Income and Assets (IAQ)

Variable Name	MR Screen Name	Question type	Question text/description	Code list
LFINTRO1	LFINTRO1	no entry	Now I have some questions about 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
	BOX LFINTRO1	routing	If SPAISTATUS = 3 (Deceased in Community) or 4 (Deceased in Instititution), go to IAQ50 - TOTAL_COMBINED1. Otherwise, go to LIFINTRO2 - LFINTRO2.	
LFINTRO2	LFINTRO2	no entry	As the brochure explains, your responses to these questions can help us determine the impact of income on [your/his/her] use and access to health care. I will be asking a series of questions about [your/(SP's)/you and your (wife's/husband's/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
WORKWEEK	LF1	code one	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
RETNEVWK	LF1B	code one	Is this because [you were/(SP) was] retired or [you/(SP)] never worked?	(01) RETIRED (02) NEVER WORKED (03) NO, NEITHER OF THESE IS TRUE (-8) DON'T KNOW (-8) REFUSED
IAABSENT	LF2	code one	[Do you/Does (SP)] have a job from which [you were/(he/she) was] absent last week because of illness, vacation, or some other reason?	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED
WORKMONTH	LF3	code one	Now think about last month, that is [MONTH BEFORE INTERVIEW MONTH]. Did [you/(SP)] do any work for pay at any time in the last month?	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED
MULTIJOB	LF4	yes/no	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
HOURSPERWEEK	LF5	quantity unit	How many hours per week [do you/does (SP)] usually work at [your/his/her] [job/main job]? [By main job, I mean the job at which (you work/{he/she} works) the most hours.] ENTER NUMBER OF HOURS USUALLY WORK IF NUMBER OF HOURS VARY EACH WEEK, ENTER 997	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
	BOX LF1	routing	If LF2=1 (YES, ABSENT LAST WEEK), go to LF7. Otherwise, go to LF6.	
HOURSLASTWEEK1	LF6	quantity unit	How many hours did [you/(SP)] work last week? ENTER NUMBER OF HOURS	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED

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Variable Name	MR Screen Name	Question type	Question text/description	Code list
HOURSLASTWEEK2	LF7	quantity unit	You said [you were/(SP) was] absent from work last week. How many hours did [you/he/she] work the last week [you were/(he/she) was] at work? ENTER NUMBER OF HOURS	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
PAYSCHEDULE	LF8	code one	[Are you/Is (SP)/In (your/{SP}'s)] main job, [are you/is (he/she)] paid every week, every two weeks, two times a month, or on some other schedule?	(1) EVERY WEEK (2) EVERY TWO WEEKS (3) TWO TIMES A MONTH (4) ONCE A MONTH (5) DAILY (9) OTHER SCHEDULE (SPECIFY) (-8) DON'T KNOW (-9) REFUSED
OSPAYSCHEDULE	LF8A	verbatim	SPECIFY OTHER PAYMENT SCHEDULE	(1) [continuous response]
LASTPAYCHECK	LF9	code one	How much was [your/(SP)'s] last paycheck before taxes and any other deductions [for (your/his/her) main job]? IF NEEDED: We don't need an exact dollar amount. An approximate amount is fine. IF NEEDED: If it is easier, you can just tell me how much [you earn/(SP) earns] per hour or per day. 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 PAYCHECK AMOUNT (2) ENTER PAY PER HOUR (3) ENTER PAY PER DAY (-8) DON'T KNOW (-9) REFUSED
PAYCHECKAMT	LF9A	quantity unit	ENTER PAYCHECK AMOUNT $	(1) [continuous response]
PAYCHECKHOURLY	LF9B	quantity unit	ENTER PAY PER HOUR $	(1) [continuous response]
PAYCHECKDAILY	LF9C	quantity unit	ENTER PAY PER DAY $	(1) [continuous response]
MONTHPAY	LF10	quantity unit	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? 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. ENTER DOLLAR AMOUNT $	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
	BOX LF13	routing	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	code one	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

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Variable Name	MR Screen Name	Question type	Question text/description	Code list
SPOUSEEARN	LF14	quantity unit	In [CURRENT MONTH -1 MONTH], how much altogether did [you/your/(SP)'s] [husband/wife/partner] earn before taxes and before any other deductions? 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. ENTER DOLLAR AMOUNT $	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
IAOWNHOME	HO1	code one	Next, I'd like to ask you some questions about the [home/apartment or condo] [at SP's (ADDRESS 1, ADDRESS 2) from PERSON ROSTER]. [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?	(1) OWN (2) RENT (OR PAY MONTHLY AMOUNT) (3) SOME OTHER ARRANGEMENT (-8) DON'T KNOW (-9) REFUSED
MORTGAGE	HO2	code one	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
MORTGAGE_AMT1	HO3	quantity unit	How much altogether is that each month? ENTER DOLLAR AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
MORTGATE_AMT2	HO3A	code one	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.	(1) LESS THAN $250 (2) $250 TO LESS THAN $500 (3) $500 TO LESS THAN $1,000 (4) $1,000 TO LESS THAN $3,000 (5) $3,000 TO LESS THAN $5,000 (6) $5,000 OR MORE (-8) DON'T KNOW (-9) REFUSED
MORTGAGELGNTH	HO3B	code one	[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
MORTGAGEOWE1	HO3C	quantity unit	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	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
MORTGAGEOWE2	HO3D	code one	Is the amount owed…	(1) less than $50,000, (2) $50,000 to less than $100,000, or (3) $100,000 or more? (-8) DON'T KNOW (-9) REFUSED

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Variable Name	MR Screen Name	Question type	Question text/description	Code list
PRESENTVALUE1	HO4	quantity unit	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? IF NEEDED: Your best guess or 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. ENTER DOLLAR AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
PRESENTVALUE2	HO4A	code one	SHOW CARD IA2 Please look at this card and tell me which is closest.	(1) LESS THAN $50,000 (2) $50,000 TO LESS THAN $75,000 (3) $75,000 TO LESS THAN $100,000 (4) $100,000 TO LESS THAN $200,000 (5) $200,000 TO LESS THAN $300,000 (6) $300,000 TO LESS THAN $500,000 (7) $500,000 TO LESS THAN $750,000 (8) $750,000 OF MORE (-8) DON'T KNOW (-9) REFUSED
PAYRENT	HO5	yes/no	[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
RENTAMT1	HO6	quantity unit	How much is that each month? ENTER DOLLAR AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
RENTAMT2	HO6A	code one	SHOW CARD IA3 Please look at this card and tell me which is closest.	(1) LESS THAN $250 (2) $250 TO LESS THAN $500 (3) $500 TO LESS THAN $1,000 (4) $1,000 TO LESS THAN $3,000 (5) $3,000 TO LESS THAN $5,000 (6) $5,000 OR MORE (-8) DON'T KNOW (-9) REFUSED
	BOX HO1	routing	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	yes/no	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	no entry	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. Please feel free to refer to any records or other persons that may be of assistance in answering these questions. Many of these questions ask about "last month." By last month, I mean in [CURRENT MONTH – 1].	

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Variable Name	MR Screen Name	Question type	Question text/description	Code list
SSRR_LASTMONTH	IAQ1	code all	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, that is in [CURRENT MONTH –1]</u>? 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]	(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
	BOX IAQ1	routing	IF IAQ1 NE (1) SP PAYMENT THEN GO TO IAQ4, ELSE GO TO IAQ2	
SSDEPOSIT	IAQ2	code one	[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
MMSTARTSS	IAQ3	quantity unit	What month and year did [you/(SP)] start receiving Social Security? ENTER MONTH	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
YYSTARTSS	IAQ3	quantity unit	What month and year did [you/(SP)] start receiving Social Security? ENTER YEAR	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
SSI_LASTMONTH	IAQ4	code all	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
VA_LASTMONTH	IAQ5	code all	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
PENSION_LASTMONTH	IAQ6	code all	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]	(1) YES, SP HAS PENTION (2) YES, SPOUSE/PARTNER HAS PENSION (3) NO PENSIONS (-8) DON'T KNOW (-9) REFUSED

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Variable Name	MR Screen Name	Question type	Question text/description	Code list
401K_LASTMONTH	IAQ7	code all	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]	(1) YES, SP HAS 401K, 403B, IRA, OR OTHER RETIREMENT PLANS (2) YES, SPOUSE/PARTNER HAS 401K, 403B, IRA, OR OTHER RETIREMENT PLANS (3) NO PLANS (-8) DON'T KNOW (-9) REFUSED
MUTUALFUNDS	IAQ8	code all	[(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
BONDS	IAQ9	code all	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]	(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
CHECKING	IAQ10	code all	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?	(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
SAVINGS	IAQ11	code all	[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?	(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
CERTDEPOSIT	IAQ12	code all	[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?	(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
OTHER_LAND	IAQ13	code all	[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]	(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

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Variable Name	MR Screen Name	Question type	Question text/description	Code list
IAQINTRO2	IAQINTRO2	no entry	We now have a few questions about income which are important for understanding how people manage financially as they age.	
	BOX IAQ2	routing	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	code one	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])? 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
SSRR_COMBINED2	IAQ14A	quantity unit	ENTER COMBINED SP AND SPOUSE/PARTNER SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
SSRR_COMBINED3	IAQ14B	code one	SHOW CARD IA5 Please look at this card and tell me which is closest.	(1) LESS THAN $1,300 (2) $1,300 TO LESS THAN $1,700 (3) $1,700 TO LESS THAN $2,200 (3) $2,200 TO LESS THAN $2,600 (5) $2,600 OR MORE (-8) DON'T KNOW (-9) REFUSED
SSRR_SP_AMT1	IAQ15A	quantity unit	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. 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	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
SSRR_SP_AMT2	IAQ15B	code one	SHOW CARD IA6 Please look at this card and tell me which is closest.	(1) LESS THAN $700 (2) $700 TO LESS THAN $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	routing	If IAQ14 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ16A. Otherwise, go to BOX IAQ3.	
SSRR_SPOUSE_AMT1	IAQ16A	quantity unit	What was the amount of [your/(SPOUSE FIRSTNAME LASTNAME)'s/(PARTNER FIRSTNAME LASTNAME)'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. 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 SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED

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Variable Name	MR Screen Name	Question type	Question text/description	Code list
SSRR_SPOUSE_AMT2	IAQ16B	code one	SHOW CARD IA6 Please look at this card and tell me which is closest.	(1) LESS THAN $700 (2) $700 TO LESS THAN $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	routing	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	code one	What was the amount of [your/(SP)'s] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)]'s most recent monthly SSI 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
SSRR_COMBINED2	IAQ17A	quantity unit	ENTER COMBINED SP AND SPOUSE/PARTNER SSI AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
SSRR_COMBINED3	IAQ17B	code one	SHOW CARD IA7 Please look at this card and tell me which is closest.	(1) LESS THAN $300 (2) $300 TO LESS THAN $700 (3) $700 TO LESS THAN $1,000 (4) $1,000 OR MORE (-8) DON'T KNOW (-9) REFUSED
SSI_SP_AMT1	IAQ18A	quantity unit	What was the amount of [your/(SP)'s] most recent monthly SSI 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. ENTER SP SSI AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
SSI_SP_AMT2	IAQ18B	code one	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	routing	If IAQ17 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ19A. Otherwise, go to BOX IAQ4.	
SSI_SPOUSE_AMT3	IAQ19A	quantity unit	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])? 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 SSI AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED

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Variable Name	MR Screen Name	Question type	Question text/description	Code list
SSI_SPOUSE_AMT4	IAQ19B	code one	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 IAQ4	routing	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	code one	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
VA_AMT_COMBINED2	IAQ20A	quantity unit	ENTER COMBINED SP AND SPOUSE/PARTNER VA AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
VA_AMT_COMBINED3	IAQ20B	code one	SHOW CARD IA9 Please look at this card and tell me which is closest.	(1) LESS THAN $1,000 (2) $1,000 TO LESS THAN $1,400 (3) $1,400 TO LESS THAN $1,800 (4) $1,800 TO LESS THAN $2,200 (5) $2,200 OR MORE (-8) DON'T KNOW (-9) REFUSED
VA_SP_AMT1	IAQ21A	quantity unit	What was the amount of [your/(SP)'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. ENTER SP VA AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
VA_SP_AMT2	IAQ21B	code one	SHOW CARD IA10 Please look at this card and tell me which is closest.	(1) LESS THAN $500 (2) $500 TO LESS THAN $700 (3) $700 TO LESS THAN $900 (4) $900 TO LESS THAN $1,100 (5) $1,100 OR MORE (-8) DON'T KNOW (-9) REFUSED
	BOX IAQ4A	routing	If IAQ20 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ22A. Otherwise, go to BOX IAQ5.	

Income and Assets (IAQ)

Variable Name	MR Screen Name	Question type	Question text/description	Code list
VA_SPOUSE_AMT1	IAQ22A	quantity unit	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])? 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 VA AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
VA_SPOUSE_AMT2	IAQ22B	code one	SHOW CARD IA10 Please look at this card and tell me which is closest.	(1) LESS THAN $500 (2) $500 TO LESS THAN $700 (3) $700 TO LESS THAN $900 (4) $900 TO LESS THAN $1,100 (5) $1,100 OR MORE (-8) DON'T KNOW (-9) REFUSED
	BOX IAQ5	routing	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.	
PENSION_COMBINED1	IAQ23	code one	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.	(1) ENTER COMBINED AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED
PENSION_COMBINED2	IAQ23A	quantity unit	ENTER COMBINED SP AND SPOUSE/PARTNER PENSION PLAN AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
PENSION_COMBINED3	IAQ23B	code one	SHOW CARD IA11 Please look at this card and tell me which is closest.	(1) LESS THAN $600 (2) $600 TO LESS THAN $1,300 (3) $1,300 TO LESS THAN $2,100 (4) $2,100 TO LESS THAN $5,900 (5) $5,900 OR MORE (-8) DON'T KNOW (-9) REFUSED
PENSION_SP_AMT1	IAQ24A	quantity unit	[You told me earlier that (you have/{SP} has) a job-related pension plan.] In all, how much was received from [(your/{SP}'s) job-related/this] pension plan in the last month, before any federal or state taxes were taken out (for the month of [CURRENT MONTH – 1])? 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 PENSION PLAN AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED

Income and Assets (IAQ)

Variable Name	MR Screen Name	Question type	Question text/description	Code list
PENSION_SP_AMT2	IAQ24B	code one	SHOW CARD IA12 Please look at this card and tell me which is closest.	(1) LESS THAN $400 (2) $400 TO LESS THAN $900 (3) $900 TO LESS THAN $1,600 (4) $1,600 TO LESS THAN $3,800 (5) $3,800 OR MORE (-8) DON'T KNOW (-9) REFUSED
	BOX IAQ5A	routing	If IAQ23 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ25A. Otherwise, go to BOX IAQ6.	
PENSION_SPOUSE_AMT1	IAQ25A	quantity unit	[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])? 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 PENSION PLAN AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
PENSION_SPOUSE_AMT2	IAQ25B	code one	SHOW CARD IA12 Please look at this card and tell me which is closest.	(1) LESS THAN $400 (2) $400 TO LESS THAN $900 (3) $900 TO LESS THAN $1,600 (4) $1,600 TO LESS THAN $3,800 (5) $3,800 OR MORE (-8) DON'T KNOW (-9) REFUSED
	BOX IAQ6	routing	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	code one	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 currently in all of these retirement accounts? IF NEEDED: Retirement accounts include 401K, 403B, IRA, and other retirement accounts. IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how 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
401K_COMBINED2	IAQ26A	quantity unit	ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
401K_COMBINED3	IAQ26B	code one	SHOW CARD IA13 Please look at this card and tell me which is closest.	(1) LESS THAN $34,000 (2) $34,000 TO LESS THAN $82,000 (3) $82,000 TO LESS THAN $175,000 (4) $175,000 TO LESS THAN $413,000 (5) $413,000 OR MORE (-8) DON'T KNOW (-9) REFUSED

Income and Assets (IAQ)

Variable Name	MR Screen Name	Question type	Question text/description	Code list
401K_SP_AMT1	IAQ27A	quantity unit	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
401K_SP_AMT2	IAQ27B	code one	SHOW CARD IA14 Please look at this card and tell me which is closest.	(1) LESS THAN $20,000 (2) $20,000 TO LESS THAN $47,000 (3) $47,000 TO LESS THAN $92,000 (4) $92,000 TO LESS THAN $218,000 (5) $218,000 OR MORE (-8) DON'T KNOW (-9) REFUSED
	BOX IAQ6A	routing	If IAQ26 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ28A. Otherwise, go to BOX IAQ7.	
401K_SPOUSE_AMT1	IAQ28A	quantity unit	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. 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	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
401K_SPOUSE_AMT2	IAQ28B	code one	SHOW CARD IA14 Please look at this card and tell me which is closest.	(1) LESS THAN $20,000 (2) $20,000 TO LESS THAN $47,000 (3) $47,000 TO LESS THAN $92,000 (4) $92,000 TO LESS THAN $218,000 (5) $218,000 OR MORE (-8) DON'T KNOW (-9) REFUSED
	BOX IAQ7	routing	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	code one	<u>Last month</u>, how much altogether did [you/(SP)] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive or withdraw from all of these 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.	(1) ENTER COMBINED AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED
RECIEVE_COMBINED2	IAQ29A	quantity unit	ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED

Income and Assets (IAQ)

Variable Name	MR Screen Name	Question type	Question text/description	Code list
RECIEVE_COMBINED3	IAQ29B	code one	SHOW CARD IA15 Please look at this card and tell me which is closest.	(1) LESS THAN $200 (2) $200 TO LESS THAN $500 (3) $500 TO LESS THAN $1,000 (4) $1,000 TO LESS THAN $2,500 (5) $2,500 OR MORE (-8) DON'T KNOW (-9) REFUSED
RECEIVE_SP1	IAQ30A	quantity unit	<u>Last month</u>, how much altogether did [you/(SP)] 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 SP RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
RECEIVE_SP2	IAQ30B	code one	SHOW CARD IA16 Please look at this card and tell me which is closest.	(1) LESS THAN $100 (2) $100 TO LESS THAN $300 (3) $300 TO LESS THAN $700 (4) $700 TO LESS THAN $1,700 (5) $1,700 OR MORE (-8) DON'T KNOW (-9) REFUSED
	BOX IAQ7A	routing	If IAQ29 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ31A. Otherwise, go to BOX IAQ8.	
RECEIVE_SPOUSE1	IAQ31A	quantity unit	<u>Last month</u>, 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
RECEIVE_SPOUSE2	IAQ31B	code one	SHOW CARD IA16 Please look at this card and tell me which is closest.	(1) LESS THAN $100 (2) $100 TO LESS THAN $300 (3) $300 TO LESS THAN $700 (4) $700 TO LESS THAN $1,700 (5) $1,700 OR MORE (-8) DON'T KNOW (-9) REFUSED
	BOX IAQ8	routing	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.	
YRRECIEVE_COMBINED1	IAQ32	code one	Now thinking about all of <u>last year</u>, that is calendar year [CURRENT YEAR – 1], how much altogether did [you/(SP)] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive or withdraw from all of these 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.	(1) ENTER COMBINED AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED

Income and Assets (IAQ)

Variable Name	MR Screen Name	Question type	Question text/description	Code list
YRRECIEVE_COMBINED2	IAQ32A	quantity unit	ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
YRRECIEVE_COMBINED3	IAQ32B	code one	SHOW CARD IA17 Please look at this card and tell me which is closest.	(1) LESS THAN $2,400 (2) $2,400 TO LESS THAN $6,000 (3) $6,000 TO LESS THAN $12,000 (4) $12,000 TO LESS THAN $30,000 (5) $30,000 OR MORE (-8) DON'T KNOW (-9) REFUSED
YRRECEIVE_SP1	IAQ33A	quantity unit	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? 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	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
YRRECEIVE_SP2	IAQ33B	code one	SHOW CARD IA18 Please look at this card and tell me which is closest.	(1) LESS THAN $1,200 (2) $1,200 TO LESS THAN $3,600 (3) $3,600 TO LESS THAN $8,400 (4) $8,400 TO LESS THAN $20,400 (5) $20,400 OR MORE (-8) DON'T KNOW (-9) REFUSED
	BOX IAQ8A	routing	If IAQ32 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ34A. Otherwise, go to BOX IAQ9.	
YRRECEIVE_SPOUSE1	IAQ34A	quantity unit	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? 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
YRRECEIVE_SPOUSE2	IAQ34B	code one	SHOW CARD IA18 Please look at this card and tell me which is closest.	(1) LESS THAN $1,200 (2) $1,200 TO LESS THAN $3,600 (3) $3,600 TO LESS THAN $8,400 (4) $8,400 TO LESS THAN $20,400 (5) $20,400 OR MORE (-8) DON'T KNOW (-9) REFUSED
	BOX IAQ9	routing	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.	

Income and Assets (IAQ)

Variable Name	MR Screen Name	Question type	Question text/description	Code list
OTHER_COMBINED1	IAQ35	code one	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
OTHER_COMBINED2	IAQ35A	quantity unit	ENTER COMBINED SP AND SPOUSE'S/PARTNER'S MUTUAL FUNDS/STOCKS/BONDS AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
OTHER_COMBINED3	IAQ35B	code one	SHOW CARD IA19 Please look at this card and tell me which is closest.	(1) LESS THAN $9,000 (2) $9,000 TO LESS THAN $18,000 (3) $18,000 TO LESS THAN $93,000 (4) $93,000 TO LESS THAN $350,000 (5) $350,000 OR MORE (-8) DON'T KNOW (-9) REFUSED
	BOX IAQ9A	routing	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	code one	SHOW CARD IA20 Please look at this card and tell me which is closest.	(1) LESS THAN $600 (2) $600 TO LESS THAN $5,000 (3) $5,000 TO LESS THAN $16,000 (4) $16,000 TO LESS THAN $62,000 (5) $62,000 OR MORE (-8) DON'T KNOW (-9) REFUSED
OTHER_SP1	IAQ36A	quantity unit	You told me earlier that [you own/(SP) owns] [mutual funds or stocks] [government, corporate, or other bonds] that are not part of retirement accounts. About how much are these worth? 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	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
	BOX IAQ9B	routing	If IAQ8 = 1 (SP MUTUAL FUNDS), go to IAQ36B. Otherwise, go to IAQ36C.	
OTHER_SP2	IAQ36B	code one	SHOW CARD IA21 Please look at this card and tell me which is closest.	(1) LESS THAN $8,000 (2) $8,000 TO LESS THAN $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	code one	SHOW CARD IA22 Please look at this card and tell me which is closest.	(1) LESS THAN $300 (2) $300 TO LESS THAN $2,500 (3) $2,500 TO LESS THAN $8,000 (4) $8,000 TO LESS THAN $37,000 (5) $37,000 OR MORE (-8) DON'T KNOW (-9) REFUSED
	BOX IAQ9C	routing	If IAQ8 = 2 (SPOUSE MUTUAL FUNDS) or IAQ9 = 2 (SPOUSE BONDS), go to IAQ37A. Otherwise, go to BOX IAQ10.	

Income and Assets (IAQ)

Variable Name	MR Screen Name	Question type	Question text/description	Code list
OTHER_SPOUSE1	IAQ37A	quantity unit	You told me earlier that [you own/(SPOUSE FIRSTNAME LASTNAME) owns/(PARTNER FIRSTNAME LASTNAME) owns] [mutual funds or stocks] [government, corporate, or other bonds] that are not part of retirement accounts. About how much are these 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 SPOUSE'S/PARTNER'S MUTUAL FUNDS/STOCKS/BONDS AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
	BOX IAQ9D	routing	If IAQ8 = 2 (SPOUSE MUTUAL FUNDS), go to IAQ37B. Otherwise, go to IA37B.	
OTHER_SPOUSE2	IAQ37B	code one	SHOW CARD IA21 Please look at this card and tell me which is closest.	(1) LESS THAN $8,000 (2) $8,000 TO LESS THAN $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_SPOUSE3	IAQ37C	code one	SHOW CARD IA22 Please look at this card and tell me which is closest.	(1) LESS THAN $300 (2) $300 TO LESS THAN $2,500 (3) $2,500 TO LESS THAN $8,000 (4) $8,000 TO LESS THAN $37,000 (5) $37,000 OR MORE (-8) DON'T KNOW (-9) REFUSED
	BOX IAQ10	routing	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	code one	You told me earlier that [you/(SP)] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] have [checking accounts] [savings or money market accounts] [certificates of deposit or CDs]. 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])? 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
ACCTS_COMBINED2	IAQ38A	quantity unit	ENTER COMBINED SP AND SPOUSE'S/PARTNER'S ACCOUNTS TOTAL AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
	BOX IAQ10A	routing	If IAQ12 = [1 (SP CDs) and 2 (SPOUSE CDs)] or 3 (JOINT CDs), go to IAQ38B. Otherwise, go to IAQ38C.	

Income and Assets (IAQ)

Variable Name	MR Screen Name	Question type	Question text/description	Code list
ACCTS_SEPARATE1	IAQ38B	code one	SHOW CARD IA23 Please look at this card and tell me which is closest.	(1) LESS THAN $11,000 (2) $11,000 TO LESS THAN $25,000 (3) $25,000 TO LESS THAN $50,000 (4) $50,000 TO LESS THAN $108,000 (5) $108,000 OR MORE (-8) DON'T KNOW (-9) REFUSED
ACCTS_SEPARATE2	IAQ38C	code one	SHOW CARD IA24 Please look at this card and tell me which is closest.	(1) LESS THAN $2,000 (2) $2,000 TO LESS THAN $7,000 (3) $7,000 TO LESS THAN $17,000 (4) $17,000 TO LESS THAN $57,000 (5) $57,000 OR MORE (-8) DON'T KNOW (-9) REFUSED
ACCTS_SP1	IAQ39A	quantity unit	You told me earlier that [you have/(SP) has] [a checking account] [a savings or money market account] [certificates of deposit or CDs]. 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])? 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 ACCOUNTS TOTAL AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
	BOX IAQ10B	routing	If IAQ12 = 1 (SP CDs), go to IAQ39b. Otherwise, go to IAQ39c.	
ACCTS_SP2	IAQ39B	code one	SHOW CARD IA25 Please look at this card and tell me which is closest.	(1) LESS THAN $8,000 (2) $8,000 TO LESS THAN $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
ACCTS_SP3	IAQ39C	code one	SHOW CARD IA26 Please look at this card and tell me which is closest.	(1) LESS THAN $500 (2) $500 TO LESS THAN $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	routing	If IAQ10 = 2 (SPOUSE CHECKING) or IAQ11 = 2 (SPOUSE SAVINGS) or IAQ12 = 2 (SPOUSE CDS), go to IAQ40A. Otherwise, go to BOX IAQ11.	

Income and Assets (IAQ)

Variable Name	MR Screen Name	Question type	Question text/description	Code list
ACCTS_SPOUSE1	IAQ40A	quantity unit	You told me earlier that [you have/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME) has] [a checking account] [a savings or money market account] [certificates of deposit or CDs]. 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])? 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 ACCOUNTS TOTAL AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
	BOX IAQ10D	routing	If IAQ12 = 2 (SPOUSE CDS), go to IAQ40b. Otherwise, go to IAQ40c.	
ACCTS_SPOUSE2	IAQ40B	code one	SHOW CARD IA25 Please look at this card and tell me which is closest.	(1) LESS THAN $8,000 (2) $8,000 TO LESS THAN $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
ACCTS_SPOUSE3	IAQ40C	code one	SHOW CARD IA26 Please look at this card and tell me which is closest.	(1) LESS THAN $500 (2) $500 TO LESS THAN $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 IAQ11	routing	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 [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 IAQ41. Else if IAQ8 = 1 (SP MUTUAL FUNDS) or IAQ9 = 1 (SP BONDS) or IAQ10 = 1 (SP CHECKING) or IAQ11 = 1 (SP SAVINGS) or IAQ12 = 1 (SP CDS), go to IAQ42A. Else 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_COMBINED1	IAQ41	code one	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.	(1) ENTER COMBINED AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED
INTEREST_COMBINED2	IAQ41A	quantity unit	ENTER SP AND SPOUSE'S/PARTNER'S INTEREST AND DIVIDEND INCOME AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED

Income and Assets (IAQ)

Variable Name	MR Screen Name	Question type	Question text/description	Code list
INTEREST_COMBINED3	IAQ41B	code one	SHOW CARD IA27 Please look at this card and tell me which is closest.	(1) LESS THAN $200 (2) $200 TO LESS THAN $1,000 (3) $1,000 TO LESS THAN $4,000 (4) $4,000 TO LESS THAN $16,000 (5) $16,000 OR MORE (-8) DON'T KNOW (-9) REFUSED
INTEREST_SP1	IAQ42A	quantity unit	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]? 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 INTEREST AND DIVIDEND INCOME AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
INTEREST_SP2	IAQ42B	code one	SHOW CARD IA28 Please look at this card and tell me which is closest.	(1) LESS THAN $400 (2) $400 TO LESS THAN $1,000 (3) $1,000 TO LESS THAN $2,000 (4) $2,000 TO LESS THAN $11,000 (5) $11,000 OR MORE (-8) DON'T KNOW (-9) REFUSED
	BOX IAQ11A	routing	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	quantity unit	Now thinking about all of <u>last year</u>, that is calendar year [CURRENT YEAR – 1], how much interest and dividend income did [you/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] have altogether from [mutual funds or stocks] [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. ENTER SPOUSE/PARTNER INTEREST AND DIVIDEND INCOME AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
INTEREST_SPOUSE2	IAQ43B	code one	SHOW CARD IA28 Please look at this card and tell me which is closest.	(1) LESS THAN $400 (2) $400 TO LESS THAN $1,000 (3) $1,000 TO LESS THAN $2,000 (4) $2,000 TO LESS THAN $11,000 (5) $11,000 OR MORE (-8) DON'T KNOW (-9) REFUSED
	BOX IAQ12	routing	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.	

Income and Assets (IAQ)

Variable Name	MR Screen Name	Question type	Question text/description	Code list
LAND_COMBINED1	IAQ44	code one	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? 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
LAND_COMBINED2	IAQ44A	quantity unit	ENTER SP AND SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE COMBINED AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
LAND_COMBINED3	IAQ44B	code one	SHOW CARD IA29 Please look at this card and tell me which is closest.	(1) LESS THAN $30,000 (2) $30,000 TO LESS THAN $101,000 (3) $101,000 TO LESS THAN $247,000 (4) $247,000 TO LESS THAN $703,000 (5) $703,000 OR MORE (-8) DON'T KNOW (-9) REFUSED
LAND_SP1	IAQ45A	quantity unit	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. ENTER SP BUSINESS/FARM/REAL ESTATE AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
LAND_SP2	IAQ45B	code one	SHOW CARD IA30 Please look at this card and tell me which is closest.	(1) LESS THAN $18,000 (2) $18,000 TO LESS THAN $68,000 (3) $68,000 TO LESS THAN $122,000 (4) $122,000 TO LESS THAN $293,000 (5) $293,000 OR MORE (-8) DON'T KNOW (-9) REFUSED
	BOX IAQ12A	routing	If IAQ13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IAQ46A. Otherwise, go to BOX IAQ13.	
LAND_SPOUSE1		quantity unit	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	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
LAND_SPOUSE2	IAQ46B	code one	SHOW CARD IA30 Please look at this card and tell me which is closest.	(1) LESS THAN $18,000 (2) $18,000 TO LESS THAN $68,000 (3) $68,000 TO LESS THAN $122,000 (4) $122,000 TO LESS THAN $293,000 (5) $293,000 OR MORE (-8) DON'T KNOW (-9) REFUSED

Income and Assets (IAQ)

Variable Name	MR Screen Name	Question type	Question text/description	Code list
	BOX IAQ13	routing	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.	
INCOME_COMBINED1	IAQ47	code one	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.	(1) ENTER COMBINED AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED
INCOME_COMBINED2	IAQ47A	quantity unit	ENTER SP AND SPOUSE/PARTNER FROM BUSINESS/FARM/REAL ESTATE COMBINED AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
INCOME_COMBINED3	IAQ47B	code one	SHOW CARD IA31 Please look at this card and tell me which is closest.	(1) LESS THAN $3,600 (2) $3,600 TO LESS THAN $12,000 (3) $12,000 TO LESS THAN $25,000 (4) $25,000 TO LESS THAN $64,000 (5) $64,000 OR MORE (-8) DON'T KNOW (-9) REFUSED
INCOME_SP1	IAQ48A	quantity unit	Now thinking about all of last year, that is calendar year [CURRENT YEAR – 1], how much income did [you/(SP)] 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 BUSINESS/FARM/REAL ESTATE AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
INCOME_SP2	IAQ48B	code one	SHOW CARD IA32 Please look at this card and tell me which is closest.	(1) LESS THAN $3,600 (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
	BOX IAQ13A	routing	If IAQ3 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IAQ49A. Otherwise, go to IAQ50.	
INCOME_SPOUSE1	IAQ49A	quantity unit	Now thinking about all of last year, that is calendar year [CURRENT YEAR – 1], how much income did [you/(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 SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED

Income and Assets (IAQ)

Variable Name	MR Screen Name	Question type	Question text/description	Code list
INCOME_SPOUSE2	IAQ49B	code one	SHOW CARD IA32 Please look at this card and tell me which is closest.	(1) LESS THAN $3,600 (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	quantity unit	Now I want to ask about [your/(SP)'s] [and (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)'s] total income for last year, that is, for the calendar year ending in December [CURRENT YEAR - 1], before any federal or state taxes were taken out. Now think about that total income from: [Social Security or Railroad Retirement] [Supplemental Security Income] [the Veteran's Administration] [a pension plan] [any retirement accounts] [mutual funds or stocks] [bonds] [bank accounts] [CDs] [business, farm or real estate] [jobs] and from any other sources. How much was [your/(SP)'s] [and (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)'s] total income before taxes for last year (this is, for the 12 months ending in December [CURRENT YEAR - 1])? IF NEEDED: We don't need an exact dollar amount – the nearest $1,000 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. ENTER TOTAL INCOME FOR LAST YEAR. DO NOT INCLUDE LUMP SUM PAYMENTS RECEIVED FROM AN INHERITANCE, A TRUST FUND, AN INSURANCE SETTLEMENT, A PENSION SETTLEMENT, OR A GIFT.	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
	BOX IAQ13B	routing	If SPAISTATUS = 3 (Deceased in Community) or 4 (Deceased in Institution), go to BOX ENDIAQ. Otherwise, go to IAQ52-LUMP.	
	BOX IAQ14	routing	If SP has a spouse or partner who is living in the household (ROSTREL=2 or 65, HHFLAG=1), go to IAQ51A. Otherwise, go to IAQ51B.	
TOTAL_COMBINED2	IAQ51A	code one	SHOW CARD IA33 Please look at this card and tell me which is closest.	(1) LESS THAN $30,000 (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	code one	SHOW CARD IA34 Please look at this card and tell me which is closest.	(1) LESS THAN $18,000 (2) $18,000 TO LESS THAN $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
	BOX IAQ15	routing	If SPAISTATUS = 3 (Deceased in Community) or 4 (Deceased in Institution), go to BOX ENDIAQ. Otherwise, go to IAQ52-LUMP.	

Income and Assets (IAQ)

Variable Name	MR Screen Name	Question type	Question text/description	Code list
LUMP	IAQ52	code one	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
LUMPFORM	IAQ52A	code one	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?	(1) INSURANCE SETTLEMENT (2) PENSION SETTLEMENT (3) INHERITANCE (OR TRUST) (4) GIFT (5) LASWSUIT (91) OTHER (SPECIFY) (-8) DON'T KNOW (-9) REFUSED
LUMP_OTH	IAQ52A	verbatim text	OTHER (SPECIFY)	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED
LUMP_SUM1	IAQ52B	quantity unit	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
LUMP_SUM2	IAQ52C	code one	Did it amount to less than $50,000, more than $50,000, or what? DO NOT PROBE.	(1) LESS THAN $50K (2) ABOUT $50K (3) MORE THAN $50K (-8) DON'T KNOW (-9) REFUSED
OWNCAR	CO1	yes/no	Now, I would like to change topics and talk about automobiles [you own/(SP) owns] [or (your/his/her) (husband/wife/partner) owns]. [Do 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
NUMCAR	CO2	quantity unit	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
	BOX CO2	routing	If CO2 NE 2, go to CO3. Otherwise, go to FSINTRO1.	
PVCAR1	CO3	quantity unit	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
PVCAR2	CO3A	code one	SHOW CARD IA36 Please look at this card and tell me which is closest.	(1) LESS THAN $2,500 (2) $2,500 TO LESS THAN $5,000 (3) $5,000 TO LESS THAN $7,500 (4) $7,500 TO LESS THAN $10,000 (5) $10,000 TO LESS THAN $20,000 (6) $20,000 OR MORE (-8) DON'T KNOW (-9) REFUSED
FSINTRO1	FSINTRO1	no entry	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].	

Income and Assets (IAQ)

Variable Name	MR Screen Name	Question type	Question text/description	Code list
FOODLAST	FS1	code one	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
FOODLAST_OFTEN	FS2	code one	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
SKIPMEAL	FS3	code one	In the last 12 months, since last (name of current month), did [you/you or other adults in your household/(SP)/((SP) or other adults in (SP)'s household] ever cut the size of ~~your~~ [your/his/her/their] meals or skip meals because there wasn't enough money for food?	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED
SKIPMEAL_OFTEN	FS3A	code one	How often did this happen—almost every month, some months but not every month, or in only 1 or 2 months?	(1) ALMOST EVERY MONTH (2) SOME MONTHS BUT NOT EVERY MONTH (3) IN ONLY 1 OR 2 MONTHS (-8) DON'T KNOW (-9) REFUSED
EATLESS	FS4	code one	In the last 12 months, did [you/(SP)] ever eat less than [you/he/she] felt [you/he/she] should because there wasn't enough money for food?	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED
HUNGRY	FS5	code one	In the last 12 months, [were you/was (SP)] ever hungry but didn't eat because there wasn't enough money for food?	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED
	BOX ENDIAQ	routing	section end	