Variable Name	MR Screen	Question text/description	Code list	Text Fill Logic
LFINTRO1	Name LFINTRO1	Now I have some questions about (PREVIOUS YEAR) income and other financial resources for [you/(SP)] [and (your/his/her) (wife/husband/partner)]. 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 will not be affected in any way by your answers to these questions. GIVE BROCHURE TO RESPONDENT. ALLOW A FEW MINUTES FOR RESPONDENT TO REVIEW BROCHURE IF NECESSARY.	(01) CONTINUE (-7) Empty	[you] responde [(SP)] responde [(SP)] responde HHFLAG^=1) [and your hush male (ROSTESE (ROSTSEX=1), [ [and your wife (ROSTSEX=2)] (ROSTSEX=2), [ [and your part is proxy (SPPRe [and his husba HHFLAG=1), SP [and his wife] the HHFLAG=1), SP [and his partne HHFLAG=1), SP [and her husba HHFLAG=1), SP [and her wife] HHFLAG=1), SP [and her wife] HHFLAG=1), SP [and her partne HHFLAG=1), SP
	BOX LFINTRO1	If SPAISTATUS = 3 (Deceased in Community) or 4 (Deceased in Institutition), go to IAQ50 - TOTAL_COMBINED1.		[your] respond
LFINTRO2	LFINTRO2	of questions about [your/(SP's)/you and your (wife's/husband's/partner's)/(SP) and (his/her) (wife's/husband's/partner's)] income and other financial resources. First, I will ask whether [you/(SP)/you and your (wife/husband/partner)/(SP) and (his/her) (wife/husband/partner)] had particular types of income or other resources. All these questions can be answered with a "yes" or a "no." Then, I will ask you to estimate [your/(SP's)/their] total income. [Please answer all questions for [you and your (wife/husband/partner)/(SP) and (his/her) (wife/husband/partner)]. Please feel free to refer to any records or other persons who may be of assistance to you.	(01) CONTINUE (-7) Empty	[your] responde [his] responde [her] responde [vour] responde [(SP)'s] respond HHFLAG^=1) [you and your female (ROSTE female (ROSTE female (ROSTS) [you and your is male (ROSTS) [you and your (respondent is (ROSTREL=56)) [(SP) and his w HHFLAG=1), SF [(SP) and his p (ROSTREL=56, [(SP) and his p (ROSTREL=56, [(SP) and her w HHFLAG=1), SF [(SP) and her w HHFLAG=1), SF
WORKWEEK	LF1	Did [you/(SP)] do any work for pay in the last week? By the last week, I mean the week beginning on Sunday [MONTH, DAY OF SUNDAY PRIOR TO TODAY/MONTH, DAY OF SUNDAY PRIOR TO THE SATURDAY BEFORE TODAY'S DATE] and ending [today/on Saturday (MONTH, DAY OF SATURDAY PRIOR TO TODAY'S DATE)]?	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED	[you] responde [(SP)] respond [beginning on [on Sunday (M [today] TODAN [on Saturday (

ident is SP (SPPROXY=1), SP does not have a spouse who is alive and living in the household (ROSTREL^=2, or ROSTREL=2 and HHFLAG^=1) indent is proxy (SPPROXY=2), SP does not have a spouse who is alive and living in the household (ROSTREL^=2, or ROSTREL=2 and

isband] (respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is (SEX=1)) or (respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP is male ), proxy is SP's spouse (ROSTREL=2))

fe] (respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is female 2)) or (respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP is female ), proxy is SP's spouse (ROSTREL=2))

ertner] (respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1)) or (respondent PROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is SP's partner (ROSTREL=56)) band] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP has a spouse who is alive and living in the household (ROSTREL=2, SP's spouse is male (ROSTSEX=1), proxy is not SP's spouse (ROSTREL^2)

e] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP has a spouse who is alive and living in the household (ROSTREL=2, SP's spouse is female (ROSTSEX=2), proxy is not SP's spouse (ROSTREL^=2)

ner] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP has a partner who is alive and living in the household (ROSTREL=56, proxy is not SP's partner (ROSTREL^=56)

band] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP has a spouse who is alive and living in the household (ROSTREL=2, SP's spouse is male (ROSTSEX=1), proxy is not SP's spouse (ROSTREL^=2)

e] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP has a spouse who is alive and living in the household (ROSTREL=2, SP's spouse is female (ROSTSEX=2), proxy is not SP's spouse (ROSTREL^=2)

tner] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP has a partner who is alive and living in the household (ROSTREL=56, proxy is not SP's partner (ROSTREL^=56)

ndent is SP (SPPROXY=1)

### ndent is SP (SPPROXY=1)

dent is proxy (SPPROXY=2), SP male (ROSTSEX=1) dent is proxy (SPPROXY=2), SP female (ROSTSEX=2)

ndent is SP (SPPROXY=1), SP does not have a spouse who is alive and living in the household (ROSTREL^=2, or ROSTREL=2 and HHFLAG^=1) ondent is proxy (SPPROXY=2), SP does not have a spouse who is alive and living in the household (ROSTREL^=2, or ROSTREL=2 and

ur wife's] (respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is TESEX=2)) or (respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP is TSEX=2), proxy is SP's spouse (ROSTREL=2))

ur husband's] (respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse TESEX=1)) or (respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP is iEX=1), proxy is SP's spouse (ROSTREL=2))

ir partner's] (respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1)) or is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is SP's partner 5))

wife's] respondent is proxy (SPPROXY=2), SP male (ROSTSEX=1), SP has spouse who is alive and living in the household (ROSTREL=2, SP's spouse is female (ROSTSEX=2), proxy is not SP's spouse (ROSTREL^=2)

husband's] respondent is proxy (SPPROXY=2), SP male (ROSTSEX=1), SP has spouse who is alive and living in the household (ROSTREL=2, SP's spouse is male (ROSTSEX=1), proxy is not SP's spouse (ROSTREL^=2)

partner's] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP has a partner who is alive and living in the household 6, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56)

r wife's] respondent is proxy (SPPROXY=2), SP female (ROSTSEX=2), SP has spouse who is alive and living in the household (ROSTREL=2, SP's spouse is female (ROSTSEX=2), proxy is not SP's spouse (ROSTREL=2)

r husband's] respondent is proxy (SPPROXY=2), SP female (ROSTSEX=2), SP has spouse who is alive and living in the household (ROSTREL=2, SP's spouse is male (ROSTSEX=1), proxy is not SP's spouse (ROSTREL^=2)

dent is SP (SPPROXY=1) dent is proxy (SPPROXY=2)

n Sunday (MONTH, DAY OF SUNDAY PRIOR TO INTERVIEW)] TODAY'S date is a Saturday MONTH, DAY OF SUNDAY PRIOR TO THE SATURDAY BEFORE TODAY'S DATE)] TODAY'S date is not a Saturday

AY'S date is a Saturday

(MONTH, DAY OF SATURDAY PRIor TO TODAY'S DATE)] TODAY'S date is not a Saturday

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
RETNEVWK	LF1B	Is this because [you were/(SP) was] retired or [you/(SP)] never worked?	(03) NO, NEITHER OF THESE IS TRUE	[you were] respon [(SP) was] respon [you] respondent [(SP)] respondent
IAABSENT	LF2	[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?	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED	[Do you] respond [Does (SP)] respon [you were] respon [he was] respond [she was] respond
WORKMONTH	LF3	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?	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED	[you] respondent [(SP)] respondent
MULTIJOB	LF4	Last week, did [you/(SP)] have more than one job, including part-time, evening, or weekend work?	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED	[you] respondent [(SP)] respondent
HOURSPERWEEK	LF5	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.]	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[do you] responde [does (SP)] respor
		ENTER NUMBER OF HOURS USUALLY WORK IF NUMBER OF HOURS VARY EACH WEEK, ENTER 997		[your] respondent [his] respondent i [her] respondent
				[main job] LF4=1/ [job] LF4^=1/YES [By main job, I me [By main job, I me [By main job, I me
	BOX LF1	If LF2=1 (YES, ABSENT LAST WEEK), go to LF7. Otherwise, go to LF6.		
HOURSLASTWEEK1	LF6	How many hours did [you/(SP)] work last week?	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] respondent [(SP)] respondent
HOURSLASTWEEK2	LF7	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?	(1) [continuous response]	[you were] respor [(SP) was] respon
		ENTER NUMBER OF HOURS		[you] respondent [he] respondent is [she] respondent
				[you were] respor [he was] responde [she was] responde
PAYSCHEDULE	LF8	[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?	(3) TWO TIMES A MONTH	[Are you] LF4^=1, [Is (SP)] LF4^=1/Y [In your main job,
			(5) DAILY	[In (SP)'s main job [In (SP)'s main job
OSPAYSCHEDULE	LF8A	SPECIFY OTHER PAYMENT SCHEDULE	(1) [continuous response]	

espondent is SP (SPPROXY=1) spondent is proxy (SPPROXY=2)

dent is SP (SPPROXY=1) ident is proxy (SPPROXY=2)

oondent is SP (SPPROXY=1) espondent is proxy (SPPROXY=2)

espondent is SP (SPPROXY=1) condent is proxy (SPPROXY=2), SP is male (ROSTSEX=1) spondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2) dent is SP (SPPROXY=1) ident is proxy (SPPROXY=2)

dent is SP (SPPROXY=1) dent is proxy (SPPROXY=2)

oondent is SP (SPPROXY=1) espondent is proxy (SPPROXY=2)

ndent is SP (SPPROXY=1) lent is proxy (SPPROXY=2), SP is male (ROSTSEX=1) dent is proxy (SPPROXY=2), SP is female (ROSTSEX=2)

4=1/YES /YES

, I mean the job at which you work the most hours.] LF4=1/YES, respondent is SP (SPPROXY=1) , I mean the job at which he works the most hours.] LF4=1/YES, respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1) , I mean the job at which she works the most hours.] LF4=1/YES, respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2)

dent is SP (SPPROXY=1) Ident is proxy (SPPROXY=2)

espondent is SP (SPPROXY=1) spondent is proxy (SPPROXY=2)

dent is SP (SPPROXY=1) lent is proxy (SPPROXY=2), SP is male (ROSTSEX=1) dent is proxy (SPPROXY=2), SP is female (ROSTSEX=2)

espondent is SP (SPPROXY=1) condent is proxy (SPPROXY=2), SP is male (ROSTSEX=1) spondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2) 4^=1/YES, respondent is SP (SPPROXY=1) ^=1/YES, respondent is proxy (SPPROXY=2)

n job, are you] LF4=1/YES, respondent is SP (SPPROXY=1) in job, is he] LF4=1/YES, respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1) in job, is she] LF4=1/YES, respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2)

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
LASTPAYCHECK	LF9	How much was [your/(SP)'s] last paycheck before taxes and any other deductions [for (your/his/her) main job]?	(1) ENTER PAYCHECK AMOUNT (2) ENTER PAY PER HOUR	[your] respondent is SP (SPPROXY=1) [(SP)'s] respondent is proxy (SPPROXY=2)
		IF NEEDED: We don't need an exact dollar amount. An approximate amount is fine.	(3) ENTER PAY PER DAY (-8) DON'T KNOW	[for your main job] LF4=1/YES, respondent i [for his main job] LF4=1/YES, respondent is
		IF NEEDED: If it is easier, you can just tell me how much [you earn/(SP) earns] per hour or per day.	(-9) REFUSED	[for her main job] LF4=1/YES, respondent is
		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.		
PAYCHECKAMT	LF9A	ENTER PAYCHECK AMOUNT	(1) [continuous response]	
PAYCHECKHOURLY	LF9B	ENTER PAY PER HOUR	(1) [continuous response]	
PAYCHECKDAILY	LF9C	\$ ENTER PAY PER DAY	(1) [continuous response]	
MONTHPAY	LF10	\$ Now thinking about the month of [CURRENT MONTH -1 MONTH], how much did [you/(SP)] earn altogether from any work [you/he/she] did in [CURRENT MONTH -1 MONTH], before taxes and before any other deductions?	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1) [(SP)] respondent is proxy (SPPROXY=2) [you] respondent is SP (SPPROXY=1)
		IF NEEDED: We don't need an exact dollar amount. An approximate amount is fine. 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.		[he] respondent is proxy (SPPROXY=2), SP is [she] respondent is proxy (SPPROXY=2), SP i
		ENTER DOLLAR AMOUNT		
	BOX LF13	If ENS11 JOBSTAT = 1 of [ROSTREL = 2 (SPOUSE) or ROSTREL = 51 (PARTNER) for anyone- living in HH from ENS go to LF13. If the SP has a spouse or partner who is living in the household (ROSTREL=2 or 56, HHFLAG=1), go to LF13.         Otherwise, go to HO1.		
SPOUSEWORK	LF13	Did [you/(your/{SP}'s) (husband/wife/partner)] do any work for pay in the month of [CURRENT MONTH-1 MONTH]?	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED	[you] respondent is proxy (SPPROXY=2), pro [your husband] respondent is SP (SPPROXY= (ROSTSEX=1) [your wife] respondent is SP (SPPROXY=1), S (ROSTSEX=2) [your partner] respondent is SP (SPPROXY=2) [(SP)'s husband] respondent is proxy (SPPROXY=2) [(SP)'s husband] respondent is proxy (SPPROXY=2) [(SP)'s wife] respondent is proxy (SPPROXY=2), proxy is not SP's spouse or pa [(SP)'s partner] respondent is proxy (SPPROXY=2), proxy is not SP's spouse or pa [(SP)'s partner] respondent is proxy (SPPROXY=2), proxy is not SP's spouse or pa
SPOUSEEARN	LF14	<ul> <li>In [CURRENT MONTH -1 MONTH], how much altogether did [you/your/(SP)'s]</li> <li>[husband/wife/partner] earn before taxes and before any other deductions?</li> <li>IF NEEDED: We don't need an exact dollar amount. An approximate amount is fine.</li> <li>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.</li> <li>ENTER DOLLAR AMOUNT</li> <li>\$</li> </ul>	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	<ul> <li>[you] respondent is proxy (SPPROXY=2), pro</li> <li>[your husband] respondent is SP (SPPROXY=</li> <li>(ROSTSEX=1)</li> <li>[your wife] respondent is SP (SPPROXY=1), S</li> <li>(ROSTSEX=2)</li> <li>[your partner] respondent is SP (SPPROXY=2)</li> <li>[(SP)'s husband] respondent is proxy (SPPROXY=2)</li> <li>[(SP)'s husband] respondent is proxy (SPPROXY=2)</li> <li>[(SP)'s wife] respondent is proxy (SPPROXY=2), proxy is not SP's spouse or pa</li> <li>[(SP)'s partner] respondent is proxy (SPPROXY=2)</li> </ul>

in job] LF4=1/YES, respondent is SP (SPPROXY=1) job] LF4=1/YES, respondent is proxy (SPPROXY=1), SP is male (ROSTSEX=1) i job] LF4=1/YES, respondent is proxy (SPPROXY=1), SP is female (ROSSEX=2)

ndent is SP (SPPROXY=1) dent is proxy (SPPROXY=2), SP is male (ROSTSEX=1) ndent is proxy (SPPROXY=2), SP is female (ROSTSEX=2)

dent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) nd] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is male

espondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is female

r] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1)

ind] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is EX=1), proxy is not SP's spouse or partner (ROSTREL^=2 or 56))

respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is female , proxy is not SP's spouse or partner (ROSTREL^=2 or 56))

er] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's rtner (ROSTREL^=2 or 56)

dent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

nd] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is male

espondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is female

r] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1)

and] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is EX=1), proxy is not SP's spouse or partner (ROSTREL^=2 or 56))

respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is female , proxy is not SP's spouse or partner (ROSTREL^=2 or 56))

er] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's rtner (ROSTREL^=2 or 56))

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
IAOWNHOME	HO1	<ul> <li>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].</li> <li>[Do you/Does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(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?</li> </ul>	(1) OWN (2) RENT (OR PAY MONTHLY AMOUNT) (3) SOME OTHER ARRANGEMENT (-8) DON'T KNOW (-9) REFUSED	[home] HAQ-D [apartment or [Do you] respondent or 56 and HHF [Does (SP)] respondent ROSTREL=2 or [Do you or (SP HHFLAG=1) [Do you or (PA HHFLAG=1) [Do you or (SP [Does (SP) or ( HHFLAG=1), pr [Does (SP) or (
MORTGAGE	HO2	Is [your/(SP)'s] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)'s] mortgage paid off or are monthly mortgage payments still being made? IF NEEDED: Include any payments on a home equity loan or second mortgage.	(1) PAID OFF (2) STILL MAKE PAYMENTS (3) REVERSE MORTGAGE (-8) DON'T KNOW (-9) REFUSED	(ROSTREL=56, [your] respond 56 and HHFLAG [(SP)'s] respond ROSTREL=2 or [your or (SPOL HHFLAG=1), pr [your or (PART HHFLAG=1) [your or (SP FI [(SP)'s or (SPO HHFLAG=1), pr [(SP)'s or (PAR (ROSTREL=56,
MORTGAGE_AMT1	НОЗ	How much altogether is that each month?	(1) [continuous response] (-8) DON'T KNOW	
MORTGATE_AMT2	НОЗА	ENTER DOLLAR AMOUNT SHOW CARD IA1 Please look at this card and tell me which is closest. IF NEEDED: Include any payments on a home equity loan or second mortgage.	<ul> <li>(-9) REFUSED</li> <li>(1) LESS THAN \$250</li> <li>(2) \$250 TO LESS THAN \$500</li> <li>(3) \$500 TO LESS THAN</li> <li>\$1,000</li> <li>(4) \$1,000 TO LESS THAN</li> <li>\$3,000</li> <li>(5) \$3,000 TO LESS THAN</li> <li>\$5,000</li> <li>(6) \$5,000 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
MORTGAGELGNTH	HO3B	[Do you/Does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] expect to pay off the mortgage within 5 years, 10 years, or longer? IF NEEDED: Include any payments on a home equity loan or second mortgage.	(1) WITHIN 5 YEARS (2) WITHIN 10 YEARS (3) LONGER THAN 10 YEARS (-8) DON'T KNOW (-9) REFUSED	[Do you] response or 56 and HHF [Does (SP)] res ROSTREL=2 or [Do you or (SP HHFLAG=1) [Do you or (PA HHFLAG=1) [Do you or (SP [Does (SP) or ( HHFLAG=1), pr [Does (SP) or ( (ROSTREL=56,

## с

-Dwelling in(1,2,4,5,91,96,-8,-9) or condo] HAQ-Dwelling in(3,6)

- pondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 IFLAG^=1)
- espondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or or 56 and HHFLAG^=1)
- POUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2,
- PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56,
- P FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)
- (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, proxy is not SP's spouse (ROSTREL^=2)
- r (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household 5, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56)
- ndent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or AG^=1)
- ondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or or 56 and HHFLAG^=1)
- DUSE FIRSTNAME LASTNAME)'s] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, proxy is not SP's partner (ROSTREL^=2)
- RTNER FIRSTNAME LASTNAME)'s] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56,
- FIRSTNAME LASTNAME)'s] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) POUSE FIRSTNAME LASTNAME)'s] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, proxy is not SP's spouse (ROSTREL^=2)
- ARTNER FIRSTNAME LASTNAME)'s] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household 6, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56)

- pondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 IFLAG^=1)
- respondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or or 56 and HHFLAG^=1)
- SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2,
- PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56,
- SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)
- r (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, proxy is not SP's spouse (ROSTREL^=2)
- r (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household 5, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56)

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
MORTGAGEOWE1	HO3C	About how much [do you/does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] still owe on the mortgage? IF NEEDED: The nearest \$10,000 is fine. 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 NEEDED: Include any payments on a home equity loan or second mortgage. ENTER DOLLAR AMOUNT	(-8) DON'T KNOW (-9) REFUSED	[do you] respo or 56 and HHF [does (SP)] res ROSTREL=2 or [do you or (SP0 HHFLAG=1) [do you or (PA HHFLAG=1) [do you or (SP [does (SP) or (SP)] [does (SP) or (SP)] [does (SP) or (SP)]
MORTGAGEOWE2	HO3D	Is the amount owed	<ul> <li>(1) less than \$50,000,</li> <li>(2) \$50,000 to less than</li> <li>\$100,000, or</li> <li>(3) \$100,000 or more?</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	(ROSTREL=56,
PRESENTVALUE1	HO4	<ul> <li>What is the present value of this [home/apartment or condo]? I mean, about what would it bring if it was sold today, not counting any loans or outstanding mortgages?</li> <li>IF NEEDED: Your best guess or the nearest \$10,000 is fine.</li> <li>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.</li> <li>ENTER DOLLAR AMOUNT</li> </ul>	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[home] HAQ-D [apartment or
PRESENTVALUE2	HO4A	SHOW CARD IA2 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$50,000</li> <li>(2) \$50,000 TO LESS THAN</li> <li>\$75,000</li> <li>(3) \$75,000 TO LESS THAN</li> <li>\$100,000</li> <li>(4) \$100,000 TO LESS THAN</li> <li>\$200,000</li> <li>(5) \$200,000 TO LESS THAN</li> <li>\$200,000</li> <li>(5) \$200,000 TO LESS THAN</li> <li>\$300,000</li> <li>(6) \$300,000 TO LESS THAN</li> <li>\$500,000</li> <li>(7) \$500,000 TO LESS THAN</li> <li>\$750,000</li> <li>(8) \$750,000 OF MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
PAYRENT	HO5	[Do you/Does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] pay rent to live here?	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED	[Do you] response or 56 and HHF [Does (SP)] res ROSTREL=2 or [Do you or (SP HHFLAG=1) [Do you or (PA HHFLAG=1) [do you or (SP [Does (SP) or ( HHFLAG=1), pr [Does (SP) or ( (ROSTREL=56
RENTAMT1	HO6	How much is that each month? ENTER DOLLAR AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	(ROSTREL=56,

bondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 IFLAG^=1)

espondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or or 56 and HHFLAG^=1)

POUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2,

PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56,

P FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

(SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household HHFLAG=1), proxy is not SP's spouse (ROSTREL^=2)

(PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household 6, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56)

-Dwelling in(1,2,4,5,91,96,-8,-9) or condo] HAQ-Dwelling in(3,6)

pondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 +FLAG^=1)

respondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or 56 and HHFLAG^=1)

SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2,

PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56,

P FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

r (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, proxy is not SP's spouse (ROSTREL^=2)

r (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household 5, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56)

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
RENTAMT2	HO6A	SHOW CARD IA3 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$250</li> <li>(2) \$250 TO LESS THAN \$500</li> <li>(3) \$500 TO LESS THAN</li> <li>\$1,000</li> <li>(4) \$1,000 TO LESS THAN</li> <li>\$3,000</li> <li>(5) \$3,000 TO LESS THAN</li> <li>\$5,000</li> <li>(6) \$5,000 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
	BOX HO1	If HO6>=\$750 or HO6A=4 (\$1,000 TO LESS THAN \$3,000), 5 (\$3,000 TO LESS THAN \$5,000), OR 6 (\$5,000 OR MORE) go to IAQINTRO1. Otherwise, go to HO7.		
SECTION8	HO7	Is this home in Section 8 or public housing or housing for low-income seniors?	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED	
IAQINTRO1	IAQINTRO1	<ul> <li>We are interested in how people are getting along financially these days. The next few questions are about income and other resources. Your responses can help us understand how people manage financially as they age.</li> <li>Please feel free to refer to any records or other persons that may be of assistance in answering these questions.</li> <li>Many of these questions ask about "last month." By last month, I mean in [CURRENT MONTH – 1].</li> </ul>		
SSRR_LASTMONTH	IAQ1	Did [you/(SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive Social Security retirement and/or Railroad Retirement payments <u>in the last month,</u> that is in [CURRENT MONTH –1]? IF NEEDED: 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. [SELECT ALL THAT APPLY]	(2) YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM	[you] responde 56 and HHFLAG [(SP)] responde or 56 and HHFI [you or (SPOUS HHFLAG=1) [you or (PARTN HHFLAG=1) [you or (SP FIR [(SP) or (SPOUS HHFLAG=1), pr [(SP) or (PARTN HHFLAG=1), pr Display "SELEC who is alive an Display "in the
SSDEPOSIT	BOX IAQ1 IAQ2	IF IAQ1 NE (1) SP PAYMENT THEN GO TO IAQ4, ELSE GO TO IAQ2 [Do you/Does (SP)] get payments by direct deposit, on a prepaid card, or by mail?	(1) MAIL (2) DIRECT DEPOSIT (3) PREPAID CARD (-8) DON'T KNOW (-9) REFUSED	[Do you] respo [Does (SP)] res
MMSTARTSS	IAQ3	What month and year did [you/(SP)] start receiving Social Security? ENTER MONTH	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] responde [(SP)] responde
YYSTARTSS	IAQ3	What month and year did [you/(SP)] start receiving Social Security? ENTER YEAR	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] responde [(SP)] responde

ident is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or AG^=1)

ndent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 HFLAG^=1)

USE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2,

TNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56,

IRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

USE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, proxy is not SP's spouse (ROSTREL^=2)

RTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, proxy is not SP's partner (ROSTREL^=56)

ECT ALL THAT APPLY" and response option 2 ("YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE") if SP has a spouse or partner and living in the household (ROSTREL=2 or 56, HHFLAG=1). Else do not display.

ne last month" in underlined text.

pondent is SP (SPPROXY=1) respondent is proxy (SPPROXY=2)

dent is SP (SPPROXY=1) ident is proxy (SPPROXY=2)

ndent is SP (SPPROXY=1) ndent is proxy (SPPROXY=2)

Variable Name	MR Screen	Question text/description	Code list	Text Fill Logic
SSI_LASTMONTH	Name IAQ4	Did [you/(SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive Supplemental Security Income, which is also called SSI, <u>last month</u> ? IF NEEDED: These are monthly government payments to lower-income people in need. [SELECT ALL THAT APPLY]	(1) YES, SP RECEIVED PAYMENT FROM SOURCE (2) YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE (3) NO PAYMENT RECEIVED FROM THIS SOURCE (-8) DON'T KNOW (-9) REFUSED	[you] responde 56 and HHFLAG [(SP)] responde or 56 and HHFLAG [you or (SPOUS HHFLAG=1) [you or (PARTN HHFLAG=1) [you or (SP FIR [(SP) or (SPOUS HHFLAG=1), pr [(SP) or (PARTN HHFLAG=1), pr Display "SELEC who is alive an
VA_LASTMONTH	IAQ5	Did [you/(SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive any payments from the Veteran's Administration, <u>last month</u> related to military service or veteran survivor's benefits? [IF NEEDED: The Veteran's Administration is also known as the U.S. Department of Veterans Affairs.] [SELECT ALL THAT APPLY]	(1) YES, SP RECEIVED PAYMENT FROM SOURCE (2) YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE (3) NO PAYMENT RECEIVED FROM THIS SOURCE (-8) DON'T KNOW (-9) REFUSED	Display "in the [you] responde 56 and HHFLAG [(SP)] responde or 56 and HHFLAG [you or (SPOUS HHFLAG=1) [you or (PARTN HHFLAG=1) [you or (SP FIR [(SP) or (SPOUS HHFLAG=1), pr [(SP) or (PARTN HHFLAG=1), pr Display "SELEC who is alive an
PENSION_LASTMONTH	IAQ6	People sometimes have other retirement income. This may be from pensions or retirement plans related to their jobs.         [Do you/Does (SP)] [or (SP FIRSTNAME LASTNAME/SPOUSE FIRSTNAME LASTNAME/PARTNER FIRSTNAME LASTNAME)] have any pension plans that were a job-related or union benefit?         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.         [SELECT ALL THAT APPLY]	<ul> <li>(1) YES, SP HAS PENTION</li> <li>(2) YES, SPOUSE/PARTNER</li> <li>HAS PENSION</li> <li>(3) NO PENSIONS</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	Display "last m [Do you] respondent or 56 and HHF [Does (SP)] respondent ROSTREL=2 or [Do you or (SP HHFLAG=1) [Do you or (PA HHFLAG=1) [do you or (SP [Does (SP) or (SP (ROSTREL=56, Display "SELEC who is alive an

dent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or AG^=1)

ident is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 IFLAG^=1)

USE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2,

TNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56,

IRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

USE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, proxy is not SP's spouse (ROSTREL^=2)

TNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, proxy is not SP's partner (ROSTREL^=56)

ECT ALL THAT APPLY" and response option 2 ("YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE") if SP has a spouse or partner and living in the household (ROSTREL=2 or 56, HHFLAG=1). Else do not display.

ne last month" in underlined text.

dent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or AG^=1)

ident is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 IFLAG^=1)

USE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2,

TNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56,

IRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

USE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, proxy is not SP's spouse (ROSTREL^=2)

TNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, proxy is not SP's partner (ROSTREL^=56)

ECT ALL THAT APPLY" and response option 2 ("YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE") if SP has a spouse or partner and living in the household (ROSTREL=2 or 56, HHFLAG=1). Else do not display.

month" in underlined text.

pondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 IFLAG^=1)

espondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or or 56 and HHFLAG^=1)

SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2,

PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56,

P FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) · (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2,

proxy is not SP's spouse (ROSTREL^=2)

(PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household 5, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56)

ECT ALL THAT APPLY" and response option 2 ("YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE") if SP has a spouse or partner and living in the household (ROSTREL=2 or 56, HHFLAG=1). Else do not display.

Variable Name	MR Screen	Question text/description	Code list	Text Fill Logic
401K_LASTMONTH	Name IAQ7	SHOW CARD IA4         Please look at the types of retirement plans on this card. [Do you/Does (SP)] [or (SP         FIRSTNAME LASTNAME/SPOUSE FIRSTNAME LASTNAME/PARTNER FIRSTNAME         LASTNAME)] have any of these?         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.         IF NEEDED: IRAs, also known as Individual Retirement Accounts, are a type of plan you set up on your own.         [SELECT ALL THAT APPLY]	<ul> <li>(1) YYES, SP HAS 401K, 403B,</li> <li>IRA, OR OTHER RETIREMENT</li> <li>PLANS</li> <li>(2) YES, SPOUSE/PARTNER</li> <li>HAS 401K, 403B, IRA, OR</li> <li>OTHER RETIREMENT PLANS</li> <li>(3) NO PLANS</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	[Do you] respo or 56 and HHFI [Does (SP)] res ROSTREL=2 or [Do you or (SP HHFLAG=1) [Do you or (PA HHFLAG=1) [do you or (SP [Does (SP) or (SP) [Does (SP) or (SP)] [Does (SP) or (SP)] [Does (SP) or (SP)]
MUTUALFUNDS	IAQ8	[(Not including the retirement accounts we have already talked about, {do you/does [SP]})/(Do you/Does {SP})] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] own any mutual funds or stocks? [SELECT ALL THAT APPLY]	(1) YES, SP HAS ASSET (2) YES, SPOUSE/PARTNER HAS ASSET (3) YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY (4) NO ASSET OF THIS TYPE (-8) DON'T KNOW (-9) REFUSED	Display "SELEC alive and living Not including t is SP (SPPROXY HHFLAG^=1) [Not including respondent is p and HHFLAG^= [Not including 2/SPOUSE RET [Not including 2/SPOUSE RET [Not including 2/SPOUSE RET [Not including 2/SPOUSE RET proxy is not SP [Not including 2/SPOUSE RET proxy is not SP [Do you] IA7^= alive and living [Does (SP)] IA7 is alive and living
BONDS	IAQ9	Not including what we've already talked about, [do you/does (SP)] [or (SP FIRSTNAME LASTNAME) (SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] own any bonds, such as Government Savings Bonds, corporate, municipal, or other types of bonds?         [SELECT ALL THAT APPLY]	<ul> <li>(1) YES, SP HAS ASSET</li> <li>(2) YES, SPOUSE/PARTNER</li> <li>HAS ASSET</li> <li>(3) YES, SP AND</li> <li>SPOUSE/PARTNER HAVE</li> <li>ASSET JOINTLY</li> <li>(4) NO ASSET OF THIS TYPE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	spouse who is [do you] respo or 56 and HHFI [does (SP)] resp ROSTREL=2 or [do you or (SPC HHFLAG=1) [do you or (PAI HHFLAG=1) [does (SP) or (SP [does (SP) or (SP [does (SP) or (SP (ROSTREL=56, SP)) Display "SELEC HAVE ASSET JC

- pondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 IFLAG^=1)
- espondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or 56 and HHFLAG^=1)
- SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2,
- PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56,
- SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)
- r (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, proxy is not SP's spouse (ROSTREL^=2)
- r (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household 5, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56)
- ECT ALL THAT APPLY" and response option 2 ("YES, SPOUSE/PARTNER HAS 401K, 403B, IRA, or KEOGH") if SP has a spouse or partner who is ng in the household (ROSTREL=2 or 56, HHFLAG=1). Else do not display.
- g the retirement accounts we have already talked about, do you] IA7=1/SP RETIREMENT ACCT or 2/SPOUSE RETIREMENT ACCT, respondent XY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and
- g the retirement accounts we have already talked about, does (SP)] IA7=1/SP RETIREMENT ACCT or 2/SPOUSE RETIREMENT ACCT, s proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 ^=1)
- ing the retirement accounts we have already talked about, do you or (SPOUSE FIRSTNAME LASTNAME)] IA7=1/SP RETIREMENT ACCT or ETIREMENT ACCT, respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1) and the retirement accounts we have already talked about, do you or (PARTNER FIRSTNAME LASTNAME)] IA7=1/SP RETIREMENT ACCT or ETIREMENT ACCT, respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) and the retirement accounts we have already talked about, do you or (SP FIRSTNAME LASTNAME)] IA7=1/SP RETIREMENT ACCT or 2/SPOUSE and the retirement accounts we have already talked about, do you or (SP FIRSTNAME LASTNAME)] IA7=1/SP RETIREMENT ACCT or 2/SPOUSE acct, SP has a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1), proxy is SP's spouse or partner or 56)
- ng the retirement accounts we have already talked about, does (SP) or (SPOUSE FIRSTNAME LASTNAME)] IA7=1/SP RETIREMENT ACCT or ETIREMENT ACCT, respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse (ROSTREL^=2)
- ng the retirement accounts we have already talked about, does (SP) or (PARTNER FIRSTNAME LASTNAME)] IA7=1/SP RETIREMENT ACCT or ETIREMENT ACCT, respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), SP's partner (ROSTREL^=56)
- ^=1/SP RETIREMENT ACCT or 2/SPOUSE RETIREMENT ACCT, respondent is SP (SPPROXY=1), SP does not have spouse or partner who is ng in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1)
- A7^=1/SP RETIREMENT ACCT or 2/SPOUSE RETIREMENT ACCT, respondent is proxy (SPPROXY=2), SP does not have spouse or partner who iving in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1)
- SPOUSE FIRSTNAME LASTNAME)] IA7^=1/SP RETIREMENT ACCT or 2/SPOUSE RETIREMENT ACCT, respondent is SP (SPPROXY=1), SP has a is alive and living in the household (ROSTREL=2, HHFLAG=1)
- pondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 IFLAG^=1)
- espondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or or 56 and HHFLAG^=1)
- POUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2,
- PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56,
- SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)
- r (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, proxy is not SP's spouse (ROSTREL^=2)
- r (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household 6, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56)
- ECT ALL THAT APPLY" and response option 2 ("YES, SPOUSE/PARTNER HAS ASSET") and response option 3 ("YES, SP AND SPOUSE/PARTNER JOINTLY") if SP has a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1). Else do not display.

Variable Name	MR Screen	Question text/description	Code list	Text Fill Logic
CHECKING	IAQ10	The next questions ask about different kinds of bank or savings accounts people sometimes have or property they own. Not counting what we've already talked about, [do you/does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] have A checking account?	<ul> <li>(1) YES, SP HAS ASSET</li> <li>(2) YES, SPOUSE/PARTNER</li> <li>HAS ASSET</li> <li>(3) YES, SP AND</li> <li>SPOUSE/PARTNER HAVE</li> <li>ASSET JOINTLY</li> <li>(4) NO ASSET OF THIS TYPE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	[do you] respo or 56 and HHF [does (SP)] res ROSTREL=2 or [do you or (SP0 HHFLAG=1) [do you or (PA HHFLAG=1) [do you or (SP [does (SP) or (SP [does (SP) or (SP)] [does (SP) or (SP)]
SAVINGS	IAQ11	[IF NEEDED: Not counting what we've already talked about, [do you/does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] have] A savings account or money market account?	<ul> <li>(1) YES, SP HAS ASSET</li> <li>(2) YES, SPOUSE/PARTNER</li> <li>HAS ASSET</li> <li>(3) YES, SP AND</li> <li>SPOUSE/PARTNER HAVE</li> <li>ASSET JOINTLY</li> <li>(4) NO ASSET OF THIS TYPE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	Display respon partner who is [do you] respon or 56 and HHF [does (SP)] res ROSTREL=2 or [do you or (SP HHFLAG=1) [do you or (PA HHFLAG=1) [do you or (SP [does (SP) or (3 HHFLAG=1), pr [does (SP) or (4 (ROSTREL=56, Display respon
CERTDEPOSIT	IAQ12	[IF NEEDED: Not counting what we've already talked about, [do you/does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] have] Certificates of deposit?	<ul> <li>(1) YES, SP HAS ASSET</li> <li>(2) YES, SPOUSE/PARTNER</li> <li>HAS ASSET</li> <li>(3) YES, SP AND</li> <li>SPOUSE/PARTNER HAVE</li> <li>ASSET JOINTLY</li> <li>(4) NO ASSET OF THIS TYPE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	partner who is [Do you] respon- or 56 and HHF [Does (SP)] res ROSTREL=2 or [Do you or (SP HHFLAG=1) [Do you or (PA HHFLAG=1) [do you or (SP [Does (SP) or ( HHFLAG=1), pr [Does (SP) or ( (ROSTREL=56, Display respon- partner who is

с

bondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 IFLAG^=1)

espondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or or 56 and HHFLAG^=1)

POUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2,

PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56,

P FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

(SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, proxy is not SP's spouse (ROSTREL^=2)

(PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household 6, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56)

onse option 2 ("YES, SPOUSE/PARTNER HAS ASSET") and 3 ("YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY") if SP has a spouse or is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1). Else do not display.

bondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 IFLAG^=1)

espondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or or 56 and HHFLAG^=1)

POUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2,

PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56,

P FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, proxy is not SP's spouse (ROSTREL^=2)

(PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household 5, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56)

onse option 2 ("YES, SPOUSE/PARTNER HAS ASSET") and 3 ("YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY") if SP has a spouse or is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1). Else do not display.

pondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 IFLAG^=1)

espondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or or 56 and HHFLAG^=1)

SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2,

PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56,

P FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

r (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, proxy is not SP's spouse (ROSTREL^=2)

r (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household 6, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56)

onse option 2 ("YES, SPOUSE/PARTNER HAS ASSET") and 3 ("YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY") if SP has a spouse or is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1). Else do not display.

Variable Name	MR Screen	Question text/description	Code list	Text Fill Logic
OTHER_LAND	Name IAQ13	[Do you/Does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] own a business, a farm, or any other real estate [besides (your/{SP}'s) home], including land or rental properties?           [SELECT ALL THAT APPLY]	<ul> <li>(1) YES, SP HAS ASSET</li> <li>(2) YES, SPOUSE/PARTNER</li> <li>HAS ASSET</li> <li>(3) YES, SP AND</li> <li>SPOUSE/PARTNER HAVE</li> <li>ASSET JOINTLY</li> <li>(4) NO ASSET OF THIS TYPE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	[Do you] response or 56 and HHF [Does (SP)] res ROSTREL=2 or [Do you or (SP HHFLAG=1) [Do you or (PA HHFLAG=1) [do you or (SP [Does (SP) or ( HHFLAG=1), pr [Does (SP) or ( (ROSTREL=56, Display "SELEC HAVE ASSET JC [besides your lage)
IAQINTRO2	IAQINTRO2	We now have a few questions about income which are important for understanding how people manage financially as they age.		
	BOX IAQ2	If IAQ1 = 1 (SP RECEIVED SS/RR) and 2 (SPOUSE RECEIVED SS/RR), go to IAQ14. Else if IA1 = 1 (SP RECEIVED SS/RR), go to IAQ15A. Else if IA1 = 2 (SPOUSE RECEIVED SS/RR), go to IAQ16A. Otherwise, go to BOX IAQ3.		
SSRR_COMBINED1	IAQ14	<ul> <li>First, what was the amount of [your/(SP)'s] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)]'s most recent monthly Social Security or Railroad Retirement payment (for the month of [CURRENT MONTH – 1])?</li> <li>IF NEEDED: We don't need an exact dollar amount.</li> <li>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.</li> </ul>	<ul> <li>(1) ENTER COMBINED</li> <li>AMOUNT</li> <li>(2) ENTER SP AND</li> <li>SPOUSE/PARTNER AMOUNTS</li> <li>SEPARATELY</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	[your] respond [(SP)'s] respond [(SPOUSE FIRS who is alive ar [(PARTNER FIR 56), SP has a p [(SP FIRSTNAN
SSRR_COMBINED2	IAQ14A	ENTER COMBINED SP AND SPOUSE/PARTNER SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	
SSRR_COMBINED3	IAQ14B	SHOW CARD IA5 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$1,300</li> <li>(2) \$1,300 TO LESS THAN</li> <li>\$1,700</li> <li>(3) \$1,700 TO LESS THAN</li> <li>\$2,200</li> <li>(3) \$2,200 TO LESS THAN</li> <li>\$2,600</li> <li>(5) \$2,600 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
SSRR_SP_AMT1	IAQ15A	What was the amount of [your/(SP)'s] most recent monthly Social Security or Railroad Retirement payment (for the month of [CURRENT MONTH – 1])? IF NEEDED: We don't need an exact dollar amount.	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[your] respond [(SP)'s] respor
		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.		
		ENTER SP SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT		

ogic
espondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 HHFLAG^=1)
] respondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or 2 or 56 and HHFLAG^=1)
(SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2,
(PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56,
, (SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)
or (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, .), proxy is not SP's spouse (ROSTREL^=2)
or (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household 56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56)
ELECT ALL THAT APPLY" and response option 2 ("YES, SPOUSE/PARTNER HAS ASSET") and response option 3 ("YES, SP AND SPOUSE/PARTNER ET JOINTLY") if SP has a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1). Else do not display.
our home] respondent is SP (SPPROXY=1), SP owns home (HP1=1)
SP)'s home] respondent is proxy (SPPROXY=2), SP owns home (HP1=1)

ndent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) ondent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56)

RSTNAME LASTNAME)] respondent is SP (SPPROXY=1) or respondent is proxy and proxy is not SP's spouse (ROSTREL^=56), SP has a spouse and living in the household (ROSTREL=2, HHFLAG=1)

IRSTNAME LASTNAME)] respondent is SP (SPPROXY=1) or or respondent is proxy and proxy is not SP's spouse or partner (ROSTREL^=2 or partner who is alive and living in the household (ROSTREL=56, HHFLAG=1)

AME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

ondent is SP (SPPROXY=1) ondent is proxy (SPPROXY=2)

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
SSRR_SP_AMT2	IAQ15B	SHOW CARD IA6	(1) LESS THAN \$700	
			(2) \$700 TO LESS THAN	
		Please look at this card and tell me which is closest.	\$1,000	
			(3) \$1,000 TO LESS THAN \$1,300	
			(4) \$1,300 TO LESS THAN	
			\$1,600	
			(5) \$1,600 OR MORE	
			(-8) DON'T KNOW	
			(-9) REFUSED	
	BOX IAQ2A	If IAQ14 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ16A. Otherwise, go to BOX IAQ3.		
		Otherwise, go to box IAQS.		
SSRR_SPOUSE_AMT1	IAQ16A	What was the amount of [your/(SPOUSE FIRSTNAME LASTNAME)'s/(PARTNER FIRSTNAME		[your] respond
		LASTNAME)'s] most recent monthly Social Security or Railroad Retirement payment (for the month of [CURRENT MONTH – 1])?	(-8) DON'T KNOW (-9) REFUSED	[(SPOUSE FIRS proxy is not SP
				[(PARTNER FIR
		IF NEEDED: We don't need an exact dollar amount.		proxy is not SP
		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.		
SSRR_SPOUSE_AMT2	IAQ16B	ENTER SPOUSE/PARTNER SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT SHOW CARD IA6	(1) LESS THAN \$700	
SSRIC_SI COSE_AMIZ	IAQIOD		(2) \$700 TO LESS THAN	
		Please look at this card and tell me which is closest.	\$1,000	
			(3) \$1,000 TO LESS THAN	
			\$1,300	
			(4) \$1,300 TO LESS THAN	
			\$1,600 (5) \$1,600 OR MORE	
			(-8) DON'T KNOW	
			(-9) REFUSED	
	BOX IAQ3	If IAQ4 = 1 (SP RECEIVED SSI) and 2 (SPOUSE RECEIVED SSI), go to IAQ17.		
		Else if $IAQ4 = 1$ (SP RECEIVED SSI), go to $IAQ18A$ .		
		Else if IAQ4 = 2 (SPOUSE RECEIVED SSI), go to IAQ19A. Otherwise, go to BOX IAQ4.		
SSRR_COMBINED1	IAQ17	What was the amount of [your/(SP)'s] and [(SP FIRSTNAME LASTNAME)/(SPOUSE	(1) ENTER COMBINED	[your] respond
		FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)]'s most recent monthly SSI	AMOUNT	[(SP)'s] respon
		payment (for the month of [CURRENT MONTH – 1])?	(2) ENTER SP AND	
			SPOUSE/PARTNER AMOUNTS	-
		IF NEEDED: We don't need an exact dollar amount.	SEPARATELY (-8) DON'T KNOW	[(SPOUSE FIRS is not SP's spou
		IF NEEDED: We know questions like these may be difficult to answer, but we need to know		[(PARTNER FIR
		this to understand how people manage financially as they age and what effect this might		proxy is not SP
		have on their health.		
SSRR_COMBINED2	IAQ17A	ENTER COMBINED SP AND SPOUSE/PARTNER SSI AMOUNT	(1) [continuous response]	
			(-8) DON'T KNOW	
SSRR_COMBINED3	IAQ17B	SHOW CARD IA7	(-9) REFUSED (1) LESS THAN \$300	
			(2) \$300 TO LESS THAN \$700	
		Please look at this card and tell me which is closest.	(3) \$700 TO LESS THAN	
			\$1,000	
			(4) \$1,000 OR MORE	
			(-8) DON'T KNOW	
			(-9) REFUSED	
	1	1	1	

ndent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

RSTNAME LASTNAME)'s] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then SP's spouse (ROSTREL^=2)

IRSTNAME LASTNAME)'s] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then SP's partner (ROSTREL^=56)

ndent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) ondent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56)

AME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

RSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy bouse (ROSTREL^=2)

IRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=256, HHFLAG=1), if respondent is proxy then SP's partner (ROSTREL^=56)

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
SSI_SP_AMT1	IAQ18A	<ul> <li>What was the amount of [your/(SP)'s] most recent monthly SSI payment (for the month of [CURRENT MONTH – 1])?</li> <li>IF NEEDED: We don't need an exact dollar amount.</li> <li>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.</li> </ul>	(-8) DON'T KNOW (-9) REFUSED	[your] respond [(SP)'s] respon
SSI_SP_AMT2	IAQ18B	ENTER SP SSI AMOUNT SHOW CARD IA8 Please look at this card and tell me which is closest.	(1) LESS THAN \$100 (2) \$100 TO LESS THAN \$200 (3) \$200 TO LESS THAN \$400 (4) \$400 TO LESS THAN \$700 (5) \$700 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ3A	If IAQ17 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ19A. Otherwise, go to BOX IAQ4.		
SSI_SPOUSE_AMT3	IAQ19A	<ul> <li>What was the amount of [your/(SPOUSE FIRSTNAME LASTNAME)'s/(PARTNER FIRSTNAME LASTNAME)'s] most recent monthly SSI payment (for the month of [CURRENT MONTH – 1])?</li> <li>IF NEEDED: We don't need an exact dollar amount.</li> <li>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.</li> </ul>	(-8) DON'T KNOW (-9) REFUSED	[your] respond [(SPOUSE FIRS is not SP's spo [(PARTNER FIF proxy is not SF
SSI SPOUSE AMT4	IAQ19B	ENTER SPOUSE/PARTNER SSI AMOUNT SHOW CARD IA8	(1) LESS THAN \$100	
331_3POUSE_AW114	IAQIJB	Please look at this card and tell me which is closest.	(2) \$100 TO LESS THAN \$200 (3) \$200 TO LESS THAN \$200 (4) \$400 TO LESS THAN \$400 (5) \$700 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ4	If IAQ5 = 1 (SP RECEIVED VA) and 2 (SPOUSE RECEIVED VA), go to IAQ20. Else if IAQ5 = 1 (SP RECEIVED VA), go to IA21A. Else if IAQ5 = 2 (SPOUSE RECEIVED VA), go to IAQ22A. Otherwise, go to BOX IAQ5.		
VA_AMT_COMBINED1	IAQ20	What was the amount of [your/(SP)'s] and [(SP FIRSTNAME LASTNAME)/(SPOUSE         FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)]'s most recent monthly         Veteran's Administration payment (for the month of [CURRENT MONTH – 1])?         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 people manage financially as they age and what effect this might have on their health.	(1) ENTER COMBINED AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED	[your] respond [(SP)'s] respond [(SP FIRSTNAN [(SPOUSE FIRS is not SP's par [(PARTNER FIR proxy is not SF
VA_AMT_COMBINED2	IAQ20A	ENTER COMBINED SP AND SPOUSE/PARTNER VA AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	

ondent is SP (SPPROXY=1) condent is proxy (SPPROXY=2)

ondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

IRSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy spouse (ROSTREL^=2)

FIRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then SP's partner (ROSTREL^=56)

ondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) condent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56)

IAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) IRSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy

artner (ROSTREL^=2)

FIRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then t SP's partner (ROSTREL^=56)

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
VA_AMT_COMBINED3	IAQ20B	SHOW CARD IA9 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$1,000</li> <li>(2) \$1,000 TO LESS THAN</li> <li>\$1,400</li> <li>(3) \$1,400 TO LESS THAN</li> <li>\$1,800</li> <li>(4) \$1,800 TO LESS THAN</li> <li>\$2,200</li> <li>(5) \$2,200 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(0) REFLICED</li> </ul>	
VA_SP_AMT1	IAQ21A	<ul> <li>What was the amount of [your/(SP)'s] most recent monthly Veteran's Administration payment (for the month of [CURRENT MONTH – 1])?</li> <li>IF NEEDED: We don't need an exact dollar amount.</li> <li>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.</li> <li>ENTER SP VA AMOUNT</li> </ul>	(-9) REFUSED (1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[your] respond [(SP)'s] respon
VA_SP_AMT2	IAQ21B	SHOW CARD IA10 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$500</li> <li>(2) \$500 TO LESS THAN \$700</li> <li>(3) \$700 TO LESS THAN \$900</li> <li>(4) \$900 TO LESS THAN \$900</li> <li>(4) \$900 TO LESS THAN</li> <li>\$1,100</li> <li>(5) \$1,100 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
	BOX IAQ4A	If IAQ20 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ22A. Otherwise, go to BOX IAQ5.		
VA_SPOUSE_AMT1	IAQ22A	<ul> <li>What was the amount of [your/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)'s] most recent monthly Veteran's Administration payment (for the month of [CURRENT MONTH – 1])?</li> <li>IF NEEDED: We don't need an exact dollar amount.</li> <li>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.</li> <li>ENTER SPOUSE/PARTNER VA AMOUNT</li> </ul>		[your] respond [(SPOUSE FIRS is not SP's spond [(PARTNER FIR proxy is not SP
VA_SPOUSE_AMT2	IAQ22B	SHOW CARD IA10 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$500</li> <li>(2) \$500 TO LESS THAN \$700</li> <li>(3) \$700 TO LESS THAN \$900</li> <li>(4) \$900 TO LESS THAN</li> <li>\$1,100</li> <li>(5) \$1,100 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
	BOX IAQ5	If IAQ6 = 1 (SP RECEIVED PENSION PLAN) and 2 (SPOUSE RECEIVED PENSION PLAN), go to IAQ23. Else if IAQ6 = 1 (SP RECEIVED PENSION PLAN), go to IAQ24A. Else if IAQ6 = 2 (SPOUSE RECEIVED PENSION PLAN), go to IAQ25A. Otherwise, go to BOX IAQ6.		

ondent is SP (SPPROXY=1) ondent is proxy (SPPROXY=2)

ndent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

RSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy pouse (ROSTREL^=2)

IRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then SP's partner (ROSTREL^=56)

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
PENSION_COMBINED1	IAQ23	You told me earlier that [you/(SP)] and [({SP FIRSTNAME LASTNAME}/{SPOUSE FIRSTNAME LASTNAME}/{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])? 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 people manage financially as they age and what effect this might have on their health.	AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED	[you] respond [(SP)] respond [(SP FIRSTNAN [(SPOUSE FIRS is not SP's par [(PARTNER FIF proxy is not SF
PENSION_COMBINED2	IAQ23A	ENTER COMBINED SP AND SPOUSE/PARTNER PENSION PLAN AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	
PENSION_COMBINED3	IAQ23B	SHOW CARD IA11 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$600</li> <li>(2) \$600 TO LESS THAN</li> <li>\$1,300</li> <li>(3) \$1,300 TO LESS THAN</li> <li>\$2,100</li> <li>(4) \$2,100 TO LESS THAN</li> <li>\$5,900</li> <li>(5) \$5,900 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
PENSION_SP_AMT1	IAQ24A		(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[You told me e [You told me e [your job-rela [(SP)'s job-rela [this] IA23^=2
PENSION_SP_AMT2	IAQ24B	SHOW CARD IA12 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$400</li> <li>(2) \$400 TO LESS THAN \$900</li> <li>(3) \$900 TO LESS THAN</li> <li>\$1,600</li> <li>(4) \$1,600 TO LESS THAN</li> <li>\$3,800</li> <li>(5) \$3,800 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
	BOX IAQ5A	If IAQ23 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ25A. Otherwise, go to BOX IAQ6.		
PENSION_SPOUSE_AMT	IAQ25A	<ul> <li>[You told me earlier that (you have/{(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME) has}) a job-related pension plan.] In all, how much was received from [(your/{SPOUSE FIRSTNAME LASTNAME}'s/{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])?</li> <li>IF NEEDED: We don't need an exact dollar amount.</li> <li>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.</li> <li>ENTER SPOUSE/PARTNER PENSION PLAN AMOUNT</li> </ul>	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[You told me e or 56) [You told me e household (RC [You told me e household (RC [your job-relat [(SPOUSE FIRS respondent is [(PARTNER FIR respondent is [this] IA23^=2

ndent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) ndent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56)

ME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

RSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy artner (ROSTREL^=2)

IRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=256, HHFLAG=1), if respondent is proxy then SP's partner (ROSTREL^=56)

e earlier that you have a job-related pension plan.] IA23^=2, respondent is SP (SPPROXY=1) e earlier that (SP) has a job-related pension plan.] IA23^=2, respondent is proxy (SPPROXY=2)

lated] IA23=2, respondent is SP (SPPROXY=1) elated] IA23=2, respondent is proxy (SPPROXY=2) =2

e earlier that you have a job-related pension plan.] IA23<sup>2</sup>, respondent is proxy (SPPROXY=2), proxy is SP's partner or spouse (ROSTREL=2

e earlier that (SPOUSE FIRSTNAME LASTNAME) has a job-related pension plan.] IA23^=2, SP has a spouse who is alive and living in the ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) e earlier that (PARTNER FIRSTNAME LASTNAME) has a job-related pension plan.] IA23^=2, SP has a partner who is alive and living in the ROSTREL=56, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56)

ated] IA23=2, respondent is proxy (SPPROXY=2), proxy is SP's partner or spouse (ROSTREL=2 or 56) RSTNAME LASTNAME)'s job-related] IA23=2, SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if is proxy then proxy is not SP's spouse (ROSTREL^=2)

IRSTNAME LASTNAME)'s job-related] IA23=2, SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if is proxy then proxy is not SP's partner (ROSTREL^=56)

2

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
PENSION_SPOUSE_AMT 2		SHOW CARD IA12 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$400</li> <li>(2) \$400 TO LESS THAN \$900</li> <li>(3) \$900 TO LESS THAN</li> <li>\$1,600</li> <li>(4) \$1,600 TO LESS THAN</li> <li>\$3,800</li> <li>(5) \$3,800 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
	BOX IAQ6	If IAQ7 = 1 (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IAQ26. Else if IAQ7 = 1 (SP HAS RETIREMENT ACCT), go to IAQ27A. Else if IAQ7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to IAQ28A. Otherwise, go to BOX IAQ9.		
401K_COMBINED1	IAQ26	<ul> <li>This next question is a bit different. You mentioned that [you/(SP)] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] have retirement accounts. In total, about how much is <u>currently</u> in all of these retirement accounts?</li> <li>IF NEEDED: Retirement accounts include 401K, 403B, IRA, and other retirement accounts.</li> <li>IF NEEDED: We don't need an exact dollar amount.</li> <li>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.</li> </ul>	(1) ENTER COMBINED AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED	[you] responde [(SP)] respond [(SP FIRSTNAM [(SPOUSE FIRS is not SP's spo [(PARTNER FIR proxy is not SP Display "curre
401K_COMBINED2	IAQ26A	ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	
401K_COMBINED3	IAQ26B	SHOW CARD IA13 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$34,000</li> <li>(2) \$34,000 TO LESS THAN</li> <li>\$82,000</li> <li>(3) \$82,000 TO LESS THAN</li> <li>\$175,000</li> <li>(4) \$175,000 TO LESS THAN</li> <li>\$413,000</li> <li>(5) \$413,000 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
401K_SP_AMT1	IAQ27A	This next question is a bit different. You mentioned that [you have/(SP) has] retirement accounts. In total, about how much is <u>currently</u> 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 people manage financially as they age and what effect this might have on their health. ENTER SP RETIREMENT ACCOUNT AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you have] res [(SP) has] resp Display "curre

ident is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) ident is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56)

AME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) RSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy pouse (ROSTREL^=2)

(IRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=256, HHFLAG=1), if respondent is proxy then SP's partner (ROSTREL^=56)

rently" in underlined text.

espondent is SP (SPPROXY=1) spondent is proxy (SPPROXY=2)

rently" in underlined text.

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
401K_SP_AMT2	IAQ27B	SHOW CARD IA14 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$20,000</li> <li>(2) \$20,000 TO LESS THAN</li> <li>\$47,000</li> <li>(3) \$47,000 TO LESS THAN</li> <li>\$92,000</li> <li>(4) \$92,000 TO LESS THAN</li> <li>\$218,000</li> <li>(5) \$218,000 OR MORE</li> <li>(-8) DON'T KNOW</li> </ul>	
	BOX IAQ6A	If IAQ26 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ28A. Otherwise, go to BOX IAQ7.	(-9) REFUSED	
401K_SPOUSE_AMT1	IAQ28A	This next question is a bit different. You mentioned that [you have/({SPOUSE FIRSTNAME LASTNAME}/{PARTNER FIRSTNAME LASTNAME} has)] retirement accounts. In total, about how much is <u>currently</u> 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.	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you have] resp [(SPOUSE FIRST proxy is not SP [(PARTNER FIRS proxy is not SP Display "currer
		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. ENTER SPOUSE/PARTNER RETIREMENT ACCOUNT AMOUNT		
401K_SPOUSE_AMT2	IAQ28B	SHOW CARD IA14 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$20,000</li> <li>(2) \$20,000 TO LESS THAN</li> <li>\$47,000</li> <li>(3) \$47,000 TO LESS THAN</li> <li>\$92,000</li> <li>(4) \$92,000 TO LESS THAN</li> <li>\$218,000</li> <li>(5) \$218,000 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
	BOX IAQ7	If IAQ7 = 1 (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IAQ29. Else if IAQ7 = 1 (SP HAS RETIREMENT ACCT), go to IAQ30A. Else if IAQ7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to IAQ31A. Otherwise, go to BOX IAQ8.		
RECIEVE_COMBINED1	IAQ29	Last month, how much altogether did [you/(SP)] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive	(2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED	[you] responde [(SP)] responde [(SP FIRSTNAM [(SPOUSE FIRST is not SP's spou [(PARTNER FIRS proxy is not SP' Display "Last m
RECIEVE_COMBINED2	IAQ29A	ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	

espondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

RSTNAME LASTNAME) has] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then SP's spouse (ROSTREL^=2)

IRSTNAME LASTNAME) has] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then SP's partner (ROSTREL^=56)

rently" in underlined text.

ident is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) indent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56)

AME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) RSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy pouse (ROSTREL^=2)

(IRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=256, HHFLAG=1), if respondent is proxy then SP's partner (ROSTREL^=56)

t month" in bold, underlined text.

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
RECIEVE_COMBINED3	IAQ29B	SHOW CARD IA15 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$200</li> <li>(2) \$200 TO LESS THAN \$500</li> <li>(3) \$500 TO LESS THAN</li> <li>\$1,000</li> <li>(4) \$1,000 TO LESS THAN</li> <li>\$2,500</li> <li>(5) \$2,500 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
RECEIVE_SP1	IAQ30A	<ul> <li>Last month, how much altogether did [you/(SP)] receive or withdraw from [your/his/her] retirement accounts (for the month of [CURRENT MONTH – 1])?</li> <li>IF NEEDED: We don't need an exact dollar amount.</li> <li>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.</li> </ul>	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] responde [(SP)] respond [your] responde [his] responde [her] responde Display "Last n
RECEIVE_SP2	IAQ30B	ENTER SP RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT SHOW CARD IA16 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$100</li> <li>(2) \$100 TO LESS THAN \$300</li> <li>(3) \$300 TO LESS THAN \$700</li> <li>(4) \$700 TO LESS THAN</li> <li>\$1,700</li> <li>(5) \$1,700 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
	BOX IAQ7A	If IAQ29 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ31A. Otherwise, go to BOX IAQ8.		
RECEIVE_SPOUSE1	IAQ31A	Last month, how much altogether did [you/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive or withdraw from [your/his/her] retirement accounts (for the month of [CURRENT MONTH – 1])? 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 people manage financially as they age and what effect this might have on their health. ENTER SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] responde [(SPOUSE FIRS proxy is not SP [(PARTNER FIR proxy is not SP [your] respond [his] SP has a s respondent is [her] SP has a s if respondent i
RECEIVE_SPOUSE2	IAQ31B	SHOW CARD IA16 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$100</li> <li>(2) \$100 TO LESS THAN \$300</li> <li>(3) \$300 TO LESS THAN \$700</li> <li>(4) \$700 TO LESS THAN</li> <li>\$1,700</li> <li>(5) \$1,700 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
	BOX IAQ8	If IAQ7 = 1 (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IAQ32. Else if IAQ7 = 1 (SP HAS RETIREMENT ACCT), go to IAQ33A. Else if IAQ7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to IAQ34A. Otherwise, go to BOX IAQ9.		

ndent is SP (SPPROXY=1) ndent is proxy (SPPROXY=2)

ondent is SP (SPPROXY=1) dent is proxy (SPPROXY=2), SP is male (ROSTSEX=1) ident is proxy (SPPROXY=2), SP is female (ROSTSEX=2)

month" in underlined text.

ident is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

RSTNAME LASTNAME) has] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then SP's spouse (ROSTREL^=2)

IRSTNAME LASTNAME) has] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then SP's partner (ROSTREL^=56)

ndent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1), SP's spouse or partner is male (ROSTSEX=1), if is proxy then proxy is not SP's spouse (ROSTREL^=2)

a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1), SP's spouse or partner is female (ROSTSEX=2), It is proxy then proxy is not SP's spouse (ROSTREL^=2)

t month" in underlined text.

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
YRRECIEVE_COMBINED1		<ul> <li>altogether did [you/(SP)] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive or withdraw from all of these retirement accounts?</li> <li>IF NEEDED: We don't need an exact dollar amount.</li> <li>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</li> </ul>	(1) ENTER COMBINED AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED	[(SP FIRSTNAN [(SPOUSE FIRS is not SP's spo [(PARTNER FIR proxy is not SF
YRRECIEVE_COMBINED2	IAQ32A	their health. ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT	(1) [continuous response]	Display "Last y
		RECEIVED/WITHDRAWN AMOUNT	(-8) DON'T KNOW (-9) REFUSED	
YRRECIEVE_COMBINED3	IAQ32B	Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$2,400</li> <li>(2) \$2,400 TO LESS THAN</li> <li>\$6,000</li> <li>(3) \$6,000 TO LESS THAN</li> <li>\$12,000</li> <li>(4) \$12,000 TO LESS THAN</li> <li>\$30,000</li> <li>(5) \$30,000 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
YRRECEIVE_SP1	IAQ33A	Now thinking about all of <u>last year</u> , that is calendar year [CURRENT YEAR – 1], how much altogether did [you/(SP)] receive or withdraw from all of [your/his/her] retirement plans?	(1) [continuous response]	[you] respond [(SP)] respond
		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 people manage financially as they age and what effect this might have on their health. ENTER SP RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT		[your] respond [his] responde [her] responde Display "last y
YRRECEIVE_SP2	IAQ33B	Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$1,200</li> <li>(2) \$1,200 TO LESS THAN</li> <li>\$3,600</li> <li>(3) \$3,600 TO LESS THAN</li> <li>\$8,400</li> <li>(4) \$8,400 TO LESS THAN</li> <li>\$20,400</li> <li>(5) \$20,400 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
	BOX IAQ8A	If IAQ32 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ34A. Otherwise, go to BOX IAQ9.		
YRRECEIVE_SPOUSE1	IAQ34A	<ul> <li>Now thinking about all of <u>last year</u>, that is calendar year [CURRENT YEAR – 1], how much altogether did [you/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive or withdraw from all of [your/his/her] retirement plans?</li> <li>IF NEEDED: We don't need an exact dollar amount.</li> <li>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.</li> <li>ENTER SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT</li> </ul>	(-9) REFUSED	[you] responde [(SPOUSE FIRS is not SP's spo [(PARTNER FIR proxy is not SP [your] respond [his] SP has a s respondent is [her] SP has a if respondent i
				Display "last y

ident is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) indent is proxy (SPPROXY=2), SP has a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1), proxy is not or partner (ROSTREL^=2 or 56)

AME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

RSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy bouse (ROSTREL^=2)

IRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=256, HHFLAG=1), if respondent is proxy then SP's partner (ROSTREL^=56)

year" in bold, underlined text.

ndent is SP (SPPROXY=1) ndent is proxy (SPPROXY=2)

ndent is SP (SPPROXY=1) dent is proxy (SPPROXY=2), SP is male (ROSTSEX=1) dent is proxy (SPPROXY=2), SP is female (ROSTSEX=2)

t year" in underlined text.

dent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

RSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy bouse (ROSTREL^=2)

IRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then SP's partner (ROSTREL^=56)

ndent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1), SP's spouse or partner is male (ROSTSEX=1), if is proxy then proxy is not SP's spouse or proxy (ROSTREL^=2 or 56)

a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1), SP's spouse or partner is female (ROSTSEX=2), t is proxy then proxy is not SP's spouse or proxy (ROSTREL^=2 or 56)

year" in underlined text.

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
YRRECEIVE_SPOUSE2	IAQ34B	SHOW CARD IA18 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$1,200</li> <li>(2) \$1,200 TO LESS THAN</li> <li>\$3,600</li> <li>(3) \$3,600 TO LESS THAN</li> <li>\$8,400</li> <li>(4) \$8,400 TO LESS THAN</li> <li>\$20,400</li> <li>(5) \$20,400 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
	BOX IAQ9	If [IAQ8 = 1 (SP MUTUAL FUNDS) and IAQ8 = 2 (SPOUSE MUTUAL FUNDS)] or IAQ8 = 3 (JOINT MUTUAL FUNDS) or [IAQ9 = 1 (SP BONDS) and IAQ9 = 2 (SPOUSE BONDS)] or IAQ9 = 3 (JOINT BONDS), go to IAQ35. Else if IAQ8 = 1 (SP MUTUAL FUNDS) or IAQ9 = 1 (SP BONDS), go to IAQ36A. Else if IAQ8 = 2 (SPOUSE MUTUAL FUNDS) or IAQ9 = 2 (SPOUSE BONDS), go to IAQ37A. Otherwise, go to BOX IAQ10.		
OTHER_COMBINED1	IAQ35	You told me earlier that [you/(SP)] and [(SP FIRSTNAME LASTNAME)/(SPOUSE/PARTNER FIRSTNAME LASTNAME)] own [mutual funds or stocks] [government, corporate, or other bonds] that are not part of retirement accounts. About how much are these worth? 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 people manage financially as they age and what effect this might have on their health.	(1) ENTER COMBINED AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED	[(SPOUSE FIRS is not SP's spo [(PARTNER FIF proxy is not SF [mutual funds [government,
OTHER_COMBINED2	IAQ35A	ENTER COMBINED SP AND SPOUSE'S/PARTNER'S MUTUAL FUNDS/STOCKS/BONDS AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	If more than o
OTHER_COMBINED3	IAQ35B	SHOW CARD IA19 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$9,000</li> <li>(2) \$9,000 TO LESS THAN</li> <li>\$18,000</li> <li>(3) \$18,000 TO LESS THAN</li> <li>\$93,000</li> <li>(4) \$93,000 TO LESS THAN</li> <li>\$350,000</li> <li>(5) \$350,000 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
	BOX IAQ9A	If [IAQ8 = 1 (SP MUTUAL FUNDS) and IAQ8 = 2 (SPOUSE MUTUAL FUNDS)] or IAQ8= 3 (JOINT MUTUAL FUNDS), go to IAQ35B. Otherwise, go to IAQ35C.		
OTHER_COMBINED4	IAQ35C	SHOW CARD IA20 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$600</li> <li>(2) \$600 TO LESS THAN</li> <li>\$5,000</li> <li>(3) \$5,000 TO LESS THAN</li> <li>\$16,000</li> <li>(4) \$16,000 TO LESS THAN</li> <li>\$62,000</li> <li>(5) \$62,000 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	

ident is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) ident is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56)

AME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

RSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy bouse (ROSTREL^=2)

(IRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=256, HHFLAG=1), if respondent is proxy then SP's partner (ROSTREL^=56)

ds or stocks] IA8 =1/SP MUTUAL FUNDS or 2/SPOUSE MUTUAL FUNDS or 3/JOINT MUTUAL FUNDS t, corporate, or other bonds] IA9=1/SP BONDS or 2/SPOUSE BONDS or 3/JOINT BONDS

one type of asset displayed, display "and" between them.

Variable Name	MR Screen	Question text/description	Code list	Text Fill Logic
OTHER_SP1	Name IAQ36A BOX IAQ9B IAQ36B	these worth?         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 people manage financially as they age and what effect this might have on their health.         ENTER SP MUTUAL FUNDS/STOCKS/BONDS AMOUNT         If IAQ8 = 1 (SP MUTUAL FUNDS), go to IAQ36B.         Otherwise, go to IAQ36C.         SHOW CARD IA21	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED (1) LESS THAN \$8,000 (2) \$8,000 TO LESS THAN	[you own] res [(SP) owns] re [mutual funds [government, If more than o
		Please look at this card and tell me which is closest.	\$62,000 (3) \$62,000 TO LESS THAN \$192,000 (4) \$192,000 TO LESS THAN \$213,000 (5) \$213,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
OTHER_SP3	IAQ36C	Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$300</li> <li>(2) \$300 TO LESS THAN</li> <li>\$2,500</li> <li>(3) \$2,500 TO LESS THAN</li> <li>\$8,000</li> <li>(4) \$8,000 TO LESS THAN</li> <li>\$37,000</li> <li>(5) \$37,000 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
	BOX IAQ9C	If IAQ8 = 2 (SPOUSE MUTUAL FUNDS) or IAQ9 = 2 (SPOUSE BONDS), go to IAQ37A. Otherwise, go to BOX IAQ10.		
OTHER_SPOUSE1	IAQ37A	You told me earlier that [you own/(SPOUSE FIRSTNAME LASTNAME) owns/(PARTNER	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you own] res [(SPOUSE FIRS proxy is not SF [(PARTNER FIF then proxy is r [mutual funds [government, If more than c
	BOX IAQ9D	If IAQ8 = 2 (SPOUSE MUTUAL FUNDS), go to IAQ37B. Otherwise, go to IA37B.		
OTHER_SPOUSE2	IAQ37B	SHOW CARD IA21 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$8,000</li> <li>(2) \$8,000 TO LESS THAN</li> <li>\$62,000</li> <li>(3) \$62,000 TO LESS THAN</li> <li>\$192,000</li> <li>(4) \$192,000 TO LESS THAN</li> <li>\$213,000</li> <li>(5) \$213,000 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	

с

respondent is SP (SPPROXY=1) respondent is proxy (SPPROXY=2)

nds or stocks] IA8=1/SP MUTUAL FUNDS nt, corporate, or other bonds] IA9=1/SP BONDS

n one type of asset displayed, display "and" between them.

espondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

RSTNAME LASTNAME) owns] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then SP's spouse (ROSTREL^=2)

FIRSTNAME LASTNAME) owns] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy is not SP's partner (ROSTREL^=56)

ds or stocks] IA8=2/SPOUSE MUTUTAL FUNDS t, corporate, or other bonds] IA9=2/SPOUSE BONDS

one type of asset displayed, display "and" between each one.

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
OTHER_SPOUSE3	IAQ37C	SHOW CARD IA22 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$300</li> <li>(2) \$300 TO LESS THAN</li> <li>\$2,500</li> <li>(3) \$2,500 TO LESS THAN</li> <li>\$8,000</li> <li>(4) \$8,000 TO LESS THAN</li> <li>\$37,000</li> <li>(5) \$37,000 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
	BOX IAQ10	If [IAQ10 = 1 (SP CHECKING) and IAQ10 = 2 (SPOUSE CHECKING)] or [IAQ10 = 3 (JOINT CHECKING) or [IAQ11 = 1 (SP SAVINGS) and IAQ11 = 2 (SPOUSE SAVINGS)] or IAQ11 = 3 (JOINT SAVINGS), or [IAQ12 = 1 (SP CDS) and IAQ12= 2 (SPOUSE CDS)] or IAQ12 = 3 (JOINT CDS), go to IAQ38. Else if IAQ10 = 1 (SP CHECKING) or IAQ11 = 1 (SP SAVINGS) or IAQ13 = 1 (SP CDS), go to IAQ39A. Else if IAQ10 = 2 (SPOUSE CHECKING) or IAQ11 = 2 (SPOUSE SAVINGS) or IAQ13 = 2 (SPOUSE CDS), go to IAQ40A. Otherwise, go to BOX IAQ11.		
ACCTS_COMBINED1	IAQ38		(1) ENTER COMBINED AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED	[(SPOUSE FIRS is not SP's spo [(PARTNER FIR proxy is not SF [checking acco [savings or mo [certificates of If more than o
ACCTS_COMBINED2	IAQ38A	ENTER COMBINED SP AND SPOUSE'S/PARTNER'S ACCOUNTS TOTAL AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	Display "last m
	BOX IAQ10A	If IAQ12 = [1 (SP CDs) and 2 (SPOUSE CDs)] or 3 (JOINT CDs), go to IAQ38B. Otherwise, go to IAQ38C.		
ACCTS_SEPARATE1	IAQ38B	SHOW CARD IA23 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$11,000</li> <li>(2) \$11,000 TO LESS THAN</li> <li>\$25,000</li> <li>(3) \$25,000 TO LESS THAN</li> <li>\$50,000</li> <li>(4) \$50,000 TO LESS THAN</li> <li>\$108,000</li> <li>(5) \$108,000 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
ACCTS_SEPARATE2	IAQ38C	SHOW CARD IA24 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$2,000</li> <li>(2) \$2,000 TO LESS THAN</li> <li>\$7,000</li> <li>(3) \$7,000 TO LESS THAN</li> <li>\$17,000</li> <li>(4) \$17,000 TO LESS THAN</li> <li>\$57,000</li> <li>(5) \$57,000 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	

ident is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) indent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56)

AME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) RSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy pouse (ROSTREL^=2)

IRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=256, HHFLAG=1), if respondent is proxy then SP's partner (ROSTREL^=56)

counts] IA10a=1/SP CHECKING or IA10a=2/SPOUSE CHECKING or IA10a=3/JOINT CHECKING noney market accounts] IA10b=1/SP SAVINGS or IA10b=2/SPOUSE SAVINGS or IA10b=3/JOINT SAVINGS of deposit or CDs] IA10c=1/SP CDS or IA10c=2/SPOUSE CDS or IA10c=3/JOINT CDS

one type of account displayed, display "and" between each one.

month" in underlined text.

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
ACCTS_SP1	IAQ39A	You told me earlier that [you have/(SP) has] [a checking account] [a savings or money market account] [certificates of deposit or CDs].	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you have] res [(SP) has] resp
		If you added up all of these accounts, about how much were they worth early <u>last month</u> (meaning in the beginning of [CURRENT MONTH – 1])?		[a checking ac [a savings or n [certificates of
		IF NEEDED: We don't need an exact dollar amount.		If more than o
		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.		Display "last m
		ENTER SP ACCOUNTS TOTAL AMOUNT		
	BOX IAQ10B	If IAQ12 = 1 (SP CDs), go to IAQ39b. Otherwise, go to IAQ39c.		
ACCTS_SP2	IAQ39B	SHOW CARD IA25	(1) LESS THAN \$8,000	
			(2) \$8,000 TO LESS THAN	
		Please look at this card and tell me which is closest.	\$13,000	
			(3) \$13,000 TO LESS THAN \$28,000	
			(4) \$28,000 TO LESS THAN	
			\$54,000	
			(5) \$54,000 OR MORE	
			(-8) DON'T KNOW	
	IAQ39C	SHOW CARD IA26	(-9) REFUSED	
ACCTS_SP3	IAQ39C	SHOW CARD IA26	(1) LESS THAN \$500 (2) \$500 TO LESS THAN	
		Please look at this card and tell me which is closest.	\$1,900	
			(3) \$1,900 TO LESS THAN	
			\$5,000	
			(4) \$5,000 TO LESS THAN	
			\$20,000	
			(5) \$20,000 OR MORE (-8) DON'T KNOW	
			(-9) REFUSED	
	BOX IAQ10C	If IAQ10 = 2 (SPOUSE CHECKING) or IAQ11 = 2 (SPOUSE SAVINGS) or IAQ12 = 2 (SPOUSE		
		CDS), go to IAQ40A.		
		Otherwise, go to BOX IAQ11.		
ACCTS_SPOUSE1	IAQ40A	You told me earlier that [you have/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER	(1) [continuous response]	[you have] res
		FIRSTNAME LASTNAME) has] [a checking account] [a savings or money market account] [certificates of deposit or CDs].	(-8) DON'T KNOW (-9) REFUSED	[(SPOUSE FIRS proxy is not SP
				[(PARTNER FIR
		If you added up all of these accounts, about how much were they worth early <u>last month</u>		proxy is not SP
		(meaning in the beginning of [CURRENT MONTH – 1])?		
				[a checking ac
		IF NEEDED: We don't need an exact dollar amount.		[a savings or m
		IF NEEDED: We know questions like these may be difficult to answer, but we need to know		[certificates of
		this to understand how people manage financially as they age and what effect this might		If more than o
		have on their health.		Display "last m
		ENTER SPOUSE/PARTNER ACCOUNTS TOTAL AMOUNT		
	BOX IAQ10D	If $IAQ12 = 2$ (SPOUSE CDS), go to $IAQ40b$ .		
ACCTS SPOUSE2	IAQ40B	Otherwise, go to IAQ40c. SHOW CARD IA25	(1) LESS THAN \$8,000	
			(2) \$8,000 TO LESS THAN	
		Please look at this card and tell me which is closest.	\$13,000	
			(3) \$13,000 TO LESS THAN	
			\$28,000	
			(4) \$28,000 TO LESS THAN	
			\$54,000 (5) \$54,000 OR MORE	
			(-8) DON'T KNOW	
			(-9) REFUSED	
	•	-		

respondent is SP (SPPROXY=1) espondent is proxy (SPPROXY=2)

account] IA10a=1/SP CHECKING or money market account] IA10c=1/SP SAVINGS s of deposit or CDs] IA10c=1/SP CDS

n one type of account displayed, display "and" between each one.

t month" in underlined text.

respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

RSTNAME LASTNAME) has] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then SP's spouse (ROSTREL^=2)

FIRSTNAME LASTNAME) has] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then SP's partner (ROSTREL^=56)

account] IA10a=2/SPOUSE CHECKING or money market account] IA10b=2/SPOUSE SAVINGS s of deposit or CDs] IA10c=2/SPOUSE CDS

one type of account displayed, display "and" between each one.

month" in underlined text.

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
ACCTS_SPOUSE3	Name IAQ40C BOX IAQ11	SHOW CARD IA26         Please look at this card and tell me which is closest.         If [IAQ8 = 1 (SP MUTUAL FUNDS) and IAQ8 = 2 (SPOUSE MUTUAL FUNDS)] or IAQ8 = 3 (JOINT MUTUAL FUNDS) or         [IAQ9 = 1 (SP BONDS) and IAQ9 = 2 (SPOUSE BONDS)] or IAQ9 = 3 (JOINT BONDS), or         [IAQ9 = 1 (SP BONDS) and IAQ9 = 2 (SPOUSE BONDS)] or IAQ9 = 3 (JOINT BONDS), or	<ul> <li>(1) LESS THAN \$500</li> <li>(2) \$500 TO LESS THAN</li> <li>\$1,900</li> <li>(3) \$1,900 TO LESS THAN</li> <li>\$5,000</li> <li>(4) \$5,000 TO LESS THAN</li> <li>\$20,000</li> <li>(5) \$20,000 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
		<ul> <li>[IAQ10 = 1 (SP CHECKING) and IAQ10 = 2 (SPOUSE CHECKING)] or IAQ10 = 3 (JOINT CHECKING) or</li> <li>[IAQ11 = 1 (SP SAVINGS) and IAQ11 = 2 (SPOUSE SAVINGS)] or IAQ11 = 3 (JOINT SAVINGS), or</li> <li>[IAQ12 = 1 (SP CDS) and IAQ12= 2 (SPOUSE CDS)] or IAQ12 = 3 (JOINT CDS), go to IAQ41.</li> <li>Else if IAQ8 = 1 (SP MUTUAL FUNDS) or IAQ9 = 1 (SP BONDS) or IAQ10 = 1 (SP CHECKING) or IAQ11 = 1 (SP</li> <li>SAVINGS) or IAQ12 = 1 (SP CDS), go to IAQ42A.</li> <li>Else if IAQ8 = 2 (SPOUSE MUTUAL FUNDS) or IAQ9 = 2 (SPOUSE BONDS) or IAQ10 = 2 (SPOUSE CHECKING) or</li> <li>IAQ11 = 2 (SPOUSE SAVINGS) or IAQ12 = 2 (SPOUSE CDS), go to IAQ43A.</li> <li>Otherwise, go to BOX IAQ12.</li> </ul>		
INTEREST_COMBINED1	IAQ41	Now thinking about all of last year, that is calendar year [CURRENT YEAR – 1], how much interest and dividend income did [you/(SP)] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] have altogether from [mutual funds or stocks] [government, corporate, or other bonds] [bank accounts or CDs]? 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 people manage financially as they age and what effect this might have on their health.	SEPARATELY (-8) DON'T KNOW (-9) REFUSED	[you] responde [(SP)] responde [(SP FIRSTNAW [(SPOUSE FIRST is not SP's spon [(PARTNER FIR proxy is not SP [mutual funds [government, of [bank accounts 3/JOINT SAVIN If more than of Display "In the
INTEREST_COMBINED2	IAQ41A	ENTER SP AND SPOUSE'S/PARTNER'S INTEREST AND DIVIDEND INCOME AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	
INTEREST_COMBINED3	IAQ41B	SHOW CARD IA27 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$200</li> <li>(2) \$200 TO LESS THAN</li> <li>\$1,000</li> <li>(3) \$1,000 TO LESS THAN</li> <li>\$4,000</li> <li>(4) \$4,000 TO LESS THAN</li> <li>\$16,000</li> <li>(5) \$16,000 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	

ndent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) Indent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56)

AME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) RSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy pouse (ROSTREL^=2)

IRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=256, HHFLAG=1), if respondent is proxy then SP's partner (ROSTREL^=56)

ds or stocks] IA8=1/SP MUTUAL FUNDs or 2/SPOUSE MUTUAL FUND) or 3/JOINT MUTUAL FUNDS at, corporate, or other bonds] IA9=1/SP BONDS or 2/SPOUSE BONDS or 3/JOINT BONDS ants or CDs] (IA10a=1/SP CHECKING or 2/SPOUSE CHECKING or 3/JOINT CHECKING) or (IA10b = 1/SP SAVINGS or 2/SPOUSE SAVINGS or /INGS) or (IA10c=1/SP CDS or 2/SPOUSE CDS or 3/JOINT CDS)

one type of asset displayed, display "and" between each one.

ne last year" in underlined text.

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
INTEREST_SP1	IAQ42A	Now thinking about all of <u>last year</u> , that is calendar year [CURRENT YEAR – 1], how much interest and dividend income did [you/(SP)] have altogether from [mutual funds or stocks] [bonds] [bank accounts or CDs]?	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] responde [(SP)] respond
		IF NEEDED: We don't need an exact dollar amount.		[mutual funds [bonds] IA9=1/ [bank accounts
		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 more than o
		ENTER SP INTEREST AND DIVIDEND INCOME AMOUNT		Display "last ye
INTEREST_SP2	IAQ42B	Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$400</li> <li>(2) \$400 TO LESS THAN</li> <li>\$1,000</li> <li>(3) \$1,000 TO LESS THAN</li> <li>\$2,000</li> <li>(4) \$2,000 TO LESS THAN</li> <li>\$11,000</li> <li>(5) \$11,000 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
	BOX IAQ11A	If IAQ8 = 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 IAQ43A. Otherwise, go to BOX IAQ12.		
INTEREST_SPOUSE1	IAQ43A		(-8) DON'T KNOW (-9) REFUSED	[you] responde [(SPOUSE FIRS is not SP's spor [(PARTNER FIR proxy is not SP [mutual funds [bonds] IA9=2/ [bank accounts If more than o
INTEREST_SPOUSE2	IAQ43B	Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$400</li> <li>(2) \$400 TO LESS THAN</li> <li>\$1,000</li> <li>(3) \$1,000 TO LESS THAN</li> <li>\$2,000</li> <li>(4) \$2,000 TO LESS THAN</li> <li>\$11,000</li> <li>(5) \$11,000 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	Display "In the
	BOX IAQ12	If [IAQ13 = 1 (SP BUSINESS/FARM/REAL ESTATE) and IAQ13 = 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. Else if IAQ13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IAQ46A. Otherwise, go to BOX IAQ13.		
LAND_COMBINED1	IAQ44	You told me earlier that [you/(SP)] and [(SP FIRSTNAME LASTNAMe)/(SPOUSE FIRSTNAME LASTNAME)/PARTNER FIRSTNAME LASTNAME] have a business, a farm, or real estate [other than (SP)'s home]. If that were sold today and any debts on it were paid off, about how much would it bring?	AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED	[you] responde [(SP)] responde [(SP FIRSTNAM [(SPOUSE FIRS is not SP's spon [(PARTNER FIR proxy is not SP

# ic

ndent is SP (SPPROXY=1) ndent is proxy (SPPROXY=2)

ds or stocks] IA8=1/SP MUTUAL FUNDS =1/SP BONDS Ints or CDs] IA10a=1/SP CHECKING or IA10b=1/SP SAVINGS or IA10c=1/SP CDS

one type of asset displayed, display "and" between each one.

t year" in underlined text.

ident is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

RSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy bouse (ROSTREL^=2)

IRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then SP's partner (ROSTREL^=56)

ds of stocks] IA8=2/SPOUSE MUTUAL FUNDS

2/SPOUSE BONDS

nts or CDs] IA10a=2/SPOUSE CHECKING or IA10b=2/SPOUSE SAVINGS or IA10c=2/SPOUSE CDS

one type of asset displayed, display "and" between each one.

he last year" in bold underlined text.

ndent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) ndent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56)

ME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

RSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy bouse (ROSTREL^=2)

IRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=256, HHFLAG=1), if respondent is proxy then SP's partner (ROSTREL^=56)

(SP)'s home] HP1=1/OWNS HOME

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
LAND_COMBINED2	IAQ44A	ENTER SP AND SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE COMBINED AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	
LAND_COMBINED3	IAQ44B	SHOW CARD IA29 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$30,000</li> <li>(2) \$30,000 TO LESS THAN</li> <li>\$101,000</li> <li>(3) \$101,000 TO LESS THAN</li> <li>\$247,000</li> <li>(4) \$247,000 TO LESS THAN</li> <li>\$703,000</li> <li>(5) \$703,000 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
LAND_SP1	IAQ45A	You told me earlier that [you have/(SP) has] a business, a farm, or real estate [other than (SP)'s home]. If that were sold today and any debts on it were paid off, about how much would it bring? 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 people manage financially as they age and what effect this might have on their health.	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you have] res [(SP) has] resp [other than (SF
LAND_SP2	IAQ45B	ENTER SP BUSINESS/FARM/REAL ESTATE AMOUNT SHOW CARD IA30 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$18,000</li> <li>(2) \$18,000 TO LESS THAN</li> <li>\$68,000</li> <li>(3) \$68,000 TO LESS THAN</li> <li>\$122,000</li> <li>(4) \$122,000 TO LESS THAN</li> <li>\$293,000</li> <li>(5) \$293,000 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(0) REFLISED</li> </ul>	
	BOX IAQ12A	If IAQ13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IAQ46A. Otherwise, go to BOX IAQ13.	(-9) REFUSED	
LAND_SPOUSE1		You told me earlier that [you have/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME) has] a business, a farm, or real estate [other than (SP)'s home]. If that were sold today and any debts on it were paid off, about how much would it bring? 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 people manage financially as they age and what effect this might have on their health. ENTER SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE AMOUNT	(-9) REFUSED	[you have] res [(SPOUSE FIRS proxy is not SP [(PARTNER FIR proxy is not SP [other than (SF
LAND_SPOUSE2	IAQ46B	SHOW CARD IA30 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$18,000</li> <li>(2) \$18,000 TO LESS THAN</li> <li>\$68,000</li> <li>(3) \$68,000 TO LESS THAN</li> <li>\$122,000</li> <li>(4) \$122,000 TO LESS THAN</li> <li>\$293,000</li> <li>(5) \$293,000 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
	BOX IAQ13	If [IAQ13 = 1 (SP BUSINESS/FARM/REAL ESTATE) and IAQ13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE)] or IAQ13 = 3 (JOINT BUSINESS/FARM/REAL ESTATE), go to IAQ47. Else if IAQ13 = 1 (SP BUSINESS/FARM/REAL ESTATE), go to IAQ48A. Else if IAQ13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IAQ49A. Otherwise, go to IAQ50.		

espondent is SP (SPPROXY=1) spondent is proxy (SPPROXY=2)

(SP)'s home] HP1=1/OWNS HOME

espondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

RSTNAME LASTNAME) has] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then SP's spouse (ROSTREL^=2)

IRSTNAME LASTNAME) has] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then SP's partner (ROSTREL^=56)

(SP)'s home] HP1=1/OWNS HOME

Variable Name	MR Screen	Question text/description	Code list	Text Fill Logic
INCOME_COMBINED1 INCOME_COMBINED2 INCOME_COMBINED3	IAQ47A IAQ47B	Now thinking about all of last year, that is calendar year [CURRENT YEAR – 1], how much income did [you/(SP)] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive from these businesses or property before any federal or state taxes were taken out?         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 people manage financially as they age and what effect this might have on their health.         ENTER SP AND SPOUSE/PARTNER FROM BUSINESS/FARM/REAL ESTATE COMBINED AMOUNT         SHOW CARD IA31	(1) ENTER COMBINED AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED	[you] responde [(SP)] respond
			<ul> <li>(3) \$12,000 TO LESS THAN</li> <li>\$25,000</li> <li>(4) \$25,000 TO LESS THAN</li> <li>\$64,000</li> <li>(5) \$64,000 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
INCOME_SP1	IAQ48A	Now thinking about all of <u>last year</u> , that is calendar year [CURRENT YEAR – 1], how much income did [you/(SP)] receive from these businesses or property before any federal or	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] respond [(SP)] respond Display "last y
INCOME_SP2	IAQ48B	Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$3,600</li> <li>(2) \$3,600 TO LESS THAN</li> <li>\$7,200</li> <li>(3)\$7,200 TO LESS THAN</li> <li>\$14,000</li> <li>(4) \$14,000 TO LESS THAN</li> <li>\$38,000</li> <li>(5) \$38,000 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
INCOME_SPOUSE1	BOX IAQ13A	income did [you/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)]	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] responde [(SPOUSE FIRS is not SP's spo [(PARTNER FIR proxy is not SP Display "last ye

ndent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) ndent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56)

AME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

RSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy pouse (ROSTREL^=2)

FIRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=256, HHFLAG=1), if respondent is proxy then SP's partner (ROSTREL^=56)

year" in underlined text.

ndent is SP (SPPROXY=1) ondent is proxy (SPPROXY=2)

t year" in underlined text.

ndent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

RSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy pouse (ROSTREL^=2)

FIRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then SP's partner (ROSTREL^=56)

year" in underlined text.

Variable Name	MR Screen	Question text/description	Code list	Text Fill Logic
INCOME_SPOUSE2	Name IAQ49B	SHOW CARD IA32	(1) LESS THAN \$3,600 (2) \$3,600 TO LESS THAN	
		Please look at this card and tell me which is closest.	(2) \$3,600 TO LESS THAN \$7,200 (3)\$7,200 TO LESS THAN	
			\$14,000 (4) \$14,000 TO LESS THAN	
			\$38,000 (5) \$38,000 OR MORE	
			(-8) DON'T KNOW (-9) REFUSED	
TOTAL_COMBINED1	IAQ50	Now I want to ask about [your/(SP)'s] [and (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)'s] total income for <u>last year</u> , that is, for the calendar year ending in December [CURRENT YEAR - 1], before any federal or state taxes were taken out.	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[your] respond [(SP)'s] respond [and (SP FIRSTI [and (SPOUSE F
		Now think about that total income from:		proxy is not SP
		[Social Security or Railroad Retirement] [Supplemental Security Income] [the Veteran's Administration] [a pension plan] [any retirement accounts] [mutual funds or stocks]		[and (PARTNER proxy is not SP
		[bonds] [bank accounts] [CDs] [business, farm or real estate] [jobs] and from any other sources.		[Social Security
		How much was [your/(SP)'s] [and (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME		[Supplemental [the Veteran's
		LASTNAME)/(PARTNER FIRSTNAME LASTNAME)'s] total income before taxes for last year (this is, for the 12 months ending in December [CURRENT YEAR - 1])?		[a pension plar [any retiremen
		IF NEEDED: We don't need an exact dollar amount – the nearest \$1,000 is fine.		[mutual funds [bonds] IAQ9=:
				[bank accounts
		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		[CDs] IAQ10C= [business, farm
		have on their health.		[jobs] LF1=1 or
		ENTER TOTAL INCOME FOR LAST YEAR.		If SPAISTATUS=
		DO NOT INCLUDE LUMP SUM PAYMENTS RECEIVED FROM AN INHERITANCE, A TRUST FUND, AN INSURANCE SETTLEMENT, A PENSION SETTLEMENT, OR A GIFT.		If more than or
	BOX IAQ13B	If SPAISTATUS = 3 (Deceased in Community) or 4 (Deceased in Institution), go to BOX		Display "last ye
		ENDIAQ. Otherwise, go to IAQ52-LUMP.		
	BOX IAQ14	If SPMARSTA = 1 (MARRIED) SP has a spouse or partner who is living in the household (ROSTREL=2 or 65, HHFLAG=1), go to IAQ51A.		
TOTAL_COMBINED2	IAQ51A	Otherwise, go to IAQ51B. SHOW CARD IA33	(1) LESS THAN \$30,000	
		Please look at this card and tell me which is closest.	(2) \$30,000 TO LESS THAN \$43,000	
			(3) \$43,000 TO LESS THAN \$66,000	
			(4) \$66,000 TO LESS THAN \$109,000	
			(5) \$109,000 OR MORE	
			(-8) DON'T KNOW (-9) REFUSED	
TOTAL_SP1	IAQ51B	SHOW CARD IA34	(1) LESS THAN \$18,000 (2) \$18,000 TO LESS THAN	
		Please look at this card and tell me which is closest.	\$22,000 (3) \$22,000 TO LESS THAN	
			\$36,000	
			(4) \$36,000 TO LESS THAN \$56,000	
			(5) \$56,000 OR MORE (-8) DON'T KNOW	
			(-9) REFUSED	

ndent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) ondent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56)

STNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)

E FIRSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then SP's spouse (ROSTREL^=2)

IER FIRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then SP's partner (ROSTREL^=56)

tity or Railroad Retirement] IAQ1=1 or 2 tal Security Income] IAQ4=1 or 2 n's Administration] IAQ5=1 or 2 lan] IAQ6=1 or 2 lent accounts] IAQ7=1 or 2 ds or stocks] IAQ8=1, 2 or 3 9=1, 2, or 3 nts] (IAQ10A=1, 2, or 3) or (IAQ10B=1, 2, or 3) C=1, 2, or 3 lrm, or real estate] IAQ13=1, 2, or 3 or LF2=1 or LF3=1 or LF13=1

S=3 (Deceased in Community) or 4 (Deceased in Institution), display all sources of income.

one income source displayed, display "and" between each one.

year" in underlined text."

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
	BOX IAQ15	If SPAISTATUS = 3 (Deceased in Community) or 4 (Deceased in Institution), go to BOX ENDIAQ. Otherwise, go to IAQ52-LUMP.		
LUMP	IAQ52	SHOWCARD IA35 People sometimes receive large amounts of money or property in the form of an inheritance, a trust fund, an insurance settlement, and so on. Now thinking about last year, that is, the calendar year ending in December [CURRENT YEAR - 1], [have you/has (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] received money or property in the form of an inheritance, a trust fund, an insurance settlement, a pension settlement, a gift, or a lawsuit?	(1) YES, SP OR SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE (2) NO PAYMENT RECEIVED FROM THIS SOURCE (-8) DON'T KNOW (-9) REFUSED	[have you] resp ROSTREL=2 or [has (SP)] resp ROSTREL=2 or [you or (SP FIR [you or (SPOU! HHFLAG=1) [(SP) or (PARTI HHFLAG=1), pr [(SP) or (PARTI HHFLAG=1), pr
LUMPFORM	IAQ52A	SHOWCARD IA35 What was the largest lump sum [you/(SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] received - was it from an inheritance, a trust, an insurance settlement, a pension settlement, a gift, a lawsuit, or what?	<ul> <li>(1) INSURANCE SETTLEMENT</li> <li>(2) PENSION SETTLEMENT</li> <li>(3) INHERITANCE (OR TRUST)</li> <li>(4) GIFT</li> <li>(5) LASWSUIT</li> <li>(91) OTHER (SPECIFY)</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	[you] responde 56 and HHFLAG [(SP)] responde ROSTREL=2 or [you or (SP FIR [you or (SPOUS HHFLAG=1) [(SP) or (PARTN HHFLAG=1), pr [(SP) or (PARTN HHFLAG=1), pr
LUMP_OTH	IAQ52A	OTHER (SPECIFY)	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	ΠΠΕΑΟ-1), μ
LUMP_SUM1	IAQ52B	About how much did [you/(SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive from the [insurance settlement/pension settlement/inheritance or trust/gift/lawsuit/(OTHER)]? DO NOT PROBE.	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] responde 56 and HHFLAG [(SP)] responde ROSTREL=2 or [you or (SP FIR [you or (SPOUS HHFLAG=1) [you or (PARTN HHFLAG=1) [(SP) or (SPOUS HHFLAG=1), pr [(SP) or (PARTN HHFLAG=1), pr [insurance sett [pension settle [inheritance or [gift] IAQ13c=4 [lawsuit] IAQ13 [(OTHER)] IAQ3
LUMP_SUM2	IAQ52C	Did it amount to less than \$50,000, more than \$50,000, or what? DO NOT PROBE.	<ul> <li>(1) LESS THAN \$50K</li> <li>(2) ABOUT \$50K</li> <li>(3) MORE THAN \$50K</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	I[(UTHEK)] IAQ

espondent is SP (SPPROXY=1), SP does not have a spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or or 56 and HHFLAG^=1)

spondent is proxy (SPPROXY=2), SP does not have a spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or or 56 and HHFLAG^=1)

IRSTNAME LASTNAME)] respondent is proxy (SPPROXY), proxy is SP's spouse or partner (ROSTREL=2 or 56, HHFLAG=1)

OUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2,

TNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56,

USE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, proxy is not SP's spouse (ROSTREL^=2)

TNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, proxy is not SP's [partner (ROSTREL^=56)

dent is SP (SPPROXY=1), SP does not have a spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or AG^=1)

ident is proxy (SPPROXY=2), SP does not have a spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or or 56 and HHFLAG^=1)

IRSTNAME LASTNAME)] respondent is proxy (SPPROXY), proxy is SP's spouse or partner (ROSTREL=2 or 56, HHFLAG=1)

USE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2,

TNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56,

USE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, proxy is not SP's spouse (ROSTREL^=2)

TNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, proxy is not SP's [partner (ROSTREL^=56)

dent is SP (SPPROXY=1), SP does not have a spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or AG^=1)

ident is proxy (SPPROXY=2), SP does not have a spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or or 56 and HHFLAG^=1)

IRSTNAME LASTNAME)] respondent is proxy (SPPROXY), proxy is SP's spouse or partner (ROSTREL=2 or 56, HHFLAG=1)

USE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2,

TNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56,

USE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, proxy is not SP's spouse (ROSTREL^=2)

TNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, proxy is not SP's [partner (ROSTREL^=56)

ettlement] IAQ13c=1/Insurance Settlement tlement] IAQ13c=2/Pension Settlement or trust] IAQ13c=3/Pension Settlement =4/Pension Settlement t13c=5/Pension Settlement Q13c=91/Other

Variable Name	MR Screen	Question text/description	Code list	Text Fill Logic
OWNCAR	CO1	Now, I would like to change topics and talk about automobiles [you own/(SP) owns] [or (your/his/her) (husband/wife/partner)] own any cars, trucks, or vans?         ID you/Does (SP)] [or (your/his/her) (husband/wife/partner)] own any cars, trucks, or vans?         IF NEEDED: Do not include recreational vehicles, such as motorcycles, trailers, motor homes, boats, or airplanes.	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED	[you own] resp [(SP) owns] res [or your husban is male (ROSTE male (ROSTE female (ROSTE) female (ROSTS) [or your wife o female (ROSTS) [or your partner (respondent is (ROSTREL=56)) [or his husban (ROSTREL=56)) [or his wife ow HHFLAG=1), SP [or his partner HHFLAG=1), pr [or her husban (ROSTREL=2, H [or her wife ow HHFLAG=1), SP [or her partner (ROSTREL=56, I
NUMCAR	CO2	How many vehicles [do you/does (SP)] [or (your/his/her) (husband/wife/partner)] own? ENTER NUMBER OF VEHICLES	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[Do you] respond [do you] respond [does (SP)] respond [does (SP)] respond [does (SP)] respond [does (SP)] respond [or your husband (ROSTSEX=1), p [or your wife] ( (ROSTESEX=2)) (ROSTSEX=2), p [or your partner proxy (SPPROX [or his husband HHFLAG=1), SP [or his partner] HHFLAG=1), SP [or her husband HHFLAG=1), SP [or her wife] respond [or her wife] respond [or her wife] respond [or her partner] [or her partner] [or her partner] [or her partner]
	BOX CO2	If CO2 NE 2, go to CO3. Otherwise, go to FSINTRO1.		
PVCAR1	CO3	Altogether, what is their present value, that is, about how much would they bring if [you/(SP)] sold them on today's market? ENTER DOLLAR AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] responde [(SP)] responde

spondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) espondent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56)

band owns] (respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse TESEX=1)) or (respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP is SEX=1), proxy is SP's spouse (ROSTREL=2))

e owns] (respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is TESEX=2)) or (respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP is TSEX=2), proxy is SP's spouse (ROSTREL=2))

ner owns] (respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1)) or is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is SP's partner 5))

ind owns] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP has a spouse who is alive and living in the household (ROSTREL=2, SP's spouse is male (ROSTSEX=1), proxy is not SP's spouse (ROSTREL^=2)

owns] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP has a spouse who is alive and living in the household (ROSTREL=2, SP's spouse is female (ROSTSEX=2), proxy is not SP's spouse (ROSTREL=2)

er owns] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP has a partner who is alive and living in the household (ROSTREL=56, proxy is not SP's partner (ROSTREL^=56)

and owns] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP has a spouse who is alive and living in the household HHFLAG=1), SP's spouse is male (ROSTSEX=1), proxy is not SP's spouse (ROSTREL^=2)

owns] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP has a spouse who is alive and living in the household (ROSTREL=2, SP's spouse is female (ROSTSEX=2), proxy is not SP's spouse (ROSTREL=2)

ner owns] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP has a partner who is alive and living in the household 5, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56)

pondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) pondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56)

espondent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56)

band] (respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is SEX=1)), or (respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP is male ), proxy is SP's spouse (ROSTREL=2))

e] (respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is female 2)) or (respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP is female 1, proxy is SP's spouse (ROSTREL=2))

ner] (respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1)) or (respondent is DXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is SP's partner (ROSTREL=56)) and] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP has a spouse who is alive and living in the household (ROSTREL=2,

SP's spouse is male (ROSTSEX=1), proxy is not SP's spouse (ROSTREL^=2) respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP has a spouse who is alive and living in the household (ROSTREL=2, SP's spouse is female (ROSTSEX=2), proxy is not SP's spouse (ROSTREL^=2)

er] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP has a partner who is alive and living in the household (ROSTREL=56, proxy is not SP's partner (ROSTREL^=56)

and] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP has a spouse who is alive and living in the household (ROSTREL=2, SP's spouse is male (ROSTSEX=1), proxy is not SP's spouse (ROSTREL^=2)

respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP has a spouse who is alive and living in the household (ROSTREL=2, SP's spouse is female (ROSTSEX=2), proxy is not SP's spouse (ROSTREL^=2)

er] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP has a partner who is alive and living in the household (ROSTREL=56, proxy is not SP's partner (ROSTREL^=56)

dent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) ident is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56)

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
PVCAR2	CO3A	SHOW CARD IA35 IA36 Please look at this card and tell me which is closest.	<ul> <li>(1) LESS THAN \$2,500</li> <li>(2) \$2,500 TO LESS THAN</li> <li>\$5,000</li> <li>(3) \$5,000 TO LESS THAN</li> <li>\$7,500</li> <li>(4) \$7,500 TO LESS THAN</li> <li>\$10,000</li> <li>(5) \$10,000 TO LESS THAN</li> <li>\$20,000</li> <li>(6) \$20,000 OR MORE</li> <li>(-8) DON'T KNOW</li> <li>(-9) REFUSED</li> </ul>	
FSINTRO1	FSINTRO1	These next questions are about the food eaten in [your/(SP)'s] household in the last 12 months, since [current month] of last year and whether [you were/he was/she was/they were] able to afford the food [you need/he needs/she needs/they need].		[your] respond [(SP)'s] respond [you were] respond [he was] respond [she was] respond [she was] respond [they were] respond [vou need] respond [she needs] respond [sh
FOODLAST	FS1	I'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 [current month]. The first statement is, The food that [I/we/(SP)/(SP) or other adults in (SP)'s household] bought just didn't last, and [I/we/he/she/they] didn't have money to get more. Was that often, sometimes, or never true for [you/your household/(SP)/(SP)'s household] in the last 12 months?	(1) OFTEN TRUE (2) SOMETIMES TRUE (3) NEVER TRUE (-8) DON'T KNOW (-9) REFUSED	live with SP (HH [you] responded [your househol [(SP)] responded [(SP)'s househol does not live w [I] respondent [We] responded [(SP)] responded [(SP) or other a greater than or [I] respondent [We] responded alone and SP is [he] responder [she] IF responded [they] responded [they] responded [they] responded [they] responded [they] responded [they] responded [they] responded [they] responded [(SP)] responded [(SP)] responded [(SP)] responded [(SP)] responded [(SP)] responded
FOODLAST_OFTEN	FS2	The next statement is: [I/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?         [IF 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 the last 12 months—that is, since last [current month].]	(1) OFTEN TRUE (2) SOMETIMES TRUE (3) NEVER TRUE (-8) DON'T KNOW (-9) REFUSED	[I] respondent [We] responde [(SP)] responde [(SP) or other a greater than or [you] responde [your househo [(SP)] responde [(SP)'s househo

ndent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy lives with SP (HHFLAG=1) ondent is proxy (SPPROXY=2), proxy does not live with SP (HHFLAG^=1) espondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy lives with SP (HHFLAG=1) pondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP lives alone (only SP has HHFLAG=1) spondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP lives alone (only SP has HHFLAG=1) respondent is proxy (SPPROXY=2), one or more persons live with SP (count of persons with HHFLAG is greater than one), proxy does not HHFLAG<sup>1</sup>=1) espondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy lives with SP (HHFLAG=1) espondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP lives alone (only SP has HHFLAG=1) espondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP lives alone (only SP has HHFLAG=1) espondent is proxy (SPPROXY=2), one or more persons live with SP (count of persons with HHFLAG=1 is greater than one), proxy does not HHFLAG<sup>1</sup>=1) dent is SP (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) nold] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy lives with SP (HHFLAG=1) dent is proxy (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) hold] respondent is proxy (SPPROXY=2), one or more persons live with SP (count of persons with HHFLAH=1 is greater than one), proxy with SP (HHFLAG^=1) nt is SP (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) dent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy lives with SP (HHFLAG=1) dent is proxy (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) r adults in (SP)'s household] respondent is proxy (SPPROXY=2), one or more persons live with SP (count of persons with HHFLAH=1 is one), proxy does not live with SP (HHFLAG<sup>1</sup>=1) nt is SP (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) dent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy lives with SP (HHFLAG=1) [he] IF SPPROXY = 2(proxy) and SP lives is male ent is proxy (SPPROXY=1), SP is male (ROSTSEX=1), SP lives alone (only SP has HHFLAG=1) ondent is proxy (SPPROXY=1), SP is female (ROSTSEX=2), SP lives alone (only SP has HHFLAG=1) ndent is proxy (SPPROXY=2), one or more persons live with SP (count of persons with HHFLAH=1 is greater than one), proxy does not live LAG^=1) dent is SP (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) nold] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy lives with SP (HHFLAG=1) dent is proxy (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) hold] respondent is proxy (SPPROXY=2), one or more persons live with SP (count of persons with HHFLAH=1 is greater than one), proxy with SP (HHFLAG^=1) nt is SP (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) dent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy lives with SP (HHFLAG=1) dent is proxy (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) r adults in (SP)'s household] respondent is proxy (SPPROXY=2), one or more persons live with SP (count of persons with HHFLAH=1 is one), proxy does not live with SP (HHFLAG<sup>+</sup>=1) dent is SP (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) nold] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy lives with SP (HHFLAG=1) dent is proxy (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) hold] respondent is proxy (SPPROXY=2), one or more persons live with SP (count of persons with HHFLAH=1 is greater than one), proxy with SP (HHFLAG^=1)

Variable Name	MR Screen	Question text/description	Code list	Text Fill Logic
	Name			
SKIPMEAL	FS3	In the last 12 months, since last (name of current month), did [you/you or other adults in	(1) YES	[you] responde
		your household/(SP)/((SP) or other adults in (SP)'s household] ever cut the size of		[you or other a
		[your/his/her/their] meals or skip meals because there wasn't enough money for food?	(-8) DON'T KNOW	greater than o
			(-9) REFUSED	[(SP)] respond
				[(SP) or other a
				greater than o
				[your] respond
				proxy (SPPROX
				[his] responder
				[her] responde
				[their] respond
				with SP (HHFLA
SKIPMEAL_OFTEN	FS3A	How often did this happen—almost every month, some months but not every month, or in	(1) ALMOST EVERY MONTH	
		only 1 or 2 months?	(2) SOME MONTHS BUT NOT	
			EVERY MONTH	
			(3) IN ONLY 1 OR 2 MONTHS	
			(-8) DON'T KNOW	
			(-9) REFUSED	
EATLESS	FS4	In the last 12 months, did [you/(SP)] ever eat less than [you/he/she] felt [you/he/she]	(1) YES	[you] responde
		should because there wasn't enough money for food?	(2) NO	[(SP)] responde
			(-8) DON'T KNOW	
			(-9) REFUSED	[you] responde
				[he] responder
				[she] responde
HUNGRY	FS5	In the last 12 months, [were you/was (SP)] ever hungry but didn't eat because there	(1) YES	[were you] res
		wasn't enough money for food?	(2) NO	[was (SP)] resp
			(-8) DON'T KNOW	
			(-9) REFUSED	

ident is SP (SPPROXY=1), SP lives alone (only SP has HHFLAG=1)

r adults in your household] respondent is SP (SPPROXY=1) and one or more persons live with SP (count of persons with HHFLAG=1 is one), or respondent is proxy (SPPROXY=2) and proxy lives with SP (HHFLAG=1)

dent is proxy (SPPROXY=2), SP lives alone (only SP has HHFLAG=1)

er adults in (SP)'s household] respondent is proxy (SPPROXY=2), one or more persons live with SP (count of persons with HHFLAG=1 is one), proxy does not live with SP (HHFLAG^=1)

ndent is SP (SPPROXY=1) and one or more persons live with SP (count of persons with HHFLAG=1 is greater than one), or respondent is DXY=2) and proxy lives with SP (HHFLAG=1)

dent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP lives alone (only SP has HHFLAG=1)

dent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP lives alone (only SP has HHFLAG=1)

ndent is proxy (SPPROXY=2), one or more persons live with SP (count of persons with HHFLAG=1 is greater than one), proxy does not live FLAG^=1)

ndent is SP (SPPROXY=1) ndent is proxy (SPPROXY=2)

ident is SP (SPPROXY=1) dent is proxy (SPPROXY=2), SP is male (ROSTSEX=1) ident is proxy (SPPROXY=2), SP is female (ROSTSEX=2) espondent is SP (SPPROXY=1) espondent is proxy (SPPROXY=2)