

Consumer Expenditure Survey

Quarterly Interview Survey

Information Booklet

CE-305

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TABLE OF CONTENTS

	Page
Privacy Act Statement	2
Demographics	3
Section 1 – General Housing Characteristics	5
Section 2 – Rented Living Quarters	6
Section 3 – Owned Living Quarters and Other Owned Real Estate	7
Section 4 – Utilities and Fuels	10
Section 5 – Construction, Repairs, Alterations, and Maintenance of Property	12
Section 6 – Appliances, Household Equipment and Other Selected Items	15
Section 7 – Household Item Repairs, Service Contracts, and Extended Warranties	22
Section 8 – Home Furnishings and Related Household Items	23
Section 9 – Clothing and Clothing Services	27
Sections 10 and 11 – Rented, Leased, and Owned Vehicles	30
Section 12 – Vehicle Operating Expenses	31
Section 13 – Insurance Other than Health	33
Section 14 – Health Insurance	34
Section 15 – Medical and Health Expenses	35
Section 16 – Educational Expenses	37
Section 17 – Subscriptions, Memberships, Books, and Entertainment Expenses	38
Section 18 – Trips and Vacations	40
Section 19 – Miscellaneous Expenses	42
Section 20 – Expense Patterns for Selected Services and Goods	45
Section 21 – Occupations	46
Section 21 – Work Experience and Income	47
Section 22 – Assets and Liabilities	50
2015 Calendar	52
2016 Calendar	53
Fraction Conversion Chart	54

PRIVACY ACT STATEMENT

The U.S. Census Bureau is conducting the Consumer Expenditure Surveys for the Bureau of Labor Statistics of the U.S. Department of Labor under Title 29, United States Code. The survey's purpose is to obtain information on what Americans are purchasing in order to update the Consumer Price Index. All survey information will be used for statistical purposes only.

Any information you provide for this survey is confidential, by law, under Title 13, United States Code. Participation in this survey is voluntary and there are no penalties for refusing to answer any question(s). However, your cooperation is extremely important to help ensure the completeness and accuracy of these data.

Hispanic Origin

1. Mexican
2. Mexican-American
3. Chicano
4. Puerto Rican
5. Cuban

Race

(Please choose one or more)

1. White
2. Black or African American
3. American Indian or Alaska Native
4. Asian
5. Native Hawaiian
6. Guamanian or Chamorro
7. Samoan
8. Other Pacific Islander

Asian Origin

1. Chinese
2. Filipino
3. Japanese
4. Korean
5. Vietnamese
6. Asian Indian

Education



1. No schooling completed, or less than 1 year
2. Nursery, kindergarten, and elementary (grades 1-8)
3. High school (grades 9-12, no degree)
4. High school graduate – high school diploma or the equivalent (GED)
5. Some college but no degree
6. Associate's degree in college
7. Bachelor's degree (BA, AB, BS, etc.)
8. Master's, professional, or doctoral degree (MA, MS, MBA, MD, JD, PhD, etc.)

Armed Forces



A person is considered to be in the Armed Forces if he or she serves in any branch of the U.S. military. This includes the Army, Navy, Marine Corps, Air Force, and Coast Guard; their Reserve components; and the Air and Army National Guard.

SECTION 1 – GENERAL HOUSING CHARACTERISTICS

Type of Structure

1. **Single family detached**

A detached structure with only one primary residence; however, the structure could include a rental unit(s) in the basement, attic, etc.

2. **Row or townhouse**

An inner unit (2, 3, or 4 story structure) with 2 walls in common with other units and a private ground level entrance; it may have a rental unit as part of the structure.

3. **End row or end townhouse**

Shares only one common wall with other units.

4. **Duplex**

A detached two unit structure with all units occupying the same level or levels.

5. **3-plex or 4-plex**

3 or 4 unit structure with all units occupying the same level or levels.

6. **Garden**

A multi-unit structure, usually wider than it is high, having 2, 3, or possibly 4 floors; characteristically the units not only have common walls but are also stacked on top of one another.

7. **High rise**

A multi-unit structure which has 4 or more floors.

8. **Apartment or flat**

A unit not described above; it could be located in the basement, attic, second floor, or over the garage of one of the units described above.

9. **Mobile home or trailer**

10. **College dormitory**



SECTION 2 – RENTED LIVING QUARTERS

Included in the Housing Unit

Cooking stove, range, or oven

Refrigerator or home freezer

Built-in dishwasher

Portable dishwasher

Clothes washer

Clothes dryer



Included with the Rental Payment

Electricity

Gas

Piped-in water

Heating

Trash/garbage collection

Garage and parking facilities

Telephone services

Television services

Internet services

Furniture



SECTION 3 – OWNED LIVING QUARTERS AND OTHER OWNED REAL ESTATE

Included with this Housing Unit

1. Swimming pool
2. Off-street parking
3. Porch, terrace, patio, or balcony
4. Apartment or guest house
5. Central air conditioning
6. Window air conditioning



Types of Owned Real Estate

1. A home in which you used to live
2. Other homes, vacation homes, and recreational properties including timeshares
3. Commercial real estate or farmland
4. Homes rented out or owned only for investment purposes
5. Land with no buildings on it



Closing Costs

Property survey charges	Points paid by buyer
Title search	Deed preparation
Recording fees	Lawyer's fees
Transfer taxes	Advertising costs
Escrow payment	Real estate listing fees



Section 3 – Owned Living Quarters and Other Owned Real Estate

Costs for Selling a Property

Commission to Realtor	Lawyer's fees
Closing costs	Advertising costs
Points for financing	Deferred mortgage interest payment
Mortgage penalties	Real estate listing fees
Property inspection	



Mortgage Payment Items

1. Principal
2. Interest
3. Property taxes
4. Property insurance
5. Mortgage guarantee insurance
6. Any other payments (specify)



Fees for Cooperatives

1. Repayment of loans owed by cooperative
2. Property taxes
3. Property insurance
4. Management
5. Repairs or maintenance, including lawn care or snow removal
6. Improvements
7. Recreational, including swimming, golf, or tennis, facilities
8. Security, including guards or alarm systems
9. Utilities, such as gas, electricity, water, heat
10. Trash collection
11. Other (Specify)



Homeowner's Associations or Condominium Fees

1. Management
2. Repairs or maintenance, including lawn care or snow removal
3. Improvements
4. Utilities, such as gas, electricity, water, heat
5. Parking
6. Recreational, including swimming, golf, or tennis facilities
7. Security, including guards or alarm systems
8. Maid service
9. Medical services
10. Trash collection
11. Other (specify)



SECTION 4 – UTILITIES AND FUELS

Part A – Telephone Expenses

Telephone services included in bill

1. Residential service including Voice over IP (VoIP)
2. Mobile/cellular service including prepaid
Includes “pay-as-you-go” cell service

Other telephone and non-telephone service items included in the phone bill

1. Internet service (including broadband, DSL, or dial-up)
2. Cable or satellite television services
Includes DVR service and on-demand/pay-per-view
3. Applications, games, or ringtones



Part B – Other Telephone Expenses

Pre-paid long distance telephone cards/minutes

Part C – Cable, Satellite, and Internet Services

1. Cable or satellite TV, not already reported

Cable TV Direct TV Dish TV TiVo

Includes DVR service and on-demand/pay-per-view

2. Satellite radio services

Sirius Radio XM Radio

3. Internet connection or internet service providers, not already reported

AOL ISPs Comcast Verizon 3G/4G internet for tablets

4. Internet services away from home such as web cafes or internet kiosks

Includes wi-fi access in hotels, airports, and airplanes



Part D – Utilities, Fuels, and Services

- 1. Electricity**
- 2. Natural or utility gas**
- 3. Fuel oil**
- 4. Bottled or tank gas**
 - propane
 - kerosene
- 5. Other fuels including wood**
- 6. Piped-in water and sewerage maintenance**
- 7. Garbage and recycling collection, including –**
 - hazardous waste collection
 - waste disposal
 - recyclable material collection
- 8. Water softening service**
- 9. Septic tank cleaning**



SECTION 5 – CONSTRUCTION, REPAIRS, ALTERATIONS, AND MAINTENANCE OF PROPERTY

Job Types

1. Homes under construction, including a vacation home or second home

2. Building an addition to the house or a new structure, such as a porch, garage, or new rooms

kitchen, bedrooms, family rooms, general purpose rooms, basement, etc.

decks, porches, patio, and terraces added or improved

attached garages, carports, breezeways, greenhouses, and sheds

detached garages or carports added or improved

other detached outside buildings added or improved (sheds, greenhouses, storm cellars)

other outside additions or alterations (boat docks, terracing, grading and filling, retaining walls)

3. Finishing a basement or an attic or enclosing a porch

4. Remodeling one or more rooms in the house

interior restructuring or other areas (removing or adding walls and/or the creation of new rooms within the structure or the demolition of part of the structure)

bathroom remodeling

kitchen remodeling

5. Landscaping the grounds or planting new shrubs or trees

6. Building outdoor patios, walks, fences, or other enclosures, driveways, permanent swimming pools, or hot tubs

recreational facilities

patios and terraces

fences added or improved

detached building

driveways and walkways added or improved



7. Repairing outdoor patios, walks, fences, driveways, or permanent swimming pools (including permanent above-ground swimming pools)

fences patios and terraces recreational facilities

8. Painting, either interior or exterior, or wallpapering

combination of painting and wallpapering wallpaper
varnish, sealant, lacquer, and waterproofing

9. Plastering or paneling

also includes drywall patching

10. Plumbing or water heating installations or repairs

plumbing fixtures water heater
septic tank built-in dishwasher or laundry tubs
all interior water pipes external sprinkler systems, septic tanks, and wells
garbage disposal

11. Electrical work

includes garage door opener

12. Heating or air conditioning jobs

13. Flooring installation, repair, or replacement, including carpeting, wood, vinyl, and tile

carpet other flooring including wood, slate, marble, or
tile, linoleum, or vinyl concrete

14. Insulation

15. Roofing, gutters, or downspouts

complete re-roofing repair of shingles, gutters, downspouts, etc.
combined replacements combined maintenance and repairs including
including re-roofing roofing

16. Siding

17. Installation, repair, or replacement of window panes, screens, storm doors, awnings, and the like

windows (interior or exterior) doors (interior or exterior)

18. Masonry, brick, or stucco work

19. Other improvements or repairs (include security systems that are hard-wired into the home)

Appliances

1. Cooking stove, range, or oven

2. Microwave oven

3. Refrigerator or home freezer

mini refrigerator wine refrigerator

4. Built-in dishwasher

5. Portable dishwasher

6. Garbage disposal

7. Clothes washer or dryer

8. Range hood

9. Smoke alarms and detectors

10. Window air conditioner

11. Portable cooling and heating equipment

portable dehumidifiers humidifiers fans space heaters

Do not include window air conditioners.

12. Lamps, lighting fixtures, or ceiling fans

13. Other major home appliances and equipment

trash compactor water softener central air conditioner
furnace heat pump

SECTION 6 – APPLIANCES, HOUSEHOLD EQUIPMENT, AND OTHER SELECTED ITEMS

Part A – Major Household Appliances

1. **Microwave oven**
2. **Cooking stove, range, or oven**
3. **Range hood**
4. **Refrigerator or home freezer**
 mini refrigerator wine refrigerator
5. **Built-in dishwasher**
6. **Portable dishwasher**
7. **Garbage disposal**
8. **Clothes washer or dryer**

Section 6 – Appliances, Household Equipment, and Other Selected Items

Part B – Household Appliances and Other Selected Items

SMALL HOUSEHOLD APPLIANCES

1. Small electrical kitchen appliances, including –

blender	electric grill	food processor	rice cooker
breadmaker	electric fondue set	hot plate	sandwich grill
coffee grinder	electric frying pan	ice cream maker	slow cooker
coffee maker	electric iron	juicer	smoothie maker
crockpot	electric knife	mixer	toaster
deep fryer	electric timer	pizza oven	toaster oven
electric barbecue	electric wine chiller	popcorn maker	waffle iron
electric can opener	electric wok		

2. Electrical personal care appliances, including –

curling iron	digital scale	hair dryer	water-pik
denture cleaner	electric toothbrush	heating pad	
electric hair trimmer	facial sauna	make-up mirror	
electric razor	foot bath	massager	

3. Electrical floor cleaning equipment, including –

vacuum cleaner	hand vacuum	rug shampooer	floor polisher/buffer
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4. Other household appliances, including –

trash compactor	home security device (burglar alarm) including console,
air purifier	control modules, burglar alarm console, door and window
water filters	transmitters
smoke detector	carbon monoxide detector
water leak alarm	

5. Sewing machines (with or without cabinet), including –

knitting machines	quilting machines	sergers
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6. GPS devices, calculators, and fax machines, including –

typewriters	copy machines
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7. Digital book readers or tablets, including –

iPad	Kindle	Nook	Galaxy tablet
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8. Computers, computer systems, or related hardware, including

CD/DVD drive	monitors	memory	home computers with or
computer printers	fax modems	modems	without monitors
netbooks	scanner	cables	external hard drive
laptops	keyboards	mouse	

9. Computer software, including computer games

10. Computer accessories, including –

printer cartridges mouse pads

11. Portable memory, such as flash drives, memory cards, and recordable discs and tapes, including –

thumb drives	blank CDs/DVDs	memory stick	USB flash drive
SD card			

12. Video game hardware or accessories, including –

Nintendo Wii	Gamecube	Nintendo DS	PSP
Gameboy	Playstation	Xbox	

Do not include video games.

13. Telephones or accessories, including –

cell phones	headsets	cordless telephones	smartphones
answering machines	chargers	cell phone covers	
phone jacks and cords		Bluetooth accessories	

14. Photographic equipment, including –

camera	filter	projection screen	battery pack for camera flash
digital camera	winder	electro flash	motor driven film advancer
lens	enlarger	projector	strobe light (for photographs)
tripod			

Do not include film, film processing, or other photographic supplies.

Section 6 – Appliances, Household Equipment, and Other Selected Items

15. Musical instruments, supplies, or accessories, including –

keyboards	music books	clarinet	brass instruments
guitar	saxophone	drums	carrying case
piano	sheet music	music stand	stringed instruments
reeds	trumpet	picks	strings for musical instruments
trombone	valve oil	rosin	any other musical accessories
woodwinds			

Do not include repairs, music lessons, or band uniforms.

16. Lawn mowing machinery or other yard equipment, including –

rake	lawn mower	snow blower	electric lawn trimmer
shovel	tiller	wheelbarrow	tractor (farm, garden, etc.)
spreader	garden hose	weed digger	edger

TOOLS FOR HOME USE

17. Power tools, including –

lathe	electric drill	cordless drill	cordless circular saw
router	electric saw	electric polisher	air compressor
sander	electric plane	trouble light	electric swimming pool cleaning equipment

18. Non-power tools including –

axe	hammer	pliers	screwdriver
caulking gun	level	saw	wrench
plane	sockets		

HEATING AND COOLING EQUIPMENT

19. Window air conditioners

20. Portable cooling or heating equipment, including –

space heater	dehumidifier	humidifier	fan
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TVS, RADIOS, VIDEO, AND SOUND EQUIPMENT INCLUDING IN VEHICLES

21. Televisions, all types including those installed in vehicles, including –

combo TV/DVD players HD TV 3-D TV TVs in cars

22. DVD players, VCRs, DVRs, or video cameras, including –

TiVo unit digital TV converter box
Blu-ray disc player video tape recorder/player
high definition disc player video laser disc player
combination of VCR/DVD player video cassette recorder/player

23. Satellite dishes, receivers, or accessories

24. Handheld personal music players, including –

iPod personal mp3 players

25. Stereos, radios, speakers, and sound components, including those installed in vehicles, including –

car stereo amplifier equalizer satellite radio
CB radio clock radio compact disc players audio cassette
mixer receiver short-wave radio players/recorders
speakers turntable tuner
stereo walkie talkie stereo system

26. Other sound or video equipment including accessories, including –

earphones/headphones battery packs adapter for sound equipment
power converter power booster base station CB antenna
antenna (TV, radio, etc.) headset microphone

SPORTS, RECREATION, AND EXERCISE EQUIPMENT

27. General sports equipment, including –

- | | | | |
|---|--------------|------------------|------------------------|
| roller blades | baseball bat | baseball glove | badminton set |
| sports uniform | football | boxing equipment | soccer ball |
| tennis racket | basketball | lawn games | golf bag |
| bowling ball | racquetball | Frisbee | golf clubs |
| basketball hoop | skateboard | volleyball | karate equipment |
| racquetball racket | helmets | pads | table tennis equipment |
| other sports
protective
equipment | | | |

Do not include specialized athletic shoes such as for football, baseball, soccer, biking, and bowling.

28. Health and exercise equipment, including –

- | | | | |
|----------------|--------------|--------------|-----------|
| trampoline | exercise mat | weight bench | pedometer |
| weights | home gym | treadmill | exercycle |
| rowing machine | | | |

29. Camping equipment, including –

- | | | | |
|---|--------------|------------------|--------------|
| tent | sleeping bag | camping stove | canteen |
| kerosene lantern | sleeping pad | camping cookware | air mattress |
| frame packs and
other camping
packs | | portable heater | screenhouse |

30. Hunting and fishing equipment, including all guns, including –

- | | | | |
|---------------------------|---------|---------------|---------------|
| bow and arrow | knife | BB/pellet gun | handgun |
| fishing rod and
tackle | rifle | ammunition | scopes |
| | shotgun | crossbow | fishing lures |

Section 6 – Appliances, Household Equipment, and Other Selected Items

31. Winter sports equipment, including –

snow skis	ski poles	toboggan	sled
ski boots	ice skates	snowboard equipment	
snowboard	ice boat	sledding equipment	

32. Water sports equipment, including –

water skis	snorkel	diving equipment	swim cap
life jacket	water ski vest	raft	surf board
skim board	wake board	wind/paddle board	boogie board

33. Outboard motors

34. Bicycles or bicycle equipment, including –

bicycle helmets	stand	tires	tubes
bicycle parts	locks	rack	supplies
bike pump			

35. Tricycles or battery powered riders, including –

Big Wheels

36. Playground equipment, including –

portable swimming pool	swing set	sand box	gym set
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37. Other sports or recreation equipment, including –

telescope	metal detector	paintball equipment
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SECTION 7 – HOUSEHOLD ITEM REPAIRS, SERVICE CONTRACTS, AND EXTENDED WARRANTIES

- 1. Garbage disposal, range hood, or built-in dishwasher**
- 2. Other household appliances, such as –**

washer	refrigerator
range/oven	portable heating equipment
portable air conditioning equipment	window air conditioner
portable fans	dehumidifiers
sewing machines	vacuum cleaners
- 3. Televisions, radios, video and sound equipment, including those installed in automobiles or other vehicles**
- 4. Computers, computer systems, or related equipment for non-business use**

technical support	accidental damage
AppleCare	Geek Squad
- 5. Lawn and garden equipment**

lawn mower repair	snow blower repair
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- 6. Musical instruments or accessories**

professional tuning
- 7. Hand or power tools**
- 8. Photographic equipment**
- 9. Sport or recreational equipment**

bicycle repair	outdoor sports equipment repairs
golf club repair	exercise equipment repairs
tennis racket repair	gun repair
- 10. Termite or pest control**
- 11. Heating or air conditioning service contracts, covering –**

central air conditioners	central coolers
furnaces	heat pumps

SECTION 8 – HOME FURNISHINGS AND RELATED HOUSEHOLD ITEMS

Part A – Purchases

LIVING, FAMILY, OR RECREATION ROOM FURNITURE

1. Sofas, including –

sofabed loveseat sectionals futon

2. Living room chairs, including –

recliner convertible chair rocker swivel chair
bean bag chair

3. Living room tables, including –

coffee table end tables TV table lamp table

4. Ping-pong tables, pool tables, or other similar recreation room items

5. Other living, family, or recreation room furniture including desks, wall units, and shelving, including –

bookcase curio cabinet entertainment center
room divider bar stools desk/chair card table/chairs
coat rack gun cabinet portable bar or cart foot stool (ottoman)

6. Living room furniture combinations, including –

sofa, chair, and table combinations or suites

DINING ROOM AND KITCHEN FURNITURE

7. Dining room or kitchen furniture, including –

dinette set buffet serving table or cart
kitchen chairs china cabinet dining table and chairs

BEDROOM FURNITURE

8. Mattresses or box springs, including roll-aways

9. Bedroom furniture other than mattresses or box springs, including –

headboard dresser mirrors bunk bed
bed frames vanity chairs night tables
chest armoire mattress topper water bed

Section 8 – Home Furnishings and Related Household Items

INFANTS FURNITURE AND EQUIPMENT

10. Infants' furniture, including –

crib	mattress	toy chest	changing table
playpen	dresser	bassinet	portable crib
high chair	chest		

11. Infants' equipment, including –

carriage	baby gate	baby bottle sterilizer	baby monitor
stroller	swing	baby travel systems	jogging stroller
car seat	guard rail	baby carrier/backpack	

OUTDOOR FURNITURE AND EQUIPMENT

12. Patio, porch, or outdoor furniture, including –

patio umbrella	chaise lounge	picnic table	beach chair
porch swing	hammock	canopy	patio set

13. Barbecue grills or outdoor decorative items, including –

patio lanterns	patio statues	bird houses	bird bath
fountain	statue	outdoor flag	wind chimes
planters	tiki torches	inflatable lawn decorations	

OFFICE FURNITURE FOR HOME USE

14. Office furniture for home use, including –

file cabinet	office chairs	computer furniture	drafting table
safe			

Do not include any furniture used exclusively for business.

HOUSEHOLD DECORATIVE ITEMS

15. Lamps, lighting fixtures, or ceiling fans, including –

chandeliers	sconces	table lamps
floor lamps	track lights	ceiling fans with/without lights
recessed lighting		

16. Other household decorative items, including –

painting	baskets	fireplace equipment and accessories
vase	silk flowers	seasonal decorations (Christmas)
wall hangings	mirror	wreaths
plant stand	book ends	clocks
Christmas lights		

CLOSET STORAGE AND TRAVEL ITEMS

17. Closet and storage items, including –

garment bag	hangers	shoe rack	drawers
garment racks	hanging bags	shoe bag	shelf organizers
drawer organizers	hampers	underbed storage	storage bins

18. Travel items including luggage, also including –

travel garment bags	trunk	briefcase	backpack
messenger bag	tote bag	toiletry bag	travel pillow
passport holder			

DISHES, DINNERWARE, FLATWARE, GLASSWARE, AND COOKWARE

19. Stainless, silver, or other flatware, except plastic

20. Non-electric cookware, including –

skillet	roaster	pots	pressure cooker
saucepan	pans	teakettle	casserole dishes

21. Dishes, glasses, or serving pieces, including –

trays	pitchers	bowls	cups
mugs	plates	platters	crystal
stemware	china	Tupperware	

Section 8 – Home Furnishings and Related Household Items

HOUSEHOLD LINENS

22. Bedroom linens, including –

sheets	comforter	baby blanket	blanket
pillowcases	mattress pad	electric blanket	bedspread
pillows	quilt	duvet	

23. Bathroom linens, including –

towels	shower curtain	bath mat	toilet cover
face cloths	tub mat	wash cloths	

24. Kitchen, dining room, or other linens, including –

tablecloths	cloth napkins	placemats	small appliance covers
dish towels	dish cloths	furniture protectors	covers for living room tables
doilies	chair pads		

25. Slipcovers, decorative pillows, or cushions, custom or ready-made

FLOOR AND WINDOW COVERINGS

26. Rugs or other non-permanent floor coverings, including carpet squares

27. Curtains or drapes (either custom or ready-made)

28. Blinds, shades, or other window coverings (either custom or ready-made)

Part B – Rental, Leasing, or Repair of Furniture

Rental or leasing of furniture

Repairing, refinishing, or reupholstering furniture, including the cost for fabric

SECTION 9 – CLOTHING AND CLOTHING SERVICES

Part A – Clothing, Footwear, and Accessories

1. Coats, jackets, or furs, including –

shawl/stole raincoat down vest

2. Sport coats, tailored jackets, or blazers

3. Suits, including –

woman's suit (of two or more pieces) formal suit

man's suit (of two or more pieces) tuxedo

Do not include tuxedo rentals.

4. Vests (purchased separately, not with a suit), excluding sweater vests and down vests

5. Shirts, sweaters, blouses, or tops, including –

cardigan pullover v-neck sweater knit blouses
sweater vest ski sweater sport shirts maternity tops
dress shirts T-shirts

Do not include any sweat shirts or athletic shirts.

6. Pants, jeans, or shorts, including –

jump suit overalls maternity pants dress slacks
short sets

Do not include any athletic shorts.

7. Dresses, including –

two-piece dresses wedding gown maternity dresses formals or semi-formals

8. Skirts, including skorts

Do not include any tennis skirts, golf skirts, or other athletic skirts.

9. Undergarments, including –

bras undershirts slips
shapewear underwear thermal underwear

10. Hosiery, including –

socks knee-highs tights pantyhose

11. Nightwear or loungewear, including –

pajamas night shirt night gown
robe house coat thermal sleeping garments

Section 9 – Clothing and Clothing Services

12. Accessories, including –

umbrellas	gloves	apron	fold-up rain accessories
belts	mittens	ear muffs	bandannas
ties	purse	handkerchiefs	hand bag
scarves	wallet	bridal headpiece	non-prescription sunglasses

13. Swimsuits or warm-up or ski suits, including –

athletic shorts	tennis outfit	sweatshirt	swimwear accessories
athletic shirt	jogging suit	swimwear	snow and ski suit
hunting wear	leotards		

Do not include any sports uniforms.

14. Uniforms, other than sport, for which the cost is not reimbursed, including

school uniforms	scout uniforms	work uniforms	medical scrubs
barber smocks	lab smocks	military uniforms	

15. Costumes, including –

dance and ballet performances
stage performances
Halloween

16. Footwear, including athletic footwear –

dress shoes	sandals	bedroom slippers
casual shoes	boots	sneakers, jogging, aerobic, basketball, tennis shoes

Include specialized athletic shoes such as for football, soccer, bowling, biking, or baseball, except if included in the rental or activity fee for the sport.

17. Diapers, including disposable

Do not include diaper service.

18. Layettees

19. Watches

pocket watches	wristwatches
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Do not include GPS or heartrate watches or “smartwatches.”

20. Jewelry, including –

rings	infants jewelry	necklaces	earrings
bracelets	costume jewelry		

Part B – Clothing Services

1. Repair, alteration, and tailoring for clothing and accessories

hemming sew buttons zipper replacement dress alterations
wallet repair handbag repair

2. Shoe repair or other shoe services

new soles stretching replace heel re-stitching
waterproofing dyeing inserting lifts orthopedic modification

3. Watch or jewelry repair, including cleaning

ring sizing replace setting replace/add stones cleaning
replace battery

4. Clothing or accessory rental, including formal wear

tuxedo or suit rental handbag rental

5. Clothing storage outside the home

cold storage for furs

SECTION 10 – RENTED, LEASED, AND OWNED VEHICLES

1. Automobile, truck, minivan, van, and SUV

Include fees for car sharing services such as Zipcar in rented vehicles.

2. Motor home

3. Trailer-type camper

4. Other attachable-type camper

5. Motorcycle, motor scooter, or moped (motorized bicycle)

6. Boat with a motor

jet skis
power boat

yacht
launch

cabin cruiser
pontoon boat

boat with outboard
motor

7. Boat without a motor

canoes
rowing shells

kayaks

rowboats

sailboats

8. Trailer other than camper

boat trailer
motorcycle trailer

cargo trailer
ATV trailer

utility trailer

horse trailer

9. Private aircraft

planes

gliders

helicopters

10. Any other vehicle

snowmobile
Segway

dune buggy

ATV

riding golf cart (except if
rental included in
golfing fees)

SECTION 12 – VEHICLE OPERATING EXPENSES

Part A – Vehicle Maintenance and Repair, Parts, and Equipment

1. Oil change, lubrication, or oil filter

2. Motor tune-up, including –

air/fuel filters	computer sensor	ignition wires	ignition timing or mixture adjustment
distributor cap, rotor	PCV valve	valve adjustment	
emission controls	spark plugs	air filter element	

3. Battery purchases or installation

4. Tire purchases or mounting

5. Tire repairs

6. Front end alignment, wheel balancing, or wheel rotation

7. Shock absorber replacement, including MacPherson struts

8. Body work or painting, including –

convertible top	doors	T-roof	crash repairs	sanding
glass replacement	vinyl top	rust proofing	window repair	

9. Any other vehicle or engine repairs, including –

air conditioning	brake pads	alternator	brake work
clutch or transmission	carburetor	fan switch or belt	bushings
electrical system work	car computer	axle work	battery charge
engine repair/replacement	compressor	recharge A/C	bearings
exhaust system work	condenser	ignition system	differential
transmission	fuel injector	muffler	fuel pump
steering	gaskets	timing belt	hydraulic system
suspension	radiator	power steering	

10. Vehicle accessories or customizing, including –

alarm system	carpeting	running boards	steering wheel covers
bike/ski racks	fender skirts	seat covers	spoilers
bumper guards	luggage rack		

11. Other vehicle services, parts, or equipment, including –

battery cables	vent filters	jack	charcoal canister filters
gas cable/cap/can	brake lights	gasket sets	windshield wipers
light bulbs	wheel lugs	headlights	speedometer cable
wheels/rims	hub caps	upholstery work	tire/wheel combination

12. Vehicle cleaning services including car washes, including –

boat cleaning services	vacuuming	vehicle detailing services
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Section 12 – Vehicle Operating Expenses

Part B – Licensing, Registration, and Inspection of Vehicles

- 1. Driver’s licenses**
 - 2. Vehicle inspection**
 - emissions inspection
 - safety inspection
 - 3. State vehicle registration**
 - 4. Local vehicle registration**
 - 5. Personal property taxes for vehicles**
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Part C – Other Vehicle Operating Expenses

Average monthly expense for gasoline

Purchased any antifreeze, brake fluid, transmission fluid, windshield wiper fluid, or additives

Parking

parking garages parking lot fees parking meters

Do not include expenses that are part of your property ownership or rental costs, a business expense, or expenses that will be totally reimbursed.

Local tolls or electronic toll passes

Docking and landing fees for boats and planes

Auto repair service policies such as extended warranties

Do not include service policies for vehicles used entirely for business.

Automobile service clubs such as AAA or services such as OnStar or LoJack

Towing charges, not already reported

Bottled or tank gas for recreational vehicles, including vans, campers, and boats

SECTION 13 – INSURANCE OTHER THAN HEALTH

1. **Long term care insurance**
2. **Life insurance or other policies which provide benefits in case of death or disability, including –**

term insurance	income or disability insurance
whole-life insurance	group-life insurance
cash benefits	straight-life insurance
flight insurance	life endowments
veterans insurance	burial insurance
annuities	
3. **Homeowners' insurance, which protects your home, furniture, personal effects, or other property against fire, flood, theft, loss, or damage, including –**

flood insurance	fire and extended coverage
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4. **Renters' insurance, which protects your furniture, personal effects, or other property against fire, flood, theft, loss, or damage**
5. **Automobile or other vehicle insurance, including –**

liability insurance	bodily injury insurance
collision insurance	property damage insurance
comprehensive insurance	no-fault insurance
6. **Other types of non-health insurance, including –**
 - credit card insurance
 - personal liability insurance
 - pet insurance
 - mortgage guarantee insurance
 - ambulance

Do not include malpractice insurance.

SECTION 14 – HEALTH INSURANCE

Parts A and B – Privately Obtained Health Insurance

Do not include Medicare Parts A, B, or D.

1. Health Maintenance Organization (HMO)

Expenses usually covered in full, or there may be a modest co-payment at the time of your visit.

- *Group/staff type:* You go to a central facility (group health center) to receive care.
- *Independent practice association (IPA):* Providers work from their individual offices (and are referred to as primary care physicians).

2. Fee for Service Plan (FFS or PPO)

You or your insurance company are generally billed after each visit. In a traditional fee for service plan, you may go to any doctor or hospital you choose. In a preferred provider organization (PPO), you are given a list of doctors from which to choose. If you go to a doctor on the PPO list, more expenses are covered than if you go to a doctor not on the list.

3. Commercial Medicare Supplement (Medicare Advantage, Medicare Part C, Medigap)

Voluntary contributory private insurance plan available to Medicare recipients. Covers the costs of deductibles, co-insurance, physician services, and other medical and health services.

4. Other Special Purpose Plan

Covers only specific health needs, generally one type of service. Examples include:

dental insurance

mental health insurance

prescription drug insurance

vision insurance

dread disease policy

cancer insurance

Do not include Medicare Prescription Drug (Medicare Part D) plans.

Part C – Medicare, Medicaid, and Health Insurance Not Paid for by the Household

Medicare (Parts A & B)

Medicare Prescription Drug Plan (Part D)

Medicaid

VA Medical, CHAMPVA, Children's Health Insurance Program (CHIP), Indian Health Service (HIS)

OTHER MEDICAL CARE SERVICES

7. Lab tests or x-rays

X-rays blood tests MRI CAT scan
other types of lab tests

Do not include services received in a hospital as an inpatient or services for eye and dental care.

8. Care in convalescent or nursing homes

Include all services provided and billed by a convalescent or nursing home.

9. Care for invalids, convalescents, handicapped, or elderly persons in the home

Do not include institutional or medical care.

10. Adult day care centers

11. Other medical care and services, such as –

blood donation oxygen services rescue services outpatient hospital care
ambulance services dialysis services emergency room services

If medical care is given in outpatient department or emergency room, include –

injections baby shots electro cardiogram physicians check up
allergy shots skin treatment cardiology test broken bones/sprains
hearing test cancer treatment immunizations blood pressure check

MEDICINE OR MEDICAL SUPPLIES

12. Hearing aids

13. Prescription drugs, including –

medical marijuana insulin asthma inhalers birth control

14. Purchase or rental of supportive or rehabilitative medical equipment, such as –

braces splints whirlpools crutches
cervical collars slings canes wheelchairs
ace bandages walkers orthotics power chair/scooter

15. Purchase or rental of medical or surgical equipment for general use, such as –

ice bags insulin needles hot water bottles syringes
ostomy supplies heating pads blood pressure kits oxygen
pollen masks vaporizers home defibrillator orthopedic appliances (supports)

Do not include items such as band-aids, gauze, cotton roll, and cotton balls.

SECTION 16 – EDUCATIONAL EXPENSES

1. Recreational lessons or other instructions, including –

golf	dancing	driving	tennis
music	photography	skiing	painting
sailing	swimming	sewing	instructional day camps
skydiving	needlepoint	cooking	self defense
driving lessons	horseback riding		

2. Preschool or child day care centers, including non-instructional day camps

3. Tuition, including pre-paid tuition, for –

college or university	business school	elementary school	high school
secretarial school	parochial school	vocational school	technical school
adult education	seminary	preparatory school	middle/junior high

Include only expenses paid directly to the school or other educational facility.

Do not report student loan payments.

4. Housing while attending school, including –

student dormitory	sorority	fraternity	housing for married students
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Include only expenses paid directly to the school or other educational facility.

5. Food or board while attending school

Include only expenses paid directly to the school or other educational facility.

6. Private school bus service

7. Test preparation or tutoring services

8. Purchase of any school books, supplies, or equipment, which has not already been reported, including –

text books	ruler	drafting equipment	laboratory equipment
microscopes	art supplies	technical books	cap and gown

9. Other school related expenses not already reported, including the rental of any school books or expenses, including –

laboratory fees	matriculation fees	transportation fees
registration fees	health fees	student union fees
laundry fees	athletic fees	rental of school books
cap and gown rentals	administration fees	rental of school equipment
SAT/GRE test fees		conferences and seminars

Do not report student loan payments.

SECTION 17 – SUBSCRIPTIONS, MEMBERSHIPS, BOOKS, AND ENTERTAINMENT EXPENSES

1. **Golf courses or country clubs**
2. **Health clubs, fitness centers, swimming pools, weight loss centers, or other sports or recreational organizations**
3. **Fees for participating in sports such as golf, bowling, biking, hockey, football, or swimming, including –**

tennis	billiards	triathlons	hunting and fishing licenses
running races	martial arts	club sports	basketball
baseball	bikesharing		
4. **Vacation clubs, including –**

Disney Vacation Club	RCI	Hilton Grand Vacations
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5. **Civic, service, fraternal, or other social organizations**
6. **Credit card membership fees**

credit card annual fees
7. **Shopping club memberships including warehouse clubs like Sam’s Club and discount memberships like Amazon Prime**
8. **Direct or online dating services, including –**

Match.com	eHarmony
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9. **Single or season tickets to spectator sporting events, including –**

football	baseball	hockey	soccer
auto racing	basketball	track events	
10. **Single or season tickets to plays, operas, or concerts**
11. **Tickets to movies, parks, or museums, including –**

historic sites	zoos	national/state parks	amusement parks
Disney World	water parks	IMAX	
12. **Single copies of newspapers, magazines, or periodicals including digital**
13. **Subscriptions to newspapers, magazines, or periodicals including digital**
14. **Books purchased through a book club, including –**

Doubleday Book Club	Children’s Book-of-the-Month	Audible.com Listener
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15. **Books or digital books not purchased through a book club, including –**

digital books	audio books	paperbacks	hardcover
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Do not include reference books or school books.

16. Photographic film or disposable cameras, including –

35 mm film single-use film cameras 8 mm film

17. Photo printing or processing, including –

digital photo processing video film processing photo books

18. Purchased music files, CDs, or records, including –

iTunes Amazon

Do not include blank/recordable discs or tapes.

19. Subscription music services such as Rhapsody or Pandora, including –

Spotify Last.fm

20. Purchased video files, Blu-Ray discs, or DVDs, including –

iTunes Amazon Instant Video UltraViolet

Do not include blank/recordable discs or tapes.

21. Rented video files or DVDs, including –

Netflix iTunes RedBox

Amazon Instant Video

Do not include on-demand movies or pay-per-view paid through your TV service.

22. Streaming video subscriptions, including –

Netflix Hulu Plus MLB.TV

Do not include on-demand movies or pay-per-view paid through your TV service.

23. Purchased video games, not including computer games, including –

Nintendo games Wii games Xbox games PlayStation games

24. Rented video games, including –

GameFly Gamerang

25. Applications, games, or ringtones for a cellphone or mobile device, not already reported, , including –

App Store Google Play Amazon App Store

26. Online games or other internet entertainment sites

Xbox Live

SECTION 18 TRIPS AND VACATIONS

Types of Trips

1. **Visiting relatives or friends**
 2. **Business trips**
 3. **Recreational trips, such as –**
 - sightseeing
 - sports events
 - club or organizational meetings
 - outdoor recreation
 4. **Any other trips that occur overnight or longer**
 5. **Any day trips to a place at least 75 miles away**
-

Types of Transportation

COMMERCIAL

1. **Local**
 - taxi
 - SuperShuttle
 - public transportation (bus, subway, local rail and ferries)
2. **Airplane**
3. **Train**
4. **Bus**
 - Greyhound
 - Trailways
 - Megabus
 - Hampton Jitney
5. **Ship**
 - cruise ships
 - long-distance ferries
 - river cruises

RENTED

6. **Automobile, truck, van**
7. **Motorcycle, moped**
8. **Private plane**
9. **Boat, trailer**
10. **Camper**
11. **Other vehicles**

PRIVATE

12. **Automobiles or other vehicles privately owned or leased by household**
13. **Vehicle owned by someone else**
14. **Other transport**

Fees to Play Sports, Exercise, or Rent Sports Equipment

- Boating
- Golf
- Fishing
- Swimming
- Tennis
- Skiing/snowboarding
- Bowling
- Exercise classes
- Scuba/snorkeling
- Bikesharing
- Other sports

Entertainment or Admissions

- Movies
- Theater
- Concerts
- Museums
- Tours
- Sports events
- Other entertainment events

SECTION 19 – MISCELLANEOUS EXPENSES

Part A – Miscellaneous Expenses

1. Fresh flowers or potted plants

2. Professional photography

3. Services of lawyers or other legal professionals, including –

will	arbitration services	civil litigation, including lawsuits, bankruptcies, etc.
divorce	estate settlement	criminal litigation
contracts	mediation	bail bonds

Do not include fees for business purposes or for real estate closing costs.

4. Accounting fees, including –

estate management	trust management	income tax preparation
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Do not include fees for business purposes.

5. Occupational expenses, such as union dues or professional licenses

6. Gardening or lawn care services, including –

fertilizing	lawn cutting	plowing	tree pruning
hedge trimming	planting	tilling	tree removal

Include any services provided under service contracts.

Do not include services covered by management or maintenance fees.

7. Housekeeping services, including –

cleaning	laundrying	cooking	window washing
carpet cleaning			

8. Home security system service fees

9. Other home services or small repair jobs around the house, not previously reported

snow removal	diaper service	pool maintenance
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10. Moving, storage, or freight, including –

moving companies	mini-warehouses	self-storage units	cargo shipping
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Do not include expenses reimbursed by an employer or other persons outside of the household.

11. Stamp or coin collecting, including –

stamp albums	coin albums	first day covers
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Do not include postage.

12. Lotteries or games of chance

13. Babysitting, nanny services, or other child care inside or outside your home

Do not include nursery school care or care in a day care center.

14. Toys or games, including –

trains	dart board	action figures	games
infant toys	stuffed animals	dolls	trucks

15. Arts or crafts kits, including –

model kits	rug kits	needlepoint kits	scrapbook supplies
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16. Sewing, knitting, or quilting materials and items, including –

beads	felt	needles	sewing kit
buttons	fiberfill	patterns	sequins
crochet hooks	Interfacing	quilt pad	stuffing
embroidery hoops	knitting equipment	rug material	thread/yarn
fabric	measuring tapes	seam binding	zipper

17. Purchase of pets, pet supplies, or medicine for pets, including –

aquarium	tropical fish	dog house	collars
hamster cage	pet toys	bird cage	dog
guinea pig	cat	bird	hamster
gerbil			

Do not include pet food.

18. Pet services, including –

grooming	kennels	license	pet daycare
pet resorts	dog walking	training	

19. Veterinarian expenses for pets, including –

vet visits	surgery	vaccinations	veterinary treatment
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20. Catering, for –

bridal showers	parties	Bar/Bat Mitzvahs	quinceañeras
weddings	graduations	anniversaries	confirmations

21. Arrangement of live entertainment for special occasions

22. Rental of party supplies

23. Purchase or upkeep of cemetery lots or vaults

24. Funerals, burials, or cremation, including –

burial fees	flowers for funeral	funeral transcript	limousines (used during
burial plans	headstones	musician honoraria	funeral)
clergy	footstones		

Part B – Contributions

GIVEN ANY MONEY BY CASH, CHECKS, OR GIVEN ANY GIFT CARDS TO –

1. College students living away from home

Money to pay for tuition, room, board, books, fees, transportation, clothing, and entertainment expenses

2. Any other people not in your household, such as –

friends	co-workers	homeless persons
street musicians	birthday money	wedding money
cash gifts at the office	money to assist others	

PAID ANY OF THE FOLLOWING –

3. Child support

4. Alimony

GIVEN ANY MONEY BY CASH, CHECKS, MONEY ORDERS, OR CREDIT CARDS TO BENEFIT –

5. Educational institutions, including –

alumni funds	educational endowments	parochial schools
scholarship funds	school fund raisers	

6. Political organizations, including –

political parties	political candidates	Political Action Committees (PACs)
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7. Religious organizations, including churches, temples, and mosques, including –

tithes and offerings	religious fund raisers
building funds	religious television/radio ministries

8. Charities or other organizations, including –

Red Cross	civic organizations	American Cancer Society
fine arts and literary	United Way	American Heart Association
Humane Society		

GIVEN ANY STOCKS, BONDS, OR MUTUAL FUNDS

9. Stocks, bonds, mutual funds

Include only funds given to persons or organizations outside of your household

SECTION 20 – EXPENSE PATTERNS FOR SELECTED SERVICES AND GOODS

Grocery shopping

Restaurants, fast food places, cafeterias, carryouts, or other such places

Cigarettes

Other tobacco products

cigars pipe tobacco chewing tobacco

Alcohol, including beer and wine

Meals at school for preschool through high school

Self-service laundry machines

clothing quilts linens
coats rugs drapes

Dry cleaning or laundry service

clothing quilts linens
coats rugs drapes

Haircutting, styling, attached hair pieces, manicures, massages and other salon services

hair coloring pedicures facials
waxing tanning salons hair weaves

Removable hairpieces, wigs, or toupees

temporary hair extensions

Safe deposit box rental in a bank or similar financial institution

Charges or fees for bank services such as ATM or overdraft fees or account service charges from a bank or similar financial institution –

ATM fees check order fee overdraft fee
certified check fee money order fee online banking and bill payment fee
check cashing fee regular service below minimum balance fee
charges

fees for personal loans, except those for real estate
management fees for trust, custodial or escrow accounts

Taxi or limousine service

Including Super Shuttle

Mass transportation services such as a bus, subway, mini-bus, or train

Include commuter services not covered by an employer

SECTION 21 – OCCUPATIONS

1. Administrator, Manager

administrator manager funeral director

2. Teacher

teacher guidance counselor

3. Professional

registered nurse accountant physician social worker computer systems
lawyer engineer clergy photographer analyst

4. Administrative Support, including Clerical

secretary bookkeeper clerk receptionist computer assistant

5. Sales, Retail

cashier commodity salesperson door-to-door salesperson
apparel salesperson motor vehicle salesperson

6. Sales, Business Goods and Services

mining sales representative real estate salesperson financial services
manufacturing sales representative wholesale sales representative insurance
salesperson

7. Technician

health technician practical nurse drafting clinical laboratory technician
electronic technician

8. Protective Service

private guard police officer firefighter

9. Private Household Service

nanny household worker

10. Other Service (except private household)

janitor child care worker waiter/waitress food preparer food counter/
cook hairstylist maid/houseman orderly fountain worker

11. Machine or Transportation Operator, Laborer

truck driver assembler tractor operator taxi driver construction laborer
bus driver packager machine operator inspector material handler
freight handler stock handler

12. Construction Workers, Mechanics

automobile mechanic machine repairer machinist meat cutter
carpenter electrician painter plumber
sheet metal worker mining worker

13. Farming

farmer farm worker

14. Forestry, Fishing, Groundskeeping

forestry worker fisher groundskeeper animal caretaker

15. Armed Forces

CARD A

- 0. Loss
- 1. \$ 0 – \$ 4,999
- 2. \$ 5,000 – \$ 9,999
- 3. \$ 10,000 – \$ 14,999
- 4. \$ 15,000 – \$ 19,999
- 5. \$ 20,000 – \$ 29,999
- 6. \$ 30,000 – \$ 39,999
- 7. \$ 40,000 – \$ 49,999
- 8. \$ 50,000 – \$ 69,999
- 9. \$ 70,000 – \$ 89,999
- 10. \$ 90,000 – \$ 119,999
- 11. \$ 120,000 and over

CARD B

1. Less than \$500
2. \$ 500 – \$ 699
3. \$ 700 – \$ 999
4. \$ 1,000 – \$ 1,299
5. \$ 1,300 – \$ 1,699
6. \$ 1,700 and over

CARD C

- 0. Loss
- 1. \$ 0 — \$ 999
- 2. \$ 1,000 — \$ 1,999
- 3. \$ 2,000 — \$ 2,999
- 4. \$ 3,000 — \$ 3,999
- 5. \$ 4,000 — \$ 4,999
- 6. \$ 5,000 — \$ 9,999
- 7. \$ 10,000 — \$ 14,999
- 8. \$ 15,000 — \$ 19,999
- 9. \$ 20,000 — \$ 29,999
- 10. \$ 30,000 — \$ 39,999
- 11. \$ 40,000 — \$ 49,999
- 12. \$ 50,000 and over

CARD D

1. \$ 0 – \$ 1,999
2. \$ 2,000 – \$ 9,999
3. \$ 10,000 – \$ 49,999
4. \$ 50,000 – \$ 199,999
5. \$ 200,000 – \$ 449,999
6. \$ 450,000 and over

CARD E

1. \$ 0 – \$ 499
2. \$ 500 – \$ 999
3. \$ 1,000 – \$ 2,499
4. \$ 2,500 – \$ 9,999
5. \$ 10,000 – \$ 34,999
6. \$ 35,000 and over

2015 CALENDAR

JANUARY						
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FEBRUARY						
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MARCH						
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APRIL						
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MAY						
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JUNE						
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JULY						
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SEPTEMBER						
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OCTOBER						
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NOVEMBER						
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DECEMBER						
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2016 CALENDAR

JANUARY

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31						

FEBRUARY

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MARCH

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APRIL

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MAY

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JUNE

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JULY

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24	25	26	27	28	29	30
31						

AUGUST

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

SEPTEMBER

S	M	T	W	T	F	S
					1	2
					3	
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

OCTOBER

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

NOVEMBER

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

DECEMBER

S	M	T	W	T	F	S
					1	2
					3	
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Fractions to Percentages

Fraction	%	Fraction	%	Fraction	%
1/2	50.00	1/7	14.29	3/9	33.33
1/3	33.33	2/7	28.57	4/9	44.44
2/3	66.67	3/7	42.86	5/9	55.55
1/4	25.00	4/7	57.14	6/9	66.67
2/4	50.00	5/7	71.42	7/9	77.78
3/4	75.00	6/7	85.71	8/9	88.89
1/5	20.00	1/8	12.50	1/10	10.00
2/5	40.00	2/8	25.00	2/10	20.00
3/5	60.00	3/8	37.50	3/10	30.00
4/5	80.00	4/8	50.00	4/10	40.00
1/6	16.67	5/8	62.50	5/10	50.00
2/6	33.33	6/8	75.00	6/10	60.00
3/6	50.00	7/8	87.50	7/10	70.00
4/6	66.67	1/9	11.11	8/10	80.00
5/6	83.33	2/9	22.22	9/10	90.00

U.S. Department of Commerce
Economics and Statistics Administration
U.S. Census Bureau