proxy, SP is male [she] respondent is proxy, SP is female | Use input mask in response fiel fied (s9999999) so hhat dolar dilin is displayed and anmmas are comsered appropriate y. | B0X LF13 |
|  | BOX LF13 | routing |  go to LF13. <br> Otherwise, go to HO1 |  |  |  |  |
| spousework | L143 | code one | Did \{you/your/SP's\} \{husband/wife/partner\} do any work for pay in the month of \{CURRENT MONTH-1 MONTH\}? |  | [your partner] respondent is SP, LIVING WITH A PARTNER <br> your husband] respondent is SP, spouse is male <br> [your wife] respondent is SP, spouse is female <br> [you] respondent is proxy, PROXY RELATIONSHIP=SPOUSE or PARTNER <br> SP's partner] respondent is proxy, PROXY RELATIONSHIP\#SPOUSE or PARTNER, LIVING WITH A PARTNER SP's husband] respondent is proxy, PROXY RELATIONSHIP $\neq$ SPOUSE or PARTNER, spouse is male [SP's wife] respondent is proxy, PROXY RELATIONSHIP $\neq$ SPOUSE or PARTNER, spouse is female |  | $\begin{aligned} & (1) \text { L LF14 } \\ & (2)+01 \\ & (-8) \text { Ho1 } \\ & (-1) \text { Ho1 } \end{aligned}$ |
| Spousearn | L1/14 |  | n \{CURRENT MONTH -1 MONTH\}, how much altogether did \{you/your/SP's\} \{husband/wife/partner\} earn before taxes and before any other deductions? <br> F NEEDED: We don't need an exact dollar amount. An approximate amount is fine <br> IF NEEDED: We know questions like these may be difficult o answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER DOLLAR AMOUNT |  | you] respondent is proxy, IN6-ROSTREL =SPOUSE (2) or PARTNER (56) and HHFLAG = 1 <br> your husband] respondent is SP, MARISTAT = 1 , spouse is male <br> your wife] respondent is SP, MARISTAT $=1$, spouse is female <br> [your partner] respondent is SP, person in ENS enumerated as partner (ROSTREL = 56) and HHFLAG = 1 <br> [SP's husband] respondent is proxy, IN6-ROSTREL NE SPOUSE (2) or PARTNER (56), MARISTAT = 1 , spouse is male <br> [SP's wife] respondent is proxy, IN6-ROSTREL NE SPOUSE (2) or PARTNER (56), spouse is female <br> [SP's partner] respondent is proxy, IN6-ROSTREL NE SPOUSE (2) or PARTNER (56), someone in ENS ROSTREL = 56 (Partner) and HHFLAG =1 | Use input mask in response field (s999,999) so that dollar sign is displayed and commas are linserted appropriatel |  |
| LAOWNHOME | но1 | code one | Next, I'd like to ask you some questions about the \{home/apartment or condo\} at \{SP's \{ADDRESS 1, ADDRESS 2\} from PERSON ROSTER\}. <br> \{Do you/Does SP\} \{or \{SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME\}\} own the \{home/apartment or condo\} at \{SP's \{ADDRESS 1 , ADDRESS 2 \} from PERSON ROSTER\}, rent it, or is there some other arrangement? |  | [home] HAQ-Dwelling in $(1,2,4,5,91,96-8,-9)$ [apartment or condo] HAQ-Dwelling in $(3,6)$ <br> [Do you or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is SP, SP is married or living with partner [Do you or \{SP FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy relationship= SPOUSE or PARTNER [Do you] respondent is SP, SP is not married or living with a partner <br> [Does SP or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy relationship $\neq$ SPOUSE or PARTNER <br> [Does SP] respondent is proxy, SP is not married or living with a partner |  |  |


| MORTGAGE | но2 | code one | Is \{your/SP's\} \{or \{SP FIRSTNAME <br> LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME\}'s\} <br> mortgage paid off or are monthly mortgage payments stil being made? <br> IF NEEDED: Include any payments on a home equity loan or second mortgage |  | [your or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is SP, SP is married or living with partner <br> [your or \{SP FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy relationship= SPOUSE or PARTNER [your] respondent is SP, SP is not married or living with a partner <br> [SP's or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy relationship $\neq$ SPOUSE or PARTNER <br> [SP's] respondent is proxy, SP is not married or living with a partner |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| morta ${ }^{\text {age amt }}$ | ноз | quantity unit |  |  |  |  | $\begin{aligned} & (-8) \text { HesA } \\ & (-9) \text { Hosb } \end{aligned}$ |
| Mortate amt2 | нозА |  | SHOW CARD HO1 IA1 <br> Please look at this card and tell me which is closest. <br> IF NEEDED: Include any payments on a home equity loan or second mortgage. |  |  |  |  |
| Mortcagelgnth | нозв | code one | TDo vou/Does SPY Tor ISP FIRTTNAME Lastname/Spouse/partner firstname lastname\} expect to pay off the mortgage within 5 years, 10 years, or longer <br> IF NEEDED: Include any payments on a home equity loan or second mortgage. |  | [Do you or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is SP, SP is married or living with partner <br> [Do you or \{SP FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy relationship= SPOUSE or PARTNER <br> [Do you] respondent is SP, SP is not married or living with a partner <br> [Does SP or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy <br> relationship $\neq S$ SOUSE or PARTNER <br> [Does SP] respondent is proxy, SP is not married or living with a partner |  | нозс |
| Mortcageowe1 | нозс | quantity unit | About how much \{do you/does SP\} \{or \{SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME\}\} still owe on the mortgage? <br> IF NEEDED: The nearest $\$ 10,000$ is fine. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> IF NEEDED: Include any payments on a home equity loan or second mortgage. <br> ENTER DOLLAR AMOUNT |  | [do you or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is SP, SP is married or living with partner <br> [do you or \{SP FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy relationship= SPOUSE or PARTNER [do you] respondent is SP, SP is not married or living with a partner <br> [does SP or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy <br> relationship $\neq$ SPOUSE or PARTNER <br> [does SP] respondent is proxy, SP is not married or living with a partner |  | $\begin{aligned} & (1) \text { но4 } \\ & \left(\begin{array}{l} -8) \text { Но3D } \\ (-9) ~ Н о 4 ~ \end{array}\right. \end{aligned}$ |
| mortageowe2 | нозь | code one | Is the amount owed.. |  |  |  |  |


| presenvalue1 | но4 | quantity unt |  |  | [home] HAQ-Dwelling in $(1,2,4,5,91,96,-8,-9)$ [apartment or condo] HAQ-Dwelling in $(3,6)$ |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| presenvaluez | ноя4 | de one | SHOW CARD HOZ IA2 Please look at this card and tell me which is closest. |  |  |  | Aanıroı |
| patrent | 405 | Ces/no | \{Do you/Does SP\} \{or \{SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME $\}$ pa rent to live here? |  |  |  |  |
| Rentamt | H06 | quantity unt |  |  |  |  |  |
| Entamt2 | H06A | one | SHOW CARD HO3 IA3 <br> Please look at this card and tell me which is closest. |  |  |  |  |
|  | 80x $0^{1}$ | outing |  |  |  |  |  |
| sectons | ноя | ves/no |  |  |  |  | Aaminroi |


| haintroi | Aalntro1 | $\bigcirc$ entry |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| SSR_ LASTMONTH | Ha1 | code all | Did \{you/SP\} \{or \{SP FIRSTNAME LASTNAME/SPOUSE/PARTNER IRSTNAME LASTNAMEY receive Social Security retirement and/or Railroad Retirement payments in the last month, that is in CURRENT MONTH11)? <br> IF NEEDD: These checks are either automatically deposited in the bank or mailed to arrive on the 3rd of every month. If mailed, they are often sent in gold or manila-colored envelopes. <br> [select All that apply |  | [you or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is SP, SP is married or living with partner [you or \{SP FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy relationship= SPOUSE or PARTNER [you] respondent is SP, SP is not married or living with a partner <br> [SP's or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy relationship $\neq$ SPOUSE or PARTNER <br> [SP's] respondent is proxy, SP is not married or living with a partner <br> Display "SELECT ALL THAT APPLY" and response option <br> 2, "YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE if SP is married or living with a partner <br> Do no display "SELECT ALL THAT APPLY" and response option <br> 2, "YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE if SP is not married or living with a partner <br> Display "in the last month" in underlined text |  |
|  | Box IaQ1 | routing | IF IAQ1 NE (1) SP PAYMENT THEN GO TO IAQ4, ELSE GO TO IAQ22 |  |  |  |
| SSDEPSSST | HAQ2 | code one | \{Do you/Does SP\} get payments by direct deposit, on a prepaid card, or by mail? |  | [Do you] respondent is SP [Does SP] respondent is proxy | AQ3-MMSTARTSS |
| MMSTARTS | AQ 3 | quantity unit | What month and year did \{you/SP\} start receiving Social Security? ENTER MONTH |  | [you] respondent is SP [SP] respondent is proxy | AQ3-YSTARTSS |
| YYSTARTS | AQ 3 | quantity unit | What month and year did \{you/SP\} start receiving Social Security? EnTER YEAR | (1) <br> [continuous <br> response] <br> $(-8)$ DON'T <br> KNOW <br> $(-9)$ REFUSED | [you] respondent is SP SPP] respondent is proxy | $1 \mathrm{AO4}$ |
| SSI_LASTMONTH | $1 \mathrm{AQ4}$ | code all | Did \{you/SP\} \{or \{SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME\}\} receive Supplemental Security Income, which is also called SSI, last month? <br> F NEEDED: These are monthly government payments to ower-income people in need. <br> \{SELECT ALL THAT APPLY\} |  | [you or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is SP, SP is married or living with partner <br> [you or \{SP FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy relationship= SPOUSE or PARTNER [you] respondent is SP, SP is not married or living with a partner <br> [SP's or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy relationship $\neq$ SPOUSE <br> or PARTNER <br> [SP's] respondent is proxy, SP is not married or living with a partner <br> Display "SELECT ALL THAT APPLY" and response option <br> 2, "YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE if SP is married or living with a partner <br> Do no display "SELECT ALL THAT APPLY" and response option <br> 2, "YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE if SP is not married or living with a partner <br> Display "in the last month" in bold underlined text. | 1 AQ 5 |


| VA_LASTMONTH | AQ 5 | code all | Did \{you/SP\} \{or \{SP FIRSTNAME ASTNAME/SPOUSE/PARTNER FRSTNAME LASTNAME] receive any payments from the Veteran's Administration, last month related to miltary service or veteran survivor's IIF NEEDED: The Veteran's Administration is also known as the U.S. Department of Veterans Affairs.] <br> \{SELECT ALL THAT APPLY\} |  | [you or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is SP, SP is married or living with partner <br> [you or \{SP FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy relationship= SPOUSE or PARTNER [you] respondent is SP, SP is not married or living with a partner <br> [SP's or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy relationship $\neq$ SPOUSE or PARTNER <br> [SP's] respondent is proxy, SP is not married or living with a partner <br> Display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE if SP is married or living with a partner <br> Do no display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE if SP is not married or living with a partner | A0, |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| PENSION_LASTMONTH | A0.6 | code all | People sometimes have other retirement income. This jobs. <br> Do you/Does SP\} \{or \{SP FIRSTNAME _ASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME\}\} have any pension plans that were a job-related or union benefit? <br> IF NEEDED: These plans often require that a person work for a certain number of years before they qualify or "are vested" in the pension plan. <br> \{SELECT ALL THAT APPLY\} | (1) YES, SP HAS PENTION (2) YES, SPOUSEPART NER HAS PENSION (3) NO PENSIONS (-8) DON'T KNOW (-9) REFUSED | [Do you or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is SP, SP is married or living with partner <br> Do you or \{SP FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy relationship= SPOUSE or PARTNER <br> [Do you] respondent is SP, SP is not married or living with a partner <br> [Does SP or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy <br> relationship $\neq$ SPOUSE or PARTNER <br> [Does SP] respondent is proxy, SP is not married or living with a partner <br> Display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE if SP is married or living with a partner <br> Do no display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE if SP is not married or living with a partner | ${ }^{2} 7$ |
| 4011_ LASTMONTH | AQ7 | (1) | show Card ia4 <br> Please look at the types of retirement plans on this card. Do you/Does SP\} \{or \{SP FIRSTNAME -ASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME\}\} have any of these? <br> IF NEEDED: 401Ks and 403Bs are plans where you contribute an amount each month from your paycheck, and your employer may match some of your contribution <br> F NEEDED: IRAs, also known as Individual Retirement Accounts, are a type of plan you set up on your own. \{SELECT ALL THAT APPLY\} |  | [Do you or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is SP, SP is married or living with partner <br> [Do you or \{SP FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy relationship= SPOUSE or PARTNER <br> [Do you] respondent is SP, SP is not married or living with a partner <br> [Does SP or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy <br> relationship $\neq$ SPOUSE or PARTNER <br> [Does SP] respondent is proxy, SP is not married or living with a partner <br> Display "SELECT ALL THAT APPLY" and response option <br> 2, "YES, SPOUSE/PARTNER HAS 401K, 403B, IRA, OR KEOGH". if SP is married or living with a partner <br> Do no display "SELECT ALL THAT APPLY" and response option <br> 2, "YES, SPOUSE/PARTNER HAS 401K, 403B, IRA, OR KEOGH" if SP is not married or living with a partner | A |
| mUTUalfunds | (1088 | code all | \{Not including the retirement accounts we have already talked about, \{do you/does SP\}/\{Do you/Does SP\}\} \{or \{SP IRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME\}\} own any mutual funds or stocks? <br> \{SEIFCT ALI THAT APPLY\} |  |  <br> 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPC <br> 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY" if SP not married or living with a |  |


| BONDS | 1 AO 9 | code all | Not including what we've already talked about, \{do ou/does SP\} \{or \{SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME\}\} own any bonds, such as Government Savings Bonds, corporate, municipal, or other types of bonds? <br> \{SELECT ALL THAT APPLY\} | (1) YES, SP HAS ASSET (2) YS, SPOUSE/PART NER HAS ASSET (3) YYS, SP AND SPOUSE/PART NER HVE ASAET JOINTLY (4) NO ASSET OF THIS TYPE (-8) DONT KNOW (-9) REFUSED | [do you or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is SP, SP is married or living with partner <br> [do you or \{SP FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy relationship= SPOUSE or PARTNER [do you] respondent is SP, SP is not married or living with a partner <br> [does SP or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy <br> relationship $\neq S$ SOUSE or PARTNER <br> [does SP] respondent is proxy, SP is not married or living with a partner <br> Display "SELECT ALL THAT APPLY" and response option <br> 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY" if SP is married or living with a partner Do not display "SELECT ALL THAT APPLY" and response option <br> 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY" if SP is not married or living with a partner | AQ10 |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| CHECKING | AQ10 | code all | The next questions ask about different kinds of bank or savings accounts people sometimes have or property the own. <br> Not counting what we've already talked about, \{do you/does SP\} \{or \{SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME\}\} have... <br> A checking account? |  | [do you or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is SP, SP is married or living with partner <br> [do you or \{SP FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy relationship= SPOUSE or PARTNER <br> [do you] respondent is SP, SP is not married or living with a partner <br> [does SP or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy <br> relationship $\neq S$ SOUSE or PARTNER <br> [does SP] respondent is proxy, SP is not married or living with a partner <br> Display "SELECT ALL THAT APPLY" and response option <br> 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY" if SP is married or living with a partner Do not display "SELECT ALL THAT APPLY" and response option <br> 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY" if SP is not married or living with a partner | AQ11 |
| SAVINGS | AA011 | code all | [IF NEEDED: Not counting what we've already talked about, \{do you/does SP\} \{or \{SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME\}\} have...] <br> A savings account or money market account? |  | [do you or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is SP, SP is married or living with partner <br> do you or \{SP FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy relationship= SPOUSE or PARTNER do you] respondent is $\mathrm{SP}, \mathrm{SP}$ is not married or living with a partner <br> [does SP or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy relationship $\neq$ SPOUSE or PARTNER <br> [does SP] respondent is proxy, SP is not married or living with a partner <br> Display "SELECT ALL THAT APPLY" and response option <br> 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY" if SP is married or living with a partner Do not display "SELECT ALL THAT APPLY" and response option <br> 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY" if SP is not married or living with a partner | AO12 |
| CERTDEPOSIT | AA012 | code all | [IF NEEDED: Not counting what we've already talked about, \{do you/does SP\} \{or \{SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME\}\} have...] <br> Certificates of deposit? |  | [do you or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is SP, SP is married or living with partner <br> do you or \{SP FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy relationship= SPOUSE or PARTNER [do you] respondent is SP, SP is not married or living with a partner <br> [does SP or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy relationship $\neq$ SPOUSE or PARTNER <br> [does SP] respondent is proxy, SP is not married or living with a partner <br> Display "SELECT ALL THAT APPLY" and response option <br> 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY" if SP is married or living with a partner Do not display "SELECT ALL THAT APPLY" and response option <br> 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY" if SP is not married or living with a | A0.13 |
| Other_LAND | \|A013 | code all | \{Do you/Does SP\} \{or \{SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME own a business, a farm, or any other real estate \{besides \{your/SP's\} home\}, including land or rental properties? <br> \{SELECT ALL THAT APPLY\} |  | do you or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}\} respondent is SP, SP is married or living with partner <br> do you or \{SP FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy relationship= SPOUSE or PARTNER <br> [do you] respondent is SP, SP is not married or living with a partner <br> does SP or \{SPOUSE/PARTNER FIRSTNAME LASTNAME\}] respondent is proxy, SP is married or living with partner, proxy <br> elationship $\neq S P O U S E$ or PARTNER <br> [does SP] respondent is proxy, SP is not married or living with a partner <br> Display "SELECT ALL THAT APPLY" and response option <br> 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JoINTLY" if SP is married or living with a partner <br> Do not display "SELECT ALL THAT APPLY" and response option <br> 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY" if SP is not married or living with a partner <br> besides SP's home] respondent is proxy, SP owns home besides your home] respondent is SP, SP owns home | \|AQINTRO2 |


| haintroz | AQIntroz | noentry | We now have a few questions about income which are important for understand people manage financially a sow the age. |  |  |  | B0x\|A02 |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | B0x 1402 | routing |  |  |  |  |  |
| SSRR_Combinedi | AQ14 | code one | First, what was the amount of \{your/SP's\} and \{SP -IRTTNAME LASTNAME/SPoUSE/PARTNER FIRSTNAME ASTNAMEY's most recent monthly Social Security or Railroad Retirement payment (for the month of \{CURRENT MONTH - 1\}? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health |  | [your] respondent is SP or proxy who is spouse or partner <br> [SP's] respondent is proxy who is not spouse or partner <br> [SPOUSE/PARTNER FIRSTNAME LASTNAME] respondent is SP or proxy who is not spouse or partner and SP is married or living with a partner <br> [SP FIRSTNAME LASTNAME] respondent is proxy, proxy relationship= SPOUSE or PARTNER |  |  |
| SSRR_COMBINED2 | AQ.14A |  | enter combined sp and spouse/partner social SECURITY/RAILROAD RETIREMENT AMOUNT |  |  |  | $\begin{array}{\|l} (1) \text { BOX } \operatorname{lAQ3} \\ (-8) \mid A Q 14 B \\ (-9) \mid A Q 14 B \\ \hline \end{array}$ |
| SSRR_Combined 3 | AQ14B | code one | show Card IA5 <br> Please look at this card and tell me which is closest. |  |  |  | Box 14.3 |
| SSRR_SP_AMT1 | AQ15A | $\qquad$ | What was the amount of \{your/SP's\} most recent monthly Social Security or Railroad Retirement payment (for the month of \{CURRENT MONTH - 1\})? <br> IF NEEDED: We don't need an exact dollar amount <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SP SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT | (1) <br> Continuous <br> response $(-8)$ Don't <br> know <br> (-9) REFUSED | [yyur] respondent is SP [SP's] respondent is proxy |  | $\begin{aligned} & \left(\begin{array}{l} (1) \text { Box IAQ2A } \\ :(-8) \mid A Q 15 B \\ (-9) \text { AQ15B } \end{array}\right. \end{aligned}$ |
| SSRR SP AMT2 | \|AQ15B |  | show card ag <br> Please look at this card and tell me which is closest |  |  |  | Box 1402 A |
|  | Box IAQ2A | routing | If IAQ14 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ16A. otherwise, go to BOX IAQ. |  |  |  |  |


| SSRR_SPOUSE_AMT1 | AQ16A | quantity unit | What was the amount of fyour/SPOUSE/PARTNER FIRSTNAME LASTNAME'ss most recent monthly Social Security or Rair oad Retirement payment for the month of \{CURRENT MONTH - 1) \}? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect thi might have on their health. <br> Enter spouse/partner social security/Rallroad retirement amount |  | If IN6-ROSTREL = 2(Spouse) or 56(Partner), display "your". Otherwise, display "\{SPOUSE/PARTNER FIRSTNAME LASTNAME's" |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| SSRR_SPOUSE_AMT2 | AQ16B | code one | SHOW CARD IA6 <br> Please look at this card and tell me which is closest. |  |  |  | Box 1403 |
|  | BOX 1AQ3 | routing |  |  |  |  |  |
| SSRR Combinedi | 1 A017 | code one | What was the amount of \{your/SP's\} and \{SP FRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME\}'s most recent monthly SSI payment (for the month of \{CURRENT MONTH - 1\})? <br> IF NEEDED: We don't need an exact dollar amount. <br> F NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect thi might have on their health. |  | If SPPROXY = 1 (SAMPLE PERSON) or (SPPROXY = 2(PROXY) and IN6-ROSTREL in( 2,56 )), display "your". Othemise, display "SP"s" <br>  <br> Otherwise, display " "POUSE/PARTNER FIRSTNAME LASTNAME" |  |  |
| SSRR_combined 2 | AQ17A |  | Enter combined Sp and spouseppartier SSI Amount |  |  |  |  |
| SSRR COMBINED3 | \|AQ17B |  | SHOW CARD IA7 <br> Please look at this card and tell me which is closest |  |  |  | Box 1404 |


| SSI_SP AMT1 | AQ18A | quantity unit | What was the amount of \{your/SP's\} most recent monthly SSI payment (for the month of \{CURRENT MONTH - 1\})? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SP SSI AMOUNT |  | [yyur] respondent is SP [SP's] respondent is proxy | Use input <br> mask in <br> response <br> fiep <br> fien <br> (s9,999) so <br> that dollar <br> sign is <br> displayed <br> and <br> commas are <br> inserted <br> appropriate <br> y. |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| SSI_SP_AMT2 | AQ18B |  | SHOW CARD IA8 <br> Please look at this card and tell me which is closest |  |  |  | BOX 1a03A |
| S- | BOXIAQ3A | routing | If IAQ17 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SERARATELY, To to IAQ19A. Otherwise, go to BOX IAQ4. |  |  |  |  |
| SSI SPOUSE AMT3 | AQ19A | quantity unit | What was the amount of \{your/\{SPOUSE/PARTNER FIRSTNAME LASTNAME\}'s\} most recent monthly SSI payment (for the month of \{CURRENT MONTH - 1\})? <br> IF NEEDED: We don't need an exact dollar amount. <br> F NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> Enter spouse/partner ssi amount | (1) <br> [Continuous <br> response] <br> (-8) DON'T <br> KNOW <br> (-9) REFUSED | If IN6-ROSTREL = 2(Spouse) or 56(Partner), display "your" Otherwise, display "\{SPOUSE/PARTNER FIRSTNAME LASTNAME\}'s". |  | $\begin{aligned} & (1) \text { Box } 1 A Q 4 \\ & (-8) \mid A Q 19 B \\ & (-9) \mid A Q 19 B \\ & \hline \end{aligned}$ |
| SSI_ Spouse AmT4 | AQ19B | code one | SHOW CARD IA8 <br> Please look at this card and tell me which is closest. |  |  |  | Box 1 aq4 |
|  | BOX IAQ4 | routing |  |  |  |  |  |
| VAAMT_Combinedi | 14020 | code one | What was the amount of \{your/SP's\} and \{SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME\}'s most recent monthly Veteran's Administration payment (for the month of \{CURRENT MONTH - 1\})? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. |  | If SPPROXY = 1 (SAMPLE PERSON) or (SPPROXY = 2(PROXY) and IN6-ROSTREL in $(2,56)$ ), display "your" Otherwise, display "SP's". <br> If IN6-ROSTREL = 2(Spouse) or 56(Partner), display "SP FIRSTNAME LASTNAME". <br> Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME". |  |  |


| VAAMT_Combined 2 | AA20A | quantity unit | enter combined sp and spouse/parter va amount | (1) <br> [continuous <br> response] <br> $(-8) ~ D O N '$ KNOW <br> (-9) REFUSED |  |  | $\begin{aligned} & \left(\begin{array}{l} (1) \text { BOx ।AQ5 } \\ 1(-8) \text { AQ2OB } \\ (-9) \text { AQ2OOB } \end{array}\right. \end{aligned}$ |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| VA_AMT_Combined | AA20B | code one | SHOW CARD IA9 <br> Please look at this card and tell me which is closest. |  | If SPPROXY $=1$ (SAMPLE PERSON), display "your" Otherwise, display "SP's's. |  | Box 1405 |
| VA.SPPAMT1 | AQ21A | quantity unit | What was the amount of $\left\{y o u r / S P^{\prime}\right.$ 's $\}$ most recent monthly Veteran's Administration payment (for the month of \{CURRENT MONTH - 1\})? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SP VA AMOUNT | (1) <br> [continuous <br> response] <br> know <br> (-9) REFUSED | If SPPROXY $=1$ (SAMPLE PRERSON), display "your". otherwise, display "SP's". | Use input maskin response fiel fied (s9999) so that thatlar sign is displayed and aommas are inserted appropriate and | $\begin{aligned} & (1) \text { BOX IAQ4A } \\ & (-8) \mid \mathrm{AQ21a} \\ & (-9) \mid \mathrm{AQ} 21 \mathrm{~B} \\ & \hline \end{aligned}$ |
| VA. SP AMT2 | ${ }^{\text {AQ221B }}$ | code one | SHOW CARD IA10 <br> Please look at this card and tell me which is closest. |  |  |  | box lacas |
|  | Box lacas | routing |  |  |  |  |  |
| VA_ Spouse AmT1 | 1AQ22A | quantity unit | What was the amount of fyour//SPOUSE/PARTNER FIRSTNAME LASTNAMEY's\} most recent monthly Veteran's Administration payment for the month of \{CURRENT MONTH - 1)? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SPOUSE/PARTNER VA AMOUNT | $\begin{aligned} & \text { (1) } \\ & \text { [continuous } \\ & \text { response] } \\ & (-8) \text { DON'T } \\ & \text { KNOW } \\ & (-9) \text { REFUSED } \\ & \hline \end{aligned}$ | If IN6-ROSTREL = 2(Spouse) or 56(Partner), display "your" Otherwise, display "\{SPOUSE/PARTNER FIRSTNAME LASTNAME\}'s" | Use input lask int response fielo isp, (s999) so that odlar sign is displayed and and commas are inserted appropriate y. |  |


| VA Spouse amt 2 | ${ }^{\text {AQ22B }}$ | code one | SHOW CARD IA10 <br> Please look at this card and tell me which is closest |  |  |  | Box 1 Aas |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | Box ia0. | routing | If IAQ6 = 1 (SP RECEIVED PENSION PLAN) and 2 (SPOUSE RECEIVED PENSION PLAN), go to IAQ23. <br> Else if IAQ. $6=1$ (SP RECEIVED PENSION PLAN), go to IAQ24A. <br> Else if IAQ6 = 2 (SPouse recelved Pension pLAN), go to 1AQ25A. <br> Otherwise, go to BOXIAQ6 |  | If SPPROXY $=1$ (SAMPLE PERSON) or (SPPROXY $=2$ (PROXY) and ING ROSTREL in(2,56)), display "you" Otherwise, display "SP". <br> fi ING-ROSTREL $=2$ (Spouse) or 5 (Partner), display "SP FIRSTNAME LASTNAME". <br> Otherwise display " "SPOUSE/PARTTNER EIRTTNAME LASTNAME" |  |  |
| PENSIoN_Combinedi | 14023 | code one | You told me earlier that \{you/SP\} and \{SP FIRSTNAME AASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME have job-related pension plans. In all, how much was received from these pension plans in the last month, before any federal or state taxes were taken out (for the month of \{CURRENT MONTH - 1\})? <br> IF NEEDED: We don't need an exact dollar amount <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health |  |  |  |  |
| PENSION_COMBINED2 | 1A223A |  | ENTER COMBINED SP AND SPOUSE/PARTNER PENSION PLAN AMOUNT |  |  |  | $\left\{\begin{array}{l} (1) \text { BOX } 1 A Q 6 \\ (-8) \mid A Q 23 B \\ (-9) \text { IAQ23B } \\ \hline \end{array}\right.$ |
| pension combined3 | 1AQ23B | code one | show CARD IA11 <br> Please look at this card and tell me which is closest |  |  |  | Box 14.6 |
| Pension_sp Amt | IAQ24A | quantity unit | \{You told me earlier that \{you have/SP has\} a job-related pension plan. In all, how much was received from \{your/SP's\} job-related/this\} pension plan in the last month, before any federal or state taxes were taken out for the month of \{CURRENT MONTH - 1\})? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how might have on their health <br> enter sp pension plan amount | (1) Continuous resposel (Cs) NoN KON KNow (-9) REFUSED | If SPPROXY = 1(SAMPLE PERSON), display "you have" and "your". <br> Otherwise, display "SP has" and "SP's". <br> IfIA23=2, (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY", display "'your/SP's\} iob-related". <br> Otherwise, display "You told me earlier that \{you have/SP has\} a job-related pension plan." and "th |  | $\begin{aligned} & (1) \text { BOx } 1 A Q 5 A \\ & : \begin{array}{l} (-8) \mid A Q 24 B \\ (-9) \mid A Q 24 B \\ \hline \end{array} \end{aligned}$ |


| Pension_sp Amt2 | AQ24B | code one | SHOW CARD IA12 <br> Please look at this card and tell me which is closest. |  |  |  | Box Ia0.5A |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | Box 1a05A | routing | $\begin{aligned} & \text { If IAQ23 }=2 \text { (ENTER SP AND SPOUSE/PARTNER AMOUNTS } \\ & \text { SEPARATELY), go to IAQ25A. } \\ & \text { Otherwise, go to BOX IAQ. } \end{aligned}$ |  |  |  |  |
| Pension SPouse_AMT1 | AQ25A | quantity unit | IYou told me earlier that \{you have//SPOUSE/PARTNER FIRSTNAME LASTNAME\} has $\}$ a job-related pension plan.\} nall, how much was received from \{your//SPOUSE/PARTNER FIRSTNAME LASTNAME's\} job related/this\} pension plan in the last month, before any federal or state taxes were taken out for the month of (CURRENT MONTH - 1)]? <br> F NEEDED: We don't need an exact dollar amount. <br> F NEEDED: We know questions like these may be difficult o answer, but we need to know this to understand how seople manage financially as they age and what effect this might have on their health. <br> ENTER SPOUSE/PARTNER PENSION PLAN AMOUNT |  | If IN6-ROSTREL = 2(Spouse) or 56(Partner), display "you have" and "your". <br> Otherwise, display "\{SPOUSE/PARTNER FIRSTNAME LASTNAME\} has" and "\{SPOUSE/PARTNER FIRSTNAME LASTNAME\}'s". If IA23 $=2$ (ENTER SP and SPOUSE/PARTNER AMOUNTS SEPARATELY), display "\{your/SP's\} job-related". <br> Otherwise, display "You told me earlier that \{you have/\{SPOUSE/PARTNER FIRSTNAME LASTNAME\} has\} a jobrelated pension plan" and "this". | Use input mask in response fiel fied (s9999) so that thatlar sign is displyed and aommas are inserted appropriate v. |  |
| PENSION SPOUSE AMT2 | AQ25B | code one | show CARD IA12 <br> Please look at this card and tell me which is closest |  |  |  | Box IAQ6 |
|  | Box Ia0.6 | routing | f IAQ7 $=1$ (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IAQ26. <br> Else if IAQ7 = 1 (SP HAS RETIREMENT ACCT), go to IAQ27A Else if IAQ7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to AQ28A. <br> Otherwise, go to BOX IAQ9 |  |  |  |  |
| 401K Combined | 1 AQ26 |  | This next question is a bit different. You mentioned that (yyou/SP) and \{SP FIRTTNAME LASTNAME/SPOUSE/PARTNER IRSTNAME LASTNAME\} ave retirement accounts. In total, about how much is currently in all of these retirement accounts? <br> IF NEEDED: Retirement accounts include 401K, 403B, IRA, and other retirement accounts <br> F NEEDED: We don't need an exact dollar amount <br> F NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect thi might have on their health |  | If SPPROXY = 1 (SAMPLE PERSON) or (SPPROXY = 2(PROXY) and IN6-ROSTREL in $(2,56)$ ), display "you". Otherwise, display "SP" <br> If IN6-ROSTREL = 2(Spouse) or 56(Partner), display "SP FIRSTNAME LASTNAME". <br> Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME" <br> Display "currently" in underlined text. |  |  |


| 401K_ Combined 2 | AA26A | quantity unit | Enter combined sp and spouse/partner retremen ACCOUNT AMOUNT |  |  | Use input maks in response field isp,999,999 so that sollar sign is displayed and commas are inserted appropriate a |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| 401K_ combined | AQ26B | code one | SHOW CARD IA13 <br> Please look at this card and tell me which is closest. |  |  |  | Box 1AQ7 |
| 4011_SP_AMT1 | AQ27A | quantity unit | This next question is a bit different. You mentioned that \{you have/SP has\} retirement accounts. In total, about how much is currently in all of these retirement accounts? <br> IF NEEDED: Retirement accounts include 401K, 403B, IRA and other retirement accounts. <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect thi might have on their health. <br> ENTER SP RETIREMENT ACCOUNT AMOUNT | (1) <br> [continuous <br> response] <br> $\left(\begin{array}{l}\text { (-8) DON'T } \\ \text { KNOW } \\ \text { K-9) REFUSED }\end{array}\right.$ | If SPPROXY = 1(SAMPLE PERSON), display "you have". Otherwise, display "SP has" <br> Display "currently" in underlined text. |  | $\begin{aligned} & (1) \text { BOX IAQ6A } \\ & 1(-8) \mid \mathrm{AQ27B} \\ & (-9) \mid \mathrm{AQ} 27 \mathrm{~B} \\ & \hline \end{aligned}$ |
| 401K_SP_AMT2 | AQ27B | code one | show CARD A14 <br> Please look at this card and tell me which is closest |  |  |  | Box Ia06A |
|  | BOX 14.6 A | routing | If IAQQ26 = 2 ( ( NT TER SP AND SPOUSE/PARTNER AMOUNTS SEEPRATELY), go to A A288A. Otherwise, go to BOX IAQ7. |  |  |  |  |
| 401 K _SPOUSE AMT1 | IAQ28A | quantity unit | This next question is a bit different. You mentioned that iyou have//SPOUSE/PARTNER FRSTNAME LASTNAME\} has retirement accounts. In total, about onow much is currently in all of these retirement accounts? IF NEEDED: Retirement accounts include 401K, 403B, IRA and other retirement accounts. IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how peopple manage financially as they age and what effect this might have on their health. ENTER SPOUSE/PARTNER RETIREMENT ACCOUNT AMOUNT |  | If ING-ROSTREL = 2 (Spouse) or 56(Partner), display "you have" Otherwise, display "\{SPOUSE/PARTNER FRSTNAME LASTNAME\} has". Display "currently" in underlined text: |  | $\begin{aligned} & (1) \text { BOX IAQ7 } \\ & (-8) \mid A Q 28 B \\ & (-9) \mid A Q 28 B \end{aligned}$ |


| 401K SPouse_amt2 | 1AQ28B | code one | SHOW CARD IA14 <br> Please look at this card and tell me which is closest. |  |  |  | Box 1AQ7 |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | B0X \| 107 | routing | f IAQ7 $=1$ (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IAQ29. <br> Else if IAQ7 = 1 (SP HAS RETIREMENT ACCT), go to IAQ30A Else if IAQ7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to IAQ31A. <br> Otherwise, go to BOX IAQ8 |  |  |  |  |
| RECIVVE combinedi | 1 AQ29 | code one | Last month, how much altogether did \{you/SP\} and \{SP LASTNAME\} receive or withdraw from all of these retirement accounts (for the month of \{CURRENT MONTH 1) ? <br> F NEEDED: We don't need an exact dollar amount. <br> F NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health |  | If SPPROXY = 1 (SAMPLE PERSON) or (SPPROXY $=2$ (PROXY) and ING-ROSTREL in(2,56)), display "you" Otherwise, display "SP" <br> If IN6-ROSTREL = 2(Spouse) or 56(Partner), display "SP FIRSTNAME LASTNAME". <br> Otherwise, display "SPOUSE/PARTNER FRSTNAME LASTNAME" <br> Display "Last month" in bold underlined text: |  | $\begin{aligned} & (1) \mid A Q 29 A \\ & (2) \mid A Q Q 30 A \\ & -(-8) A Q Q 29 B \\ & -9) \mid A Q 29 B \end{aligned}$ |
| RECIEVE_COMBINED2 | AQ29A |  | ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMEN ACCOUNT RECEIVED/WITHDRAWN AMOUNT |  |  | Use input <br> mask in <br> response <br> field <br> (s99, 999 so so <br> that <br> that ollar <br> sign is <br> displayed <br> and <br> commas are <br> inserted <br> appropriate |  |
| RECIEVE COMbINED3 | 1029B | code one | SHOW CARD IA15 <br> Please look at this card and tell me which is closest. |  | Display "last month" in underlined text. |  | Box 14.8 |
| RECEVE.SP1 | IAQ30A | quantity unit | Last month, how much altogether did \{you/SP\} receive or ement accounts (for th month of \{CURRENT MONTH - 1\})? <br> IF NEEDED: We don't need an exact dollar amount <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SP RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT |  | If SPPROXY = 1 (SAMPLE PERSON), display "you" and "your". Otherwise, display "SP" and "\{his/her\}". <br> Display "last month" in underlined text. |  |  |


| RECEVE_SP2 | $1 \mathrm{AQ30B}$ | code one | SHOW CARD IA16 <br> Please look at this card and tell me which is closest |  | Display "last month" in underlined text. |  | Box IaQ7A |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | Box IaQ7A | routing | If IAQQ29 = 2 ( ( NTTER SP AND SPOUSE/PARTNER AMOUNTS SEEPRATELY, Otherwise, go to to BOX IAB1A. |  |  |  |  |
| RECEIVE_SPouse1 | AQ31A | quantity unit | Last month, how much altogether did UVOU SSSOUSEP PARTNER FIRTTNAME LASTNAMEY receive or withdraw from \{your/his/her) fetirement accounts (for the month of (CURRENT MONTH - 1)? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> enter spouse/partner retirement account received/withdrawn amount |  | If IN6-ROSTREL $=2$ (Spouse) or 56(Partner), display "you" and "your" Otherwise, display "\{SPOUSE/PARTNER FIRSTNAME LASTNAME\}" and "\{his/her\} Display "Last month" in underlined text. | Use input <br> mask in <br> respone <br> fied <br> fied <br> Ss9,999) so <br> that tollar <br> sign n <br> sis is <br> dislayed <br> and <br> commas are <br> insered <br> appropriatel <br> y. | $\left\lvert\, \begin{aligned} & (1) \text { BOX IAQ8 } \\ & (-8) \mid A Q 31 B \\ & (-9) \mid A Q 31 B \end{aligned}\right.$ |
| RECEIVE_SPOUSE2 | AQ31B | code one | SHOW CARD IA16 <br> Please look at this card and tell me which is closest |  | Display "last month" in underlined text. |  | Box IAQ 8 |
|  | Box Ia08 | routing | f IAQ7 = 1 (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IAQ32. <br> Else if IAQ7 = 1 (SP HAS RETIREMENT ACCT), go to IAQ33A Else if IAQ7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to IAQ34A. <br> Otherwise, go to BOXIAQ9. |  |  |  |  |
| YRRECIEVE_COMBINED1 | 1AQ32 |  | Now thinking about all of last year, that is calendar year \{CURRENT YEAR - 1\}, how much altogether did \{you/SP\} and \{SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME\} receive or withdraw from all of these retirement accounts? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this their health. |  | If SPPROXY = 1 (SAMPLE PERSON) or (SPPROXY = 2(PROXY) and IN6-ROSTREL in $(2,56)$ ), display "you". Otherwise, display "SP" <br> If IN6-ROSTREL = 2(Spouse) or 56(Partner), display "SP FIRSTNAME LASTNAME" <br> Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME" <br> Display "last year" in underlined text. |  |  |
|  | IAQ32A |  | ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMEN ACCOUNT RECEIVED/WITHDRAWN AMOUNT | (1) (1) Continuous responsel $(-8)$ DoNT KNOW $(-9)$ REFUSED |  |  |  |


| YrRECIIVE_COMBINED3 | ${ }^{\text {A032B }}$ | code one | SHOW CARD IA17 <br> Please look at this card and tell me which is closest. |  | isplay "last year" in underlined text. |  | Box 1409 |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| YRRECEIVE.SP1 | AQ33A | quantity unit | Now thinking about all of last year, that is calendar year CURRENT YEAR - 1\}, how much altogether did \{you/SP\} receive or withdraw from all of \{your/his/her\} retirement plans? <br> F NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health <br> ENTER SP RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT |  | If SPPROXY = 1 (SAMPLE PERSON), display "you" and "your" Otherwise, display "SP" and "\{his/her\}". <br> Display "last year" in underlined text. |  |  |
| YRRECEIVE_SP2 | AQ33B | code one | show CARD A18 <br> For last year, that is calendar year (CURRENT YEAR - 1), |  | Display "last year" in underlined text. |  | Box Ia 8 A |
|  | Box IAQ8A | routing | If IAQ32 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS <br> SEPARATELY), go to IAQ34A <br> Otherwise, go to BOX IAQ9 |  |  |  |  |
| YRRECEVE Spouse 1 | AQ34A | quantity unit | Now thinking about all of last year, that is calendar year CURRENT YEAR - 1\}, how much altogether did \{you/\{SPOUSE/PARTNER FIRSTNAME LASTNAME\}\} receive or withdraw from all of \{your/his/her\} retirement plans? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SPOUSE/PARTNER RETIREMENT ACCOUNT received/withdrawn amount | (1) (Continuous response] (-8) DONTT KNOW (-9) REEUSED | If IN6-ROSTREL = 2(Spouse) or 56(Partner), display "you" and "your". Otherwise, display "\{SPOUSE/PARTNER FIRSTNAME LASTNAME\}" and "\{his/her\}" Display "last year" in underlined text. |  | $\begin{aligned} & (1) \text { Box } 1 А Q 9 \\ & (-8) \mid \angle Q 34 B \\ & (-9) \mid A Q 34 B \end{aligned}$ |
| Yerecelve spousez | IAQ34B |  | SHOW CARD HA15 IA18 <br> Please look at this card and tell me which is closest |  | Display "last year" in underlined text. |  | Box 1a99 |


|  | B0x 1a99 | routing |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| OTHER_COMBINED 1 | 1 A035 | code one | You told me earlier that \{you/SP\} and \{SP FRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME\} own \{mutual funds or stocks\} \{government, Corporate, or other bondss that are not part of retirement accounts. About how much are these worth? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how oeople manage financially as they age and what effect this might have on their health. might have on their health. |  | If SPPROXY $=1$ (SAMPLE PERSON) or (SPPROXY $=2$ (PROXY) and IN6-ROSTREL in(2,56)), display "you" Otherwise, display "SP". <br> If IN6-ROSTREL = 2(Spouse) or 56(Partner), display "SP FIRSTNAME LASTNAME". <br> Otherwise, display "SPOUSE/PARTNER FRSTNAME LASTNAME" <br> If 1 A8 $=1$ (SP MUTUAL FUNDS) or 2 (SPOUSE MUTUAL FUNDS) or 3 (JOINT MUTUAL FUNDS), display "mutual funds or stocks". <br> If IA9 $=1$ (SP BONDS) or 2 (SPOUSE BONDS) or 3 (JOINT BONDSS), display "government, corporate, or other bonds" <br> If more than one type of asset displayed, display "and" between them. |  |  |
| OTHER_COMBIIED2 | 1AQ35A | quantity unit | enter combined sp and spouse's/Partner's mutual FUNDS/STOCKS/BONDS AMOUNT |  |  |  | $\begin{aligned} & (1) \text { Box IAQ10 } \\ & (-8) \text { Box IAQQA } \\ & (-9) \text { Box IAQQ9A } \end{aligned}$ |
| OTHER_COMBINED3 | AQ35B | code one | SHOW CARD HA16 IA19 <br> Please look at this card and tell me which is closest |  |  |  | box laq10 |
|  | B0x 1a99a | routing | f [IAQ8 $=1$ (SP MUTUAL FUNDS) and IAQ8 $=2$ (SPOUSE VUTUAL FUNDS)] or IAQ8= 3 (JOINT MUTUAL FUNDS), go to IAQ35B. <br> Otherwise, go to IAO35C |  |  |  |  |
| OTHER_COMBINED4 | ${ }^{\text {AQa35C }}$ | code one | SHOW CARD HA17 IA20 <br> Please look at this card and tell me which is closest |  |  |  | Box IaQ10 |
| OTHER.SP1 | IAQ36A | quantity unit | You told me earlier that \{you own/SP owns\} \{mutual funds or stocks\} \{government, corporate, or other bonds\} that are not part of retirement accounts. About how much are these worth? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult o answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> Enter sp mutual funds/stocks/bonds amount | $\begin{array}{\|l\|} \hline(1) \\ \text { [continuous } \\ \text { [Cesponse] } \\ \text { (-8) DoN'T } \\ \text { KNOW } \\ (-9) \text { REFUSED } \\ \hline \end{array}$ | If SPPROXY = 1 (SAMPLE PERSON), display "you own". Otherwise, display ""SP owns". If $I A 8=1$ (SP MUTUAL FUNDS), display "mutual funds or stocks". II IA = 1 (SP BoNDSS), display "goverment, corporate, or other bonds". If more than one type of asset displayed, display "and" between them. |  | (1) box Iaq9C (-8) BOX IAQ9B (-9) BOX IAQ. |
|  | Bох 1а99 | routing |  |  |  |  |  |


| OTHER.SP2 | 1A036B | code one | SHOW CARD lA18 IA21 <br> Please look at this card and tell me which is closest |  |  |  | Box 1a09\% |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| OTHER.SP3 | AQ36C | code one | SHOW CARD łA19 IA22 <br> Please look at this card and tell me which is closest |  |  |  | Box 1a090 |
|  | Box lapac | routing | If IAQ8 = 2 (SPOUSE MUTUAL FUNDS) or IAQ9 = 2 (SPOUS <br> BONDS), go to IAQ37A <br> Otherwise, go to BOX IAQ10. |  |  |  |  |
| OTHER_Spouse1 | AQ37A | quantity unit | You told me earlier that \{you own//\{SPOUSE/PARTNER FIRSTNAME LASTNAME\} owns\} \{mutual funds or stocks\} $\{$ government, corporate, or other bonds\} that are not part of retirement accounts. About how much are these <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how might have on their health. <br> Enter spouse's/PARTNer's mutual |  | If IN6-ROSTREL = 2(Spouse) or 56(Partner), display "you own". <br> Otherwise, display "\{SPOUSE/PARTNER FIRSTNAME LASTNAME\} owns". <br> If IA8 $=2$ (SPOUSE MUTUAL FUNDS), display "mutual funds or stocks". <br> If IA9 = 2 (SPOUSE BONDS), display "government, corporate, or other bonds". <br> If more than one type of asset displayed, display "and" between each one. |  | $\begin{array}{\|l\|l} (1) \text { Box IAQ10 } \\ (-8) \text { BOX IAQ9D } \\ (-9) \text { BOX IAQ.9D } \\ \hline \end{array}$ |
|  | Box 1a090 | routing | Otherwise, go to A378. |  |  |  |  |
| OTHER_Spouse2 | 1AQ37B | code one | SHOW CARD tA18 IA21 <br> Please look at this card and tell me which is closest. |  |  |  | box laq10 |
| OTHER.Spouse3 | IAQ37C | (code one | SHOW CARD tA19 IA22 <br> Please look at this card and tell me which is closest. |  |  |  | box laq10 |


|  | Box\|AQ10 | routing | f [IAQ10 = 1 (SP CHECKING) and IAQ10 = 2 (SPOUSE HECKING)] or IAQ10 $=3$ (JOINT CHECKING) or [IAQ11 $=1$ $=3$ (JOINT SAVINGS), or <br> IAQ12 $=1(\mathrm{SP}$ CDS) and IAQ12 $=2($ SPOUSE CDS $)$ ] or IAQ12 <br> = 3 (JOINT CDS), go to IAQ38. <br> Else if IAQ10 = 1 (SP CHECKING) or IAQ11 = $1($ SP SAVINGS $)$ <br> or IAQ13 = 1 (SP CDS), go to IAQ39A <br> Else if IAQ10 $=2$ (SPOUSE CHECKING) or IAQ11 $=2$ (SPOUSE SAVINGS) or IAQ13 = 2 (SPOUSE CDS), go to AQ40A <br> Otherwise, go to BOX IAQ11. |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| ACCTS_Combinedi | 1 A038 | code one | You told me earlier that \{you/SP\} and \{SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME\} accounts\} \{certificates of deposit or CDS\}. <br> If you added up all of these accounts, about how much were they worth early last month (meaning in the beginning of \{CURRENT MONTH - 1\}\}? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect thi might have on their health. | (1) ENTER <br> COMBINED <br> AMOUTT <br> (2) ENTER SP <br> AND <br> SNOUSE/PART <br> NER <br> NEUNTS <br> AMOUTS <br> SEPARATELY <br> (-8) DON'T <br> KNOW <br> (-9) REFUSED | If SPPROXY = 1 (SAMPLE PERSON) or (SPPROXY = 2(PROXY) and IN6-ROSTREL in $(2,56)$ ), display "you". <br> Otherwise, display "SP". <br> If IN6-ROSTREL = 2 (Spouse) or 56(Partner), display "SP FIRSTNAME LASTNAME". <br> Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME" <br> If IA10a $=1($ SP CHECKING ) or IA10a $=2($ SPOUSE CHECKING) or IA10a $=3$ (JOINT CHECKING), display "checking <br> accounts" <br> If IA10b = 1 (SP SAVINGS) or IA10b $=2$ (SPOUSE SAVINGS) or IA10b $=3$ (JOINT SAVINGS), display "savings or money market accounts" <br> If IA10c = 1 (SP CDS) or IA10c $=2$ (SPOUSE CDS) or IA10c $=3$ (JOINT CDS), display "certificates of deposit or CDs". <br> If more than one type of account displayed, display "and" between each one. <br> Display "last month" in underlined text. |  |  |
| ACCTS_Combined 2 | IAQ38A |  | Enter combined sp and spouse's/Partner's ACCOUNTS TOTAL AMOUNT | (1) <br> [continuous <br> response] <br> (-8) DON'T <br> (-9) REFUSED |  | Use input mesk in response fied (\$s,999,999 sothat dolar sign is displayed dind and commas re inserter approprate |  |
|  | Box IAQ10A | routing | \|f 1 AQ12 $=$ [ 1 (SP CDS) and 2 (SPOUSE CDs)] or 3 (JOINT (CDs), go to IAQ38B. Otherwise, go to IAOB8C. |  |  |  |  |
| ACCTS_SEPARATE1 | 1AQ38B | code one | show CARD + A2O IA23 <br> Please look at this card and tell me which is closest |  |  |  | BOX IAQ11 |
| ACCTS _Sparate 2 | 1AQ38C | code one | show CARD 1221 IA24 <br> Please look at this card and tell me which is closest. |  |  |  | Box la@al |


| ACCTS S SP1 | AQ39A | quantity unit |  |  | If SPPROXY = 1 (SAMPLE PERSON), display "you have". <br> Otherwise, display "SP has" <br> If IA10a = 1 (SP CHECKING), display "a checking account" <br> If IA10b = 1 (SP SAVINGS), display "a savings or money market account". <br> If IA10c = 1 (SP CDS), display "certificates of deposit or CDs". <br> If more than one type of account displayed, display "and" between each one. <br> Display "last month" in underlined text. |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | B0X 19010 B | routing |  |  |  |  |  |
| ACCTS _SP2 | ААЗ39 | code one | sHow CARD 1422 I 1225 <br> Please look at this card and tell me which is closest |  |  |  | Box IAQ10C |
| ACCTS_SP3 | AQ39C | code one | SHOW CARD H223 1A26 <br> Please look at this card and tell me which is closest |  |  |  | BOX IAQ10C |
|  | BOX 1 AO10C | routing |  |  |  |  |  |
| ACCTS Spouse1 | AQ40A | quantity unit | You told me earlier that iyou have//SPOUSE/PARTNER FIRSTNAME LASTNAME\} has \{ \{ checking account\} \{a savings or money market account $\{$ \{certificates of deposit or CDss. <br> If you added up all of these accounts, about how much were they worth early last month (meaning in the beginning of \{CURRENT MONTH - 1\}\}? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult o answer, but we need to know this to understand how beople manage financially as they age and what effect this might have on their health. <br> Enter spouse/partner accounts total amount |  | If IN6-ROSTREL = 2(Spouse) or 56(Partner), display "you have". <br> Otherwise, display "\{SPOUSE/PARTNER FIRSTNAME LASTNAME\} has". <br> If IA10a = 2 (SPOUSE CHECKING), display "a checking account" <br> If IA10b = 2 (SPOUSE SAVINGS), display "a savings or money market account", <br> If IA10c = 2 (SPOUSE CDS), display "certificates of deposit or CDs". <br> If more than one type of account displayed, display "and" between each one. Display "last month" in underlined text. |  | (1) BOX 1 AQQ11 $(-8)$ BOX IAQ10D $(-9)$ BOX $1 A Q 10 D$ |
|  | B0x 140100 | routing |  |  |  |  |  |


| ACCTS SPPuse2 | AQ40B | code one | SHOW CARD HA22 IA25 <br> Please look at this card and tell me which is closest. |  |  |  | Box la0.11 |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| ACCTS Spouse | AQ40C | code one | SHOW CARD + A23 1 IA26 <br> Please look at this card and tell me which is closest |  |  |  | Box la@ 11 |
|  | BOXIAQ11 | routing | If [IAQ8 $=1$ (SP MUTUAL FUNDS) and IAQ $8=2$ (SPOUSE MUTUAL FUNDSS) or $\mid A Q 8=3$ ( \|OINT MUTUAL FUNDS) or [IAQ9 = 1 (SP BONDS) and IAQ9 $=2$ (SPOUSE BONDS)] or IAQ9 $=3$ (JOINT BONDS), or <br> IAQ $10=1$ (SP CHECKING) and IAQ10 $=2$ (SPOUSE CHECKING) ] or $1 A Q 10=3$ (JOINT CHECKING) or SAVINGS)] or IAQ11 = 3 (JOINT SAVIIGSS), or [IAQ12 $=1$ (SP CDS) and IAQ12 $=2$ (SPOUSE CDS)] or IAQ12 $=3$ (JOINT CDS), go to IAQ41. Else if $\mid$ AQ8 $=1$ (SP MUTUAL FUNDS) or IAQ9 $=1$ (SP BONDS) or $\mid A Q 10=1$ (SP CHECKING) or IAQ.11 $=1$ (SP SAVINGS) or $\mid A Q 12=1$ (SP CDS), go to IAQ42A. Else if 1 AQ $8=2$ (SPOUSE MUTUAL FUNDS) or IAQ9 $=2$ (SPOUSE BONDS) or IAQ10 $=2$ (SPOUSE CHECKING) or AQ11 $=2($ SPOUSE SAVIINGS) or $1 A Q 12=2($ SPOUSE CDS) $)$, Otherwise, go to BOX IAO12 |  |  |  |  |
| INTRESTT_COMBINED1 | AQ41 | code | Now thinking about all of last year, that is calendar year CUURRENT YEAR - 1\}, how much interest and dividend ncome did \{you/SP\} and \{SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME\} have altogether from \{mutual funds or stocks\} \{government, corporate, or other bonds\} \{bank accounts or CDs\}? <br> IF NEEDED: We don't need an exact dollar amount. <br> F NEEDED: We know questions like these may be difficult o answer, but we need to know this to understand how people manage financially as they age and what effect th might have on their health. | (1) ENTER COMBINED AAOUNT (2) ENTER SP AND SPDUSE/PART NER AMOUNTS SEPARATELY (-8) DONTT KNOW (-9) REFUSED | If SPPROXY = 1 (SAMPLE PERSON) or (SPPROXY = 2(PROXY) and IN6-ROSTREL in $(2,56)$ ), display "you". <br> Otherwise, display "SP". <br> If IN6-ROSTREL = 2(Spouse) or 56(Partner), display "SP FIRSTNAME LASTNAME". <br> Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME" <br> If IA8 = 1 (SP MUTUAL FUNDS) or 2 (SPOUSE MUTUAL FUNDS) or 3 (JOINT MUTUAL FUNDS), display "mutual funds or stocks" <br> If IA9 = 1 (SP BONDS) or 2 (SPOUSE BONDS) or 3 (JOINT BONDS), display "government, corporate, or other bonds" <br> If [IA10a $=1$ (SP CHECKING) or 2 (SPOUSE CHECKING) or 3 (JOINT CHECKING)] or [IA10b = 1 (SP SAVINGS) or 2 (SPOUSE SAVINGS) or 3 (JOINT SAVINGS)] or [IA10c = 1 (SP CDS) or 2 (SPOUSE CDS) or 3 (JOINT CDS)], display "bank accounts or CDs" <br> If more than one type of asset displayed, display "and" between each one. <br> Display "In the last year" in underlined text. |  | $\begin{aligned} & (1) \mid A Q 41 A \\ & (2) \text { IAQ42A } \\ & (-8) \mid A Q 41 B \\ & (-9) \mid A Q 41 B \end{aligned}$ |
| Interest combined | AQ41A |  | Enter sp and spouse's/Partner's interest and Dividend income amunt |  |  |  | $(1)$ Box IAQ12 $(-8)$ BOX IAQ11A $(-9)$ BOX IAQ11A |


| Interest_combined | AQ41B | code one | SHOW CARD HA24 IA27 <br> Please look at this card and tell me which is closest |  |  |  | BOX 1a0.12 |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| INTEREST_SP1 | AQ42A |  | Now thinking about all of last year, that is calendar year CURRENT YEAR - 1\}, how much interest and dividend ncome did $\{y o u / S P\}$ have altogether from \{mutual funds or stocks\} \{bonds\} \{bank accounts or CDs\}? <br> F NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult o answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> enter sp interest and dividend income amount |  | If SPPROXY = 1 (SAMPLE PERSON), display "you" <br> Otherwise, display "SP". <br> If IA8 = 1 (SP MUTUAL FUNDS), display "mutual funds or stocks". <br> If IA9 = 1 (SP BONDS), display "bonds". <br> If IA10a = 1 (SP CHECKING) or IA10b = 1 (SP SAVINGS) or IA10c = 1 (SP CDS), display "bank accounts or CDs". <br> If more than one type of asset displayed, display "and" between each one. <br> Display "In the last year" in underlined text. | Use input mesk in response fied (Ss,999) Iso that sisn ilar isisplayed displ and commas are inserted appropratate | $\begin{aligned} & (1) \text { Box IAQ11AA } \\ & (-8) \mid A Q 42 B \\ & (-9) \mid A Q 42 B \end{aligned}$ |
| INTEREST_SP2 | AQ42B | code one | SHOW CARD H225 A28 <br> Please look at this card and tell me which is closest |  |  |  | Box 14011 A |
|  | Box\|AQ11A | routing | If 1 AO8 $8=2$ (SPOUSE MUTUAL FUNDS) or IAQ9 $=2$ (SPOUSE BONDS) or IAQ10 $=2$ (SPOUSE CHECKING) or IAQ11 = 2 (SPOUSE SAVINGS) or IAQ12 $=2$ (SPOUSE CDS), go to AQ43A. <br> Otherwise, go to BOX IAQ.12. |  |  |  |  |
| INTEREST_SPOUSE1 | 1AQ43A |  | Now thinking about all of last year, that is calendar year CURREN YEAR - 1\}, how much interest and dividend ncome did \{you/\{SPOUSE/PARTNER FIRSTNAME ASTNAME\}\} have altogether from \{mutual funds or stocks\} \{bonds\} \{bank accounts or CDs\}? <br> F NEEDED: We don't need an exact dollar amount <br> F NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health <br> ENTER SPOUSE/PARTNER INTEREST AND DIVIDEND NCOME AMOUNT ncome amount |  | If IN6-ROSTREL = 2(Spouse) or 56(Partner), display "you". Otherwise, display "\{SPOUSE/PARTNER FIRSTNAME LASTNAME\}". If IA8 = 2 (SPOUSE MUTUAL FUNDS,) display "mutual funds or stocks". If IA9 = 2 (SPOUSE BONDS), display "bonds". <br> If IA10a $=2$ (SPOUSE CHECKING) or IA10b $=2$ (SPOUSE SAVINGS) or IA10c $=2$ (SPOUSE CDS), display "bank accounts or CDs" <br> If more than one type of asset displayed, display "and" between each one. Display "In the last year" in bold underlined text. | Use input mesk in response fied isp,999 so that thilar sis displayed dislay and commas are inserted approprate |  |
| Interest_spouse2 | \|АQ43B |  | SHOW CARD HA25 IA28 <br> Please look at this card and tell me which is closest |  |  |  | Box 1a012 |


|  | B0X \|A012 | routing | If [IAQ.13 $=1$ (SP BUSINESS//FARM/REAL ESTATE) and IAQ.13 $=2$ (SPOUSE BUSINESS/FARM/REAL ESTATE)] or IAQ13 $=3$ (Joint business/FARM/REAL ESTATE), go to IAQ44. Else if IAQ13 $=1$ (SP BUSINESS//FARM/REAL ESTATE), go to IAQ45A. <br> Ise if 1 AQ13 $=2$ (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IAQ46A. <br> Otherwise, go to BOX IAQ13 |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| LAND_Combinedi | 1AQ44 | code one | You told me earlier that \{you/SP\} and \{SP FIRSTNAME ASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME\} have a business, a farm, or real estate \{other than \{SY\}'s home\}. If that were sold today and any debts on it were paid off, about how much would it bring? <br> F NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult o answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. |  |  |  |  |
|  | AQ4AA | quantity unit | ENTER SP AND SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE COMBINED AMOUNT | (1) <br> (1) <br> [continuous <br> response] <br> (-8) DONT <br> KNOW <br> K-9) <br> $(-9 E F U S E D$ |  |  |  |
| LAND_Combined 3 | 1AQ4A | code one | SHOW CARD lA26 IA29 <br> Please look at this card and tell me which is closest. |  |  |  | Box 1A0.13 |
| LAND.sp1 | IAQ45A |  | You told me earlier that \{you have/SP has\} a business, a farm, or real estate $\{0$ ther than $\{S P\}$ 's home\}. If that were sold today and any debts on it were paid off, about how much would it bring? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SP BUSINESS/FARM/REAL ESTATE AMOUNT |  | If SPPROXY = 1(SAMPLE PERSON), display "you have". Otherwise, display "SP has". <br> If HP1 = 1 (OWNS HOME), display "other than $\{$ SP\}'s home" |  |  <br> (-9) IAQ45B |
| LAND.SP2 | AQ45B | code one | SHOW CARD HA27 IA30 <br> Please look at this card and tell me which is closest |  |  |  | Box IAQ12A |
|  | B0x 14012 A | routing | If IAQ13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IAQ46A. <br> Otherwise, go to BOX IAQ13. |  |  |  |  |


| LAND SPOUSE1 | \|AQ46A | quantity unit |  |  | If ING-ROSTREL = 2(Spouse) or 56(Partner), display "you have" Otherwise, display "\{SPOUSE/PARTNER FIRSTNAME LASTNAME\} has". If HP1 = 1 (OWNS HOME), display "other than \{SP\}'s home" |  | $\begin{aligned} & (1) \text { BOX IAQ.13 } \\ & (-8) \mid \mathrm{AQ46B} \\ & (-9) \text { AQ4.46B } \end{aligned}$ |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| LAND_SPOUSE2 | IAQ46B | code one | SHOW CARD HA27 IA30 <br> Please look at this card and tell me which is closest |  |  |  | Box 1a0.13 |
|  | BOx 1a0.13 | routing | f [IAQ13 = 1 (SP BUSINESS/FARM/REAL ESTATE) and IAQ13 <br> $=2$ (SPOUSE BUSINESS/FARM/REAL ESTATE)] or IAQ13 <br> $=3$ (JOINT BUSINESS/FARM/REAL ESTATE), go to IAQ47. Else if IAQ13 = 1 (SP BUSINESS/FARM/REAL ESTATE), go to IAQ48A. <br> Else if IAQ13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IAQ49A Otherwise, go to IAQ50. |  |  |  |  |
| ncome_combined | 1 A047 | code one | Now thinking about all of last year, that is calendar year CCURRENT YEAR - 1\}, how much income did \{you/SP\} and \{SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME\} receive from these businesses or property before any federal or state taxes were taken out? F NEEDED: We don't need an exact dollar amount F NEEDED: We know questions like these may be difficult o answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. |  | If SPPROXY = 1 (SAMPLE PERSON) or (SPPROXY = 2(PROXY) and IN6-ROSTREL in $(2,56)$ ), display "you". Otherwise, display "SP". <br> If IN6-ROSTREL = 2(Spouse) or 56(Partner), display "SP FIRSTNAME LASTNAME" <br> Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME". <br> Display "In the last year" in underlined text. |  |  |
| InCOME_COMBINED2 | AQ47A |  | ENTER SP AND SPOUSE/PARTNER FROM BUSINESS/FARM/REAL ESTATE COMBINED AMOUNT |  |  |  | $\left\{\begin{array}{l} (1) \mid A Q .50 \\ (-8) \mid A Q 47 B \\ (-9) \mid A Q 47 B \end{array}\right.$ |
| Income_combined 3 | \|AQ47B |  | SHOW CARD lA28 IA31 <br> Please look at this card and tell me which is closest. |  |  |  | 1 A050 |


| INCOME.SP1 | IAQ48A | quantity unit | Now thinking about all of last year, that is calendar year CURRENT YEAR - 1\}, how much income did \{you/SP\} eceive from these businesses or property before any federal or state taxes were taken out? <br> F NEEDED: We don't need an exact dollar amount. <br> F NEEDED: We know questions like these may be difficult o answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SP BUSINESS/FARM/REAL ESTATE AMOUNT |  | If SPPROXY = 1 (SAMPLE PERSON), display "you". Otherwise, display "SP" <br> Display "In the last year" in underlined text | Use input <br> mask in <br> response <br> field <br> fien <br> (\$99,999,99 <br> 9s that <br> dollar sign is <br> dis <br> displayed <br> and <br> commas are <br> inserted <br> appropriate <br> y. | $\begin{aligned} & (1) \text { Box } 1 A Q 13 A \\ & (-8) \mid \angle Q 48 B \\ & (-9) \mid A Q 48 B \\ & \hline \end{aligned}$ |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| INCOME_SP2 | AQ48B | code one | SHOW CARD tA29 IA32 <br> Please look at this card and tell me which is closest. |  |  |  | $\underbrace{}$ |
|  | BOX 14013 A | routing | If IAQ3 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IAQ49A. <br> Otherwise, go to IAQ50. |  |  |  |  |
| Income_spousel | AQ49A | quantity unit | Now thinking about all of last year, that is calendar year \{CURRENT YEAR - 1\}, how much income did you/\{SPOUSE/PARTNER FIRSTNAME LASTNAME\}\} receive from these businesses or property before any federal or state taxes were taken out? <br> F NEEDED: We don't need an exact dollar amount. <br> F NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> Enter spouse/partner business/farm/REAL ESTATE AMOUNT | (1) [continuous response] (-8) DON'T KNOW (-9) REFUSED | If IN6-ROSTREL $=2$ (Spouse) or 56(Partner), display "you". Otherwise, display "\{SPOUSE/PARTNER FIRSTNAME LASTNAME\}" Display "in the last year" in underlined text |  | $\left\{\begin{array}{l} (1) \mid A Q 50 \\ (-8) \mid A Q 49 B \\ (-9) \mid A Q 4 Q 9 \end{array}\right.$ |
| Income_spouse2 | 1AQ49B | code one | SHOW CARD HA29 IA32 <br> Please look at this card and tell me which is closest |  |  |  | 1 A050 |


| Total_combined 1 | A0.50 | quantity unit | Now I want to ask about \{your/SP's\} \{and SP FIRSTNAME ASTNAME/SPOUSE/PARTNER FRRTNAME LASTNAMEY'S. total income for last year, that is, for the calendar year ending in December \{CURRENT YEAR - 1$\}$ before any federal or state taxes were taken out. <br> Now think about that total income from <br> Social Security or Railroad Retirement\} \{Supplemental Security Income\} \{the Veteran's Administration\} \{a pension pian\} \{any retirement accounts\} \{mutual funds or stocks\} (bonds) <br> \{bank accounts\} \{CDs\} \{business, farm or real estate\} \{jobs and from any other sources. <br> How much was \{your/SP's\} \{and SP FIRSTNAME ASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME's\} otal income before taxes for last year (this is, for the 12 months ending in December \{CURRENT YEAR - 1\}\}? <br> F NEEDED: We don't need an exact dollar amount - the nearest $\$ 1,000$ is fine. <br> ENEEDED: We know questions like these may be difficult - answer, but we need to know this to understand how eoople manage financially as they age and what effect thi night have on their health. <br> ENTER TOTAL INCOME FOR LAST YEAR |  | [SP's] respondent is proxy and proxy relatonship $\neq$ SPOUSE or PARTNER <br> [and \{SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRTNAME LASTNAME\}'s] SP is married or living with a partner otherwise do not display <br> [SP FIRSTNAME LASTNAME] respondent is proxy and proxy relationship=SPOUSE or PARTNER [SPOUSE/PARTNER FIRSTNAME LASTNAME] respondent is SP or respondent is proxy and proxy relationship $\neq$ SPOUSE or PARTNER <br> [Social Security or Railroad Retirement] IAQ1=1 or 2 <br> otherwise do not display <br> [Supplemental Security Income] $\mid A Q 4=1$ or 2 <br> otherwise do not display <br> [the Veteran's Administration] $\mid A Q 5=1$ or 2 <br> otherwise do not display <br> [a pension plan] \|AQ6=1 or 2 <br> otherwise do not display <br> [any retirement accounts] IAQ7=1 or 2 <br> otherwise do not display <br> [mutual funds or stocks] IAQ8=1, 2 or 3 <br> otherwise do not display <br> [bonds] IAQ9=1, 2, or 3 <br> otherwise do not display |  | (1) CO <br> 左 Box IAQ14 <br> (-9) BOX IAQ.1 |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | BOX IAQ14 | routing | If SPMARSTA = 1 (MARRIED) go to IAQ51A. otherwise, go to A051B. |  |  |  |  |
| TOTAL_COMBINED2 | ${ }^{\text {AQ 51A }}$ | ode one | SHOW CARD tA30 IA33 <br> Please look at this card and tell me which is closest. |  |  |  |  |
| OTAL_SP1 | IAQ51B | code one | SHOW CARD tA31 IA34 <br> Please look at this card and tell me which is closest |  |  |  |  |
| Owncar | co1 | yes/no | Now, I would like to change topics and talk about automobiles \{you own/SP owns\} \{or \{your/his/her\} \{husband/wife/partner owns\}\}. <br> \{Do you/Does SP\} \{or \{your/his/her\} \{husband/wife/partner\}\} own any cars, trucks, or vans? <br> IF NEEDED: Do not include recreational vehicles, such as motorcycles, trailers, motor homes, boats, or airplanes. |  | [you own] if SPPROXY $=1$ or (SPPROXY $=2$ and IN6-ROSTREL in $(2,56)$ ) <br> [SP owns] if SPPROXY $=2$ and IN6-ROSTREL not in $(2,56)$ <br> [or your husband] (if SPPROXY = 1 and IN13-SPMARSTA=1 (married) and spouse gender is male) or (if SPPROXY = 2 and IN6-ROSTREL $=2$ <br> and IN13-SPMARSTA=1 (married) and spouse gender is male) <br> [or his husband] if SPPROXY $=2$ and $\operatorname{IN6}$-ROSTREL not in $(2,56)$ and $\operatorname{IN13-SPMARSTA=1~(married)~and~spouse~gender~is~male~and~IN11-~}$ <br> ROSTSEX $=1$ (male)) <br> [or her husband] if SPPROXY $=2$ and IN6-ROSTREL not in $(2,56)$ and IN13-SPMARSTA $=1$ ( $m$ arried) and spouse gender is male and IN11- <br> ROSTSEX $=2$ (female) <br> [or your wife] (if SPPROXY = 1 and IN13-SPMARSTA=1 (married) and spouse gender is female) or (if SPPROXY $=2$ and $\operatorname{IN6}$-ROSTREL $=2$ and and IN13-SPMARSTA=1 (married) and spouse gender is female) <br> [or his wife] if SPPROXY $=2$ and IN6-ROSTREL not in $(2,56)$ and IN13-SPMARSTA=1 (married) and spouse gender is female and IN11- <br> ROSTSEX = 1 (male)) <br> [or her wife] if SPPROXY $=2$ and IN6-ROSTREL not in ( 2,56 ) and IN13-SPMARSTA=1 (married) and spouse gender is female and IN11- <br> ROSTSEX $=2$ (female) <br> [or your partner] (if SPPROXY $=1$ and someone on person roster rostrel $=56$ and hhflag $=1$ ) or (if SPPROXY $=2$ and IN6-ROSTREL $=56$ ) <br> [or his partner] if SPPROXY $=2$ and IN6-ROSTREL not in $(2,56)$ and someone on person roster rostrel $=56$ and hhflag $=1$ and IN11-ROSTSEX <br> $=1$ (male)) <br> [or her partner] if SPPROXY $=2$ and $\operatorname{IN6}$-ROSTREL not in $(2,56)$ and someone on person roster rostrel $=56$ and hhflag $=1$ and IN11- <br> ROSTSEX $=2$ (female)) <br> [Do you] if SPPROXY $=1$ or (SPPROXY $=2$ and IN6-ROSTREL in $(2,56)$ ) <br> [Does SP] if SPPROXY $=2$ and IN6-ROSTREL not in $(2,56)$ |  | $\begin{aligned} & \text { (1) Co2 } \\ & \text { (2) FSITRO1 } \\ & (-8) \text { SSINTRO1 } \\ & (-9) \text { SSINTRO1 } \end{aligned}$ |


| numcar | co2 | quantity unit | How many vehicles \{do you/does SP\} \{or \{your/his/her\} \{husband/wife/partner\}\} own? <br> ENTER NUMBER OF VEHICLES | (1) <br> (continuous <br> [estonse] <br> resp) <br> $(-8$ DON'T <br> KNOW <br> $(-9)$ REFUSED | $[$ [do you] if SPPROXY $=1$ or (SPPROXY $=2$ and IN6-ROSTREL in $(2,56)$ ) [does SP] if fPPROXY $=2$ and IN6-ROSTREL not in $(2,56)$ <br> [or your husband] (if SPPROXY $=1$ and $\operatorname{IN13-SPMARSTA=1~(married)~and~spouse~gender~is~male)~or~(if~SPPROXY~}=2$ and $\operatorname{NN} 6$-ROSTREL $=2$ and IN13-SPMARSTA=1 (married) and spouse gender is male) <br> [or his husband] if SPPROXY $=2$ and $\operatorname{IN6}$-ROSTREL not in $(2,56)$ and $\operatorname{IN13}$-SPMARSTA=1 ( married ) and spouse gender is male and IN11ROSTSEX $=1$ (male)) <br> [or her husband] if SPPROXY $=2$ and ING-ROSTREL not in $(2,56)$ and $\operatorname{IN13-SPMARSTA=1~(married)~and~spouse~gender~is~male~and~IN11-~}$ ROSTSEX $=2$ (female) <br> [or your wife] (if SPPROXY $=1$ and IN13-SPMARSTA $=1$ (married) and spouse gender is female) or (if SPPROXY $=2$ and IN6-ROSTREL $=2$ and and IN13-SPMARSTA=1 (married) and spouse gender is female) <br> [or his wife] if SPPROXY $=2$ and $\operatorname{IN6}$-ROSTREL not in ( 2,56 ) and IN13-SPMARSTA=1 (married) and spouse gender is female and IN11ROSTSEX $=1$ (male)) <br> [or her wife if $\operatorname{SPPROXY}=2$ and $\operatorname{IN} 6$-ROSTREL not in $(2,56)$ and $\operatorname{NN13}$-SPMARSTA $=1$ (married) and spouse gender is female and IN11ROSTSEX $=2$ (female) <br> [or your partner] (if SPPROXY $=1$ and someone on person roster rostrel $=56$ and hhflag $=1$ ) or (if SPPROXY $=2$ and IN6-ROSTREL $=56$ ) [or his partner] if SPPROXY $=2$ and IN6-ROSTREL not in $(2,56)$ and someone on person roster rostrel $=56$ and hhflag $=1$ and IN11-ROSTSEX $=1$ (male)) <br> [or her partner] if SPPROXY $=2$ and IN6-ROSTREL not in $(2,56)$ and someone on person roster rostrel $=56$ and hhflag $=1$ and IN11ROSTSEX $=2$ (female)) |  | $\left\lvert\, \begin{aligned} & (1) \text { BOX CO2 } \\ & (-8) \text { FSINTRO1 } \\ & (-9) \text { FSINTRO1 } \end{aligned}\right.$ |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | B0x C02 | routing | fi CO2 6 E 2 go to CO3 else go to FSINTRO1 |  |  |  |  |
| PVCAR1 | c03 | quantity unit | Altogether, what is their present value, that is, about how much would they bring if $\{y$ ou/SP\} sold them on today's market? <br> ENTER DOLLAR AMOUNT |  | [you] if SPPROXY $=1$ or (SPPROXY $=2$ and ING-ROSTREL in $(2,56))$ SPP) if SPRPOXY $=2$ and ING-ROSTREL not in $(2,56)$ |  | $\begin{aligned} & (1) \text { FsINTRO1 } \\ & (-8) \text { CO3AA } \\ & (-9) \text { Co3A } \end{aligned}$ |
| PVCAR2 | C03A | code one | SHOW CARD HA32 IA35 <br> Please look at this card and tell me which is closest |  |  |  | FSINTRO1 |
| ESINTRO1 | FSINTRO1 | no entry | These next questions are about the food eaten in your/(SP) 's. househola in the last 12 months, since \{current month\} of last year and whether [you were/he was/se wass/they were] able to fofford the food [you need/he needs/she needs/they need]. |  |  |  | FS1 |


| Foodast | FS1 | code one | 'm going to read you some statements that people have made about their food situation. For these statements, please tell me whether the statement was often true, sometimes true, or never true for [you/your household/(SP)/(SP)'s household] in the last 12 months-that is, since last \{name of current month\}. <br> The first statement is, The food that [I/we/(SP)/(SP) or other adults in (SP)'s household] bought just didn't last, and [1/we/he/she/they] didn't have money to get more. <br> Was that often, sometimes, or never true for [you/your household/(SP)/(SP)'s household] in the last 12 months? | (1) Often <br> TRUE <br> (2) <br> SOMETIMES <br> TRUE <br> (3) NEVER <br> TRUE <br> (-8) DON'T <br> KNOW <br> (-9) REFUSED | ```[you] SPPROXY = 1(sample person) and SP lives alone your household] (IF SPPROXY = 1 (SAMPLE PERSON) or ((SPPROXY = 2(PROXY) and the proxy's HHFLAG = 1)) and count of persons with HHFLAG = 1 is more than one [(SP)] IF SPPROXY = 2(proxy) and SP lives alone [(SP)'s household] If SPPROXY = 2(proxy) and count of persons with HHFLAG = 1 is more than one and proxy's HHFLAG ne 1 1] SPPROXY = 1(sample person) and SP lives alone [We] (If SPPROXY = 1 (SAMPLE PERSON) or ((SPPROXY = 2(PROXY) and the proxy's HHFLAG = 1)) and count of persons with HHFLAG = 1 is nore than one ((SP)] IF SPPROXY = 2(proxy) and SP lives alone and SP is male (SP) or other adults in (SP)'s household] If SPPROXY = 2(proxy) and count of persons with HHFLAG = 1 is more than one and proxy's HHFLAG ne 1 1] SPPROXY = 1(sample person) and SP lives alone [We] (If SPPROXY = 1 (SAMPLE PERSON) or ((SPPROXY = 2(PROXY) and the proxy's HHFLAG = 1)) and count of persons with HHFLAG = 1 is nore than one The] IF SPPROXY = 2(proxy) and SP lives alone and SP is male she] IF SPPROXY = 2(proxy) and SP lives alone and SP is female [they] If SPPROXY = 2(proxy) and count of persons with HHFLAG = 1 is more than one and proxy's HHFLAG ne 1 (youl SPPROXY = 1(sample person) and SP lives alone your household] (IFSPPROXY = 1 (SAMPLE PERSON) or ((SPPROXY = 2(PROXY) and the proxy's HHFLAG = 1)) and count of persons with HHFLAG = 1 is more than one (SP)] IF SPPROXY = 2(proxy) and SP lives alone [(SP)'s household] If SPPROXY = 2(proxy) and count of persons with HHFLAG = 1 is more than one and proxy's HHFLAG ne 1``` | 52 |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| FOODLAST_Often | 2-52 | code one | The next statement is: [1/we/(SP)/(SP or other adults in (SP)'s household] couldn't afford to eat balanced meals. Was that often, sometimes, or never true for [you/your household/(SP)/(SP)'s household] in the last 12 months? <br> IIF NEEDED: For these statements, please tell me whether the statement was often true, sometimes true, or never true for [you/your household/(SP)/(SP)'s household] in th last 12 months-that is, since last \{name of current month\}.] |  |  |  |
| SKIPMEAL | ES3 | code one | In the last 12 months, since last name of current month) or other adults in (SP)'s household] ever cut the size of vour meals of skip meals because there wasn't enough money for food? | $\square$ |  |  |
| SKIPMEAL_Often | F53A | code one | How often did this happen-almost every month, some months but not every month, or in only 1 or 2 months? |  |  | F54 |
| EATLESS | FS4 | code one | In the last 12 months, did [you/(SP)] ever eat less than you/he/she] felt [you/he/she] should because there wasn't enough money for food? |  |  |  |
| HUNGRY | FS5 | code one | In the last 12 months, [were you/was (SP)] ever hungry but didn't eat because there wasn't enough money for food? |  | $\left[\begin{array}{l}\text { [were you] SPPROXY }=1 \text { (sample person) } \\ \text { [was (SP)] SPPROXY }=2(\text { proxy }\end{array}\right.$ | box endial |

