| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  | INCOME AND ASSETS QUESTIONNAIRE SPECIFICATIONS <br> CRITERIA <br> INTTYPE=C001, C002, C004, C005, C006, C010 <br> SPALIVE=ALL <br> SEASON=SUMMER <br> SPPROXY=SP or PROXY <br> Other: N/A <br> PLACEMENT <br> Administer after CPQ. |  |  |
| 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)]. <br> As with all information collected by the MCBS, the data are confidential and covered by the Privacy Act of 1974. Your answers will be combined with those of other respondents, and [your/his/her] Medicare benefits will not be affected in any way by your answers to these questions. <br> GIVE BROCHURE TO RESPONDENT. ALLOW A FEW MINUTES FOR RESPONDENT TO REVIEW BROCHURE IF NECESSARY. | (01) CONTINUE <br> (-7) Empty | BOX LFINTRO1 |
|  | BOX LFINTRO1 | routing | If SPAISTATUS $=3$ (Deceased in Community) or 4 (Deceased in Institutition), 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)]. <br> Please feel free to refer to any records or other persons who may be of assistance to you. | (01) CONTINUE <br> (-7) Empty | LF1 |
| 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 <br> (2) NO <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) LF4 <br> (2) LF1B <br> (-8) BOX LF13 <br> (-9) BOX LF13 |
| RETNEVWK | LF1B | code one | Is this because [you were/(SP) was] retired or [you/(SP)] never worked? | (01) RETIRED <br> (02) NEVER WORKED <br> (03) NO, NEITHER OF THESE IS TRUE <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX LF13 <br> (2) BOX LF13 <br> (3) LF2 <br> (-8) BOX LF13 <br> (-9) BOX LF13 |
| 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 <br> (2) NO <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) LF4 <br> (2) LF3 <br> (-8) BOX LF13 <br> (-9) BOX LF13 |


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| 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 <br> (2) NO <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) LF8 <br> (2) BOX LF13 <br> (-8) BOX LF13 <br> (-9) BOX LF13 |
| MULTIJOB | LF4 | yes/no | Last week, did [you/(SP)] have more than one job, including part-time, evening, or weekend work? | (1) YES <br> (2) NO <br> (-8) DON'T KNOW <br> (-9) REFUSED | LF5 |
| 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.] <br> ENTER NUMBER OF HOURS USUALLY WORK <br> IF NUMBER OF HOURS VARY EACH WEEK, ENTER 997 | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | $\begin{aligned} & (1) \text { BOX LF1 } \\ & (-8) \text { LF8 } \\ & (-9) \text { LF8 } \end{aligned}$ |
|  | 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? <br> ENTER NUMBER OF HOURS | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | $\begin{aligned} & (1) \text { LF8 } \\ & (-8) \text { LF8 } \\ & (-9) \text { LF8 } \end{aligned}$ |
| 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? <br> ENTER NUMBER OF HOURS | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | LF8 |
| PAYSCHEDULE | LF8 | code one | [Are you/ls (SP)/In (your/\{SP\}'s)] main job, [are youlis (he/she)] paid every week, every two weeks, two times a month, or on some other schedule? | (1) EVERY WEEK <br> (2) EVERY TWO WEEKS <br> (3) TWO TIMES A MONTH <br> (4) ONCE A MONTH <br> (5) DAILY <br> (91) OTHER SPECIFY <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) LF9 <br> (2) LF9 <br> (3) LF9 <br> (4) LF9 <br> (5) LF9 <br> (-8) LF9 <br> (-9) LF9 |
| OSPAYSCHEDULE | LF8A | verbatim | SPECIFY OTHER PAYMENT SCHEDULE | (1) [continuous response] | LF9 |
| LASTPAYCHECK | LF9 | code one | How much was [your/(SP)'s] last paycheck before taxes and any other deductions [for (your/his/her) main job]? <br> IF NEEDED: We don't need an exact dollar amount. An approximate amount is fine. <br> IF NEEDED: If it is easier, you can just tell me how much [you earn/(SP) earns] per hour or per day. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. | (1) ENTER PAYCHECK AMOUNT <br> (2) ENTER PAY PER HOUR <br> (3) ENTER PAY PER DAY <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) LF9A <br> (2) LF9B <br> (3) LF9C <br> (-8) BOX LF13 <br> (-9) BOX LF13 |


| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
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| PAYCHECKAMT | LF9A | quantity unit | ENTER PAYCHECK AMOUNT <br> \$ | (1) [continuous response] | LF10 |
| PAYCHECKHOURLY | LF9B | quantity unit | ENTER PAY PER HOUR $\$$ | (1) [continuous response] | LF10 |
| PAYCHECKDAILY | LF9C | quantity unit | ENTER PAY PER DAY \$ | (1) [continuous response] | LF10 |
| 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? <br> IF NEEDED: We don't need an exact dollar amount. An approximate amount is fine. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER DOLLAR AMOUNT <br> \$ | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX LF13 |
|  | 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 <br> (2) NO <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) LF14 <br> (2) HO 1 <br> (-8) HO1 <br> (-9) HO 1 |
| 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? <br> IF NEEDED: We don't need an exact dollar amount. An approximate amount is fine. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER DOLLAR AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | HO1 |
| IAOWNHOME | HO1 | code one | Next, I'd like to ask you some questions about the [home/apartment or condo] that is [your/(SP)'s] main residence. <br> [Do you/Does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER <br> FIRSTNAME LASTNAME)] own the [home/apartment or condo] rent it, or is there some other arrangement? | (1) OWN <br> (2) RENT (OR PAY MONTHLY AMOUNT) <br> (3) SOME OTHER ARRANGEMENT <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) HO 2 <br> (2) HO 6 <br> (3) HO 5 <br> (-8) HO 5 <br> (-9) HO5 |


| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
| :---: | :---: | :---: | :---: | :---: | :---: |
| 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? <br> IF NEEDED: Include any payments on a home equity loan or second mortgage. | (1) PAID OFF <br> (2) STILL MAKE PAYMENTS <br> (3) REVERSE MORTGAGE <br> (-8) DON'T KNOW <br> (-9) REFUSED | $\begin{aligned} & \text { (1) } \mathrm{HO} 4 \\ & \text { (2) } \mathrm{HO} \\ & \text { (3) HO4 } \\ & \text { (-8) HO4 } \\ & (-9) \mathrm{HO4} \end{aligned}$ |
| MORTGAGE_AMT1 | HO3 | quantity unit | How much altogether is that each month? <br> ENTER DOLLAR AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) HO3B <br> (-8) HO3A <br> (-9) HO3B |
| MORTGATE_AMT2 | H03A | code one | SHOW CARD IA1 <br> Please look at this card and tell me which is closest. <br> IF NEEDED: Include any payments on a home equity loan or second mortgage. | (1) LESS THAN $\$ 250$ <br> (2) $\$ 250$ TO LESS THAN $\$ 500$ <br> (3) $\$ 500$ TO LESS THAN $\$ 1,000$ <br> (4) $\$ 1,000$ TO LESS THAN $\$ 3,000$ <br> (5) $\$ 3,000$ TO LESS THAN $\$ 5,000$ <br> (6) $\$ 5,000$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | H03B |
| MORTGAGELGNTH | H03B | 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? <br> IF NEEDED: Include any payments on a home equity loan or second mortgage. | (1) WITHIN 5 YEARS <br> (2) WITHIN 10 YEARS <br> (3) LONGER THAN 10 YEARS <br> (-8) DON'T KNOW <br> (-9) REFUSED | HO3C |
| MORTGAGEOWE1 | H03C | quantity unit | About how much [do you/does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] still owe on the mortgage? <br> IF NEEDED: The nearest $\$ 10,000$ is fine. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> IF NEEDED: Include any payments on a home equity loan or second mortgage. <br> ENTER DOLLAR AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | $\begin{aligned} & \text { (1) HO4 } \\ & (-8) \text { HO3D } \\ & (-9) \text { HO4 } \end{aligned}$ |
| MORTGAGEOWE2 | HO3D | code one | Is the amount owed... | (1) less than $\$ 50,000$, <br> (2) $\$ 50,000$ to less than $\$ 100,000$, or <br> (3) $\$ 100,000$ or more? <br> (-8) DON'T KNOW <br> (-9) REFUSED | HO4 |
| 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? <br> IF NEEDED: Your best guess or the nearest $\$ 10,000$ is fine. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER DOLLAR AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) IAQINTRO1 <br> (-8) HO4A <br> (-9) IAQINTRO1 |


| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
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| PRESENTVALUE2 | H04A | code one | SHOW CARD IA2 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 50,000$ <br> (2) $\$ 50,000$ TO LESS THAN $\$ 75,000$ <br> (3) $\$ 75,000$ TO LESS THAN $\$ 100,000$ <br> (4) $\$ 100,000$ TO LESS THAN $\$ 200,000$ <br> (5) $\$ 200,000$ TO LESS THAN $\$ 300,000$ <br> (6) $\$ 300,000$ TO LESS THAN $\$ 500,000$ <br> (7) \$500,000 TO LESS THAN \$750,000 <br> (8) $\$ 750,000$ OF MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | IAQINTRO1 |
| 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 <br> (2) NO <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) HO 6 <br> (2) BOX HO 1 <br> (-8) BOX HO1 <br> (-9) BOX HO1 |
| RENTAMT1 | HO6 | quantity unit | How much is that each month? <br> ENTER DOLLAR AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | $\begin{aligned} & \text { (1) BOX HO1 } \\ & (-8) \text { HO6A } \\ & (-9) \text { HO6A } \end{aligned}$ |
| RENTAMT2 | H06A | code one | SHOW CARD IA3 <br> Please look at this card and tell me which is closest. | (1) LESS THAN \$250 <br> (2) $\$ 250$ TO LESS THAN $\$ 500$ <br> (3) $\$ 500$ TO LESS THAN $\$ 1,000$ <br> (4) $\$ 1,000$ TO LESS THAN $\$ 3,000$ <br> (5) $\$ 3,000$ TO LESS THAN $\$ 5,000$ <br> (6) $\$ 5,000$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX HO1 |
|  | 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 HO . |  |  |
| SECTION8 | HO7 | yes/no | Is this home in Section 8 or public housing or housing for low-income seniors? | (1) YES <br> (2) NO <br> (-8) DON'T KNOW <br> (-9) REFUSED | IAQINTRO1 |
| 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. <br> Please feel free to refer to any records or other persons that may be of assistance in answering these questions. <br> Many of these questions ask about "last month." By last month, I mean in [CURRENT MONTH - 1]. |  |  |
| 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 in the last month, that is in [CURRENT MONTH -1]? <br> 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. <br> [SELECT ALL THAT APPLY] | (1) YES, SP RECEIVED PAYMENT FROM SOURCE <br> (2) YES, SPOUSE/PARTNER RECEIVED <br> PAYMENT FROM <br> SOURCE <br> (3) NO PAYMENT RECEIVED FROM THIS <br> SOURCE <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ1 <br> (2) BOX IAQ1 <br> (3) IAQ4 <br> (-8) IAQ4 <br> (-9) IAQ4 |


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|  | 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 <br> (2) DIRECT DEPOSIT <br> (3) PREPAID CARD <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ1A |
|  | BOX IAQ1A | routing | IF SP HAS EVER REPORTED THE MONTH AND YEAR THEY STARTED RECEIVING SOCIAL SECURITY (P_ MSTRTSOC $\wedge=$, DK, or R AND P_YSTRTSOC ^=., DK, or R), GO TO IAQ4- SSI_LASTMONTH ELSE GO TO IAQ3- MSTRTSOC |  |  |
| MSTRTSOC | IAQ3 | quantity unit | What month and year did [you/(SP)] start receiving Social Security? <br> [ENTER MONTH AND YEAR] | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | IAQ3-YSTRTSOC |
| YSTRTSOC | IAQ3 | quantity unit | What month and year did [you/(SP)] start receiving Social Security? [ENTER MONTH AND YEAR] | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | IAQ4-SSI_LASTMONTH |
| 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, last month? <br> IF NEEDED: These are monthly government payments to lower-income people in need. <br> [SELECT ALL THAT APPLY] | (1) YES, SP RECEIVED PAYMENT FROM SOURCE <br> (2) YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE <br> (3) NO PAYMENT RECEIVED FROM THIS SOURCE <br> (-8) DON'T KNOW <br> (-9) REFUSED | IAQ5 |
| VA_LASTMONTH | IAQ5 | code all | Did [youl(SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive any payments from the Veteran's Administration, last month related to military service or veteran survivor's benefits? <br> [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 <br> (2) YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE <br> (3) NO PAYMENT RECEIVED FROM THIS source <br> (-8) DON'T KNOW <br> (-9) REFUSED | IAQ6 |
| PENSION_LASTMONTH | IAQ6 | code all | People sometimes receive retirement income from other sources, such as pensions. <br> [Do you/Does (SP)] [or (SP FIRSTNAME LASTNAME/SPOUSE FIRSTNAME LASTNAME/PARTNER FIRSTNAME LASTNAME)] receive income from any pension plans that were a job-related or union benefit? <br> IF NEEDED: These plans often require that a person work for a certain number of years before they qualify or "are vested" in the pension plan. <br> IF NEEDED: Are you currently receiving income from the pension plan? <br> SELECT "YES" ONLY IF THE RESPONDENT IS CURRENTLY RECEIVING INCOME FROM THE PENSION PLAN. <br> [SELECT ALL THAT APPLY] | (1) YES, SP RECEIVED PAYMENT FROM PENSION <br> (2) YES, SPOUSE/PARTNER RECEIVED <br> PAYMENT FROM PENSION <br> (3) NO PAYMENT RECEIVED FROM PENSIONS <br> (-8) DON'T KNOW <br> (-9) REFUSED | IAQ7 |


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| 401K_LASTMONTH | IAQ7 | code all | SHOW CARD IA4 <br> These next questions are a bit different and ask about assets [you/(SP)] [or (SP FIRSTNAME LASTNAME/SPOUSE FIRSTNAME LASTNAME/PARTNER FIRSTNAME LASTNAME)] might own or contribute to, such as retirement plans, mutual funds, and bonds. <br> 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? <br> IF NEEDED: 401Ks and 403Bs are plans where you contribute an amount each month from your paycheck, and your employer may match some of your contribution. <br> IF NEEDED: IRAs, also known as Individual Retirement Accounts, are a type of plan you set up on your own. <br> [SELECT ALL THAT APPLY] | (1) YES, SP HAS 401K, 403B, IRA, OR OTHER RETIREMENT PLANS <br> (2) YES, SPOUSE/PARTNER HAS 401K, 403B, IRA, OR <br> OTHER RETIREMENT PLANS <br> (3) NO PLANS <br> (-8) DON'T KNOW <br> (-9) REFUSED | IAQ8 |
| 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? <br> [SELECT ALL THAT APPLY] | (1) YES, SP HAS ASSET <br> (2) YES, SPOUSE/PARTNER HAS ASSET <br> (3) YES, SP AND SPOUSE/PARTNER HAVE <br> ASSET JOINTLY <br> (4) NO ASSET OF THIS TYPE <br> (-8) DON'T KNOW <br> (-9) REFUSED | IAQ9 |
| 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? <br> [SELECT ALL THAT APPLY] | (1) YES, SP HAS ASSET <br> (2) YES, SPOUSEIPARTNER HAS ASSET <br> (3) YES, SP AND SPOUSE/PARTNER HAVE <br> ASSET JOINTLY <br> (4) NO ASSET OF THIS TYPE <br> (-8) DON'T KNOW <br> (-9) REFUSED | IAQ10 |
| CHECKING | IAQ10 | code all | The next questions ask about different kinds of bank or savings accounts people sometimes have or property they own. <br> Not counting what we've already talked about, [do you/does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] have... <br> A checking account? | (1) YES, SP HAS ASSET <br> (2) YES, SPOUSE/PARTNER HAS ASSET <br> (3) YES, SP AND SPOUSE/PARTNER HAVE <br> ASSET JOINTLY <br> (4) NO ASSET OF THIS TYPE <br> (-8) DON'T KNOW <br> (-9) REFUSED | IAQ11 |
| 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...] <br> A savings account or money market account? | (1) YES, SP HAS ASSET <br> (2) YES, SPOUSE/PARTNER HAS ASSET <br> (3) YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY <br> (4) NO ASSET OF THIS TYPE <br> (-8) DON'T KNOW <br> (-9) REFUSED | IAQ12 |
| 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...] <br> Certificates of deposit? | (1) YES, SP HAS ASSET <br> (2) YES, SPOUSE/PARTNER HAS ASSET <br> (3) YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY <br> (4) NO ASSET OF THIS TYPE <br> (-8) DON'T KNOW <br> (-9) REFUSED | IAQ13 |


| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
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| 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? <br> [SELECT ALL THAT APPLY] | (1) YES, SP HAS ASSET <br> (2) YES, SPOUSE/PARTNER HAS ASSET <br> (3) YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY <br> (4) NO ASSET OF THIS TYPE <br> (-8) DON'T KNOW <br> (-9) REFUSED | IAQINTRO2 |
| 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 |
|  | BOX IAQ2 | routing | If IAQ1 $=1$ (SP RECEIVED SS/RR) and 2 (SPOUSE RECEIVED SS/RR), go to IAQ14. <br> Else if IA1 = 1 (SP RECEIVED SS/RR), go to IAQ15A. <br> Else if IA1 = 2 (SPOUSE RECEIVED SS/RR), go to IAQ16A. <br> 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])? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. | (1) ENTER COMBINED AMOUNT <br> (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS <br> SEPARATELY <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) IAQ14A <br> (2) IAQ15A <br> (-8) IAQ14B <br> (-9) IAQ14B |
| SSRR_COMBINED2 | IAQ14A | quantity unit | ENTER COMBINED SP AND SPOUSE/PARTNER SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOXIAQ3 <br> (-8) IAQ14B <br> (-9) IAQ14B |
| SSRR_COMBINED3 | IAQ14B | code one | SHOW CARD IA5 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 1,300$ <br> (2) $\$ 1,300$ TO LESS THAN $\$ 1,700$ <br> (3) $\$ 1,700$ TO LESS THAN $\$ 2,200$ <br> (3) $\$ 2,200$ TO LESS THAN $\$ 2,600$ <br> (5) $\$ 2,600$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ3 |
| 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])? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SP SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ2A <br> (-8) IAQ15B <br> (-9) IAQ15B |
| SSRR_SP_AMT2 | IAQ15B | code one | SHOW CARD IA6 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 700$ <br> (2) $\$ 700$ TO LESS THAN $\$ 1,000$ <br> (3) $\$ 1,000$ TO LESS THAN $\$ 1,300$ <br> (4) $\$ 1,300$ TO LESS THAN $\$ 1,600$ <br> (5) $\$ 1,600$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOXIAQ2A |
|  | BOX IAQ2A | routing | If IAQ14 $=2$ (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ16A. Otherwise, go to BOX IAQ3. |  |  |


| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
| :---: | :---: | :---: | :---: | :---: | :---: |
| 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])? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SPOUSE/PARTNER SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ3 <br> (-8) IAQ16B <br> (-9) IAQ16B |
| SSRR_SPOUSE_AMT2 | IAQ16B | code one | SHOW CARD IA6 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 700$ <br> (2) $\$ 700$ TO LESS THAN $\$ 1,000$ <br> (3) $\$ 1,000$ TO LESS THAN $\$ 1,300$ <br> (4) $\$ 1,300$ TO LESS THAN $\$ 1,600$ <br> (5) $\$ 1,600$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ3 |
|  | BOX IAQ3 | routing | If IAQ4 $=1$ (SP RECEIVED SSI) and 2 (SPOUSE RECEIVED SSI), go to IAQ17. <br> Else if IAQ4 = 1 (SP RECEIVED SSI), go to IAQ18A. <br> EIse if IAQ4 = 2 (SPOUSE RECEIVED SSI), go to IAQ19A. <br> Otherwise, go to BOX IAQ4 |  |  |
| IAQ17_SSI_COMBINED | 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])? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. | (1) ENTER COMBINED AMOUNT <br> (2) ENTER SP AND SPOUSE/PARTNER <br> AMOUNTS <br> SEPARATELY <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) IAQ17A (2) IAQ18A (-8) IAQ17B (-9) (-9) IAQ17B |
| IAQ17A_SSI_COMBINED | IAQ17A | quantity unit | ENTER COMBINED SP AND SPOUSE/PARTNER SSI AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOXIAQ4 <br> (-8) IAQ17B <br> (-9) IAQ17B |
| IAQ17B_SSI_COMBINED | IAQ17B | code one | SHOW CARD IA7 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 300$ <br> (2) $\$ 300$ TO LESS THAN $\$ 700$ <br> (3) $\$ 700$ TO LESS THAN $\$ 1,000$ <br> (4) $\$ 1,000$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ4 |
| 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])? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SP SSI AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ3A <br> (-8) IAQ18B <br> (-9) IAQ18B |
| SSI_SP_AMT2 | IAQ18B | code one | SHOW CARD IA8 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 100$ <br> (2) $\$ 100$ TO LESS THAN $\$ 200$ <br> (3) $\$ 200$ TO LESS THAN $\$ 400$ <br> (4) $\$ 400$ TO LESS THAN $\$ 700$ <br> (5) $\$ 700$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ3A |


| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | BOXIAQ3A | 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])? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SPOUSE/PARTNER SSI AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ4 <br> (-8) IAQ19B <br> (-9) IAQ19B |
| SSI_SPOUSE_AMT4 | IAQ19B | code one | SHOW CARD IA8 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 100$ <br> (2) $\$ 100$ TO LESS THAN $\$ 200$ <br> (3) $\$ 200$ TO LESS THAN $\$ 400$ <br> (4) $\$ 400$ TO LESS THAN $\$ 700$ <br> (5) $\$ 700$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ4 |
|  | BOX IAQ4 | routing | If IAQ5 $=1$ (SP RECEIVED VA) and 2 (SPOUSE RECEIVED VA), go to IAQ20. <br> Else if IAQ5 = 1 (SP RECEIVED VA), go to IA21A. <br> Else if IAQ5 $=2$ (SPOUSE RECEIVED VA), go to IAQ22A. <br> 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 <br> LASTNAME)(PARTNER FIRSTNAME LASTNAME)]'s most recent monthly Veteran's Administration payment (for the month of [CURRENT MONTH - 1])? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficiclt 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 <br> (2) ENTER SP AND SPOUSE/PARTNER <br> AMOUNTS <br> SEPARATELY <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) IAQ20A (2) IAQ21A (-8) IAQ20B (-9) IAQ20B |
| VA_AMT_COMBINED2 | IAQ20A | quantity unit | ENTER COMBINED SP AND SPOUSE/PARTNER VA AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ5 <br> (-8) IAQ20B <br> (-9) IAQ20B |
| VA_AMT_COMBINED3 | IAQ20B | code one | SHOW CARD IA9 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 1,000$ <br> (2) $\$ 1,000$ TO LESS THAN $\$ 1,400$ <br> (3) $\$ 1,400$ TO LESS THAN $\$ 1,800$ <br> (4) $\$ 1,800$ TO LESS THAN $\$ 2,200$ <br> (5) $\$ 2,200$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ5 |
| 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])? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SP VA AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ4A <br> (-8) IAQ21B <br> (-9) IAQ21B |


| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
| :---: | :---: | :---: | :---: | :---: | :---: |
| VA_SP_AMT2 | IAQ21B | code one | SHOW CARD IA10 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 500$ <br> (2) $\$ 500$ TO LESS THAN $\$ 700$ <br> (3) $\$ 700$ TO LESS THAN $\$ 900$ <br> (4) $\$ 900$ TO LESS THAN $\$ 1,100$ <br> (5) $\$ 1,100$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ4A |
|  | BOX IAQ4A | routing | If IAQ20 $=2$ (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ22A. Otherwise, go to BOX IAQ5. |  |  |
| 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])? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SPOUSE/PARTNER VA AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ5 <br> (-8) IAQ22B <br> (-9) IAQ22B |
| VA_SPOUSE_AMT2 | IAQ22B | code one | SHow CARD IA10 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 500$ <br> (2) $\$ 500$ TO LESS THAN $\$ 700$ <br> (3) $\$ 700$ TO LESS THAN $\$ 900$ <br> (4) $\$ 900$ TO LESS THAN $\$ 1,100$ <br> (5) \$1,100 OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ5 |
|  | BOX IAQ5 | routing | If IAQ6 $=1$ (SP RECEIVED PENSION PLAN) and 2 (SPOUSE RECEIVED PENSION PLAN), go to IAQ23. <br> Else if IAQ6 $=1$ (SP RECEIVED PENSION PLAN), go to IAQ24A. <br> Else if $\operatorname{IAQ6}=2$ (SPOUSE RECEIVED PENSION PLAN), go to IAQ25A. <br> Otherwise, go to BOX IAQ6. |  |  |
| PENSION_COMBINED1 | IAQ23 | code one | You told me earlier that [you/(SP)] and [(\{SP FIRSTNAME LASTNAME\}//SPOUSE FIRSTNAME <br> 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])? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. | (1) ENTER COMBINED AMOUNT <br> (2) ENTER SP AND SPOUSE/PARTNER <br> AMOUNTS <br> SEPARATELY <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) IAQ23A (2) IAQ24A (-8) IAQ23B (-9) IAQ23B |
| PENSION_COMBINED2 | IAQ23A | quantity unit | ENTER COMBINED SP AND SPOUSE/PARTNER PENSION PLAN AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOXIAQ6 <br> (-8) IAQ23B <br> (-9) IAQ23B |
| PENSION_COMBINED3 | IAQ23B | code one | SHOW CARD IA11 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 600$ <br> (2) $\$ 600$ TO LESS THAN $\$ 1,300$ <br> (3) $\$ 1,300$ TO LESS THAN $\$ 2,100$ <br> (4) $\$ 2,100$ TO LESS THAN $\$ 5,900$ <br> (5) \$5,900 OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ6 |


| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
| :---: | :---: | :---: | :---: | :---: | :---: |
| 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])? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SP PENSION PLAN AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ5A <br> (-8) IAQ24B <br> (-9) IAQ24B |
| PENSION_SP_AMT2 | IAQ24B | code one | SHOW CARD IA12 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 400$ <br> (2) $\$ 400$ TO LESS THAN $\$ 900$ <br> (3) $\$ 900$ TO LESS THAN $\$ 1,600$ <br> (4) $\$ 1,600$ TO LESS THAN $\$ 3,800$ <br> (5) $\$ 3,800$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ5A |
|  | BOX IAQ5A | routing | If IAQ23 $=2$ (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ25A. Otherwise, go to BOX IAQ6. |  |  |
| $\underset{\text { T1 }}{\text { PENSION_SPOUSE_AM }}$ | 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 <br> 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])? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SPOUSE/PARTNER PENSION PLAN AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ6 <br> (-8) IAQ25B <br> (-9) IAQ25B |
| $\underset{\text { T2 }}{\text { PENSION_SPOUSE_AM }}$ | IAQ25B | code one | SHOW CARD IA12 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 400$ <br> (2) $\$ 400$ TO LESS THAN $\$ 900$ <br> (3) $\$ 900$ TO LESS THAN $\$ 1,600$ <br> (4) $\$ 1,600$ TO LESS THAN $\$ 3,800$ <br> (5) $\$ 3,800$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ6 |
|  | 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. <br> Else if IAQ7 $=2$ (SPOUSE HAS RETIREMENT ACCT), go to IAQ28A. <br> 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? <br> IF NEEDED: Retirement accounts include $401 \mathrm{~K}, 403 \mathrm{~B}$, IRA, and other retirement accounts. <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. | (1) ENTER COMBINED AMOUNT <br> (2) ENTER SP AND SPOUSE/PARTNER <br> AMOUNTS <br> SEPARATELY <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) IAQ26A (2) IAQ27A <br> (-8) IAQ26B <br> (-9) IAQ26B |


| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
| :---: | :---: | :---: | :---: | :---: | :---: |
| 401K_COMBINED2 | IAQ26A | quantity unit | ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ7 <br> (-8) IAQ26B <br> (-9) IAQ26B |
| 401K_COMBINED3 | IAQ26B | code one | SHOW CARD IA13 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 34,000$ <br> (2) $\$ 34,000$ TO LESS THAN $\$ 82,000$ <br> (3) $\$ 82,000$ TO LESS THAN $\$ 175,000$ <br> (4) $\$ 175,000$ TO LESS THAN $\$ 413,000$ <br> (5) $\$ 413,000$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ7 |
| 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 currently in all of these retirement accounts? <br> IF NEEDED: Retirement accounts include $401 \mathrm{~K}, 403 \mathrm{~B}$, IRA and other retirement accounts. <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SP RETIREMENT ACCOUNT AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ6A <br> (-8) IAQ27B <br> (-9) IAQ27B |
| 401K_SP_AMT2 | IAQ27B | code one | SHOW CARD IA14 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 20,000$ <br> (2) $\$ 20,000$ TO LESS THAN $\$ 47,000$ <br> (3) $\$ 47,000$ TO LESS THAN $\$ 92,000$ <br> (4) $\$ 92,000$ TO LESS THAN $\$ 218,000$ <br> (5) $\$ 218,000$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ6A |
|  | 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 <br> LASTNAME $\}$ \{PARTNER FIRSTNAME LASTNAME\} has)] retirement accounts. In total, about how much is currently in all of these retirement accounts? <br> IF NEEDED: Retirement accounts include 401K, 403B, IRA and other retirement accounts. <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SPOUSE/PARTNER RETIREMENT ACCOUNT AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ7 $(-8)$ IAQ28B $(-9)$ IAQ28B |
| 401K_SPOUSE_AMT2 | IAQ28B | code one | SHOW CARD IA14 <br> Please look at this card and tell me which is closest. | (1) LESS THAN \$20,000 <br> (2) $\$ 20,000$ TO LESS THAN $\$ 47,000$ <br> (3) $\$ 47,000$ TO LESS THAN $\$ 92,000$ <br> (4) $\$ 92,000$ TO LESS THAN $\$ 218,000$ <br> (5) $\$ 218,000$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ7 |
|  | BOX IAQ7 | routing | If IAQ7 $=1$ (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IAQ29. <br> Else if IAQ7 = 1 (SP HAS RETIREMENT ACCT), go to IAQ30A. <br> Else if IAQ7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to IAQ31A. <br> Otherwise, go to BOX IAQ8. |  |  |


| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
| :---: | :---: | :---: | :---: | :---: | :---: |
| RECIEVE_COMBINED1 | IAQ29 | code one | Last month, 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])? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. | (1) ENTER COMBINED AMOUNT <br> (2) ENTER SP AND SPOUSE/PARTNER <br> AMOUNTS <br> SEPARATEly <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) IAQ29A (2) IAQ30A $(-8) / A Q 29 B$ $(-9) / A Q 29 B$ (-9) IAQ29B |
| RECIEVE_COMBINED2 | IAQ29A | quantity unit | ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOXIAQ8 <br> (-8) IAQ29B <br> (-9) IAQ29B |
| RECIEVE_COMBINED3 | IAQ29B | code one | SHOW CARD IA15 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 200$ <br> (2) $\$ 200$ TO LESS THAN $\$ 500$ <br> (3) $\$ 500$ TO LESS THAN $\$ 1,000$ <br> (4) $\$ 1,000$ TO LESS THAN $\$ 2,500$ <br> (5) \$2,500 OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ8 |
| RECEIVE_SP1 | IAQ30A | quantity unit | Last month, how much altogether did [you/(SP)] receive or withdraw from [your/his/her] retirement accounts (for the month of [CURRENT MONTH - 1])? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SP RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ7A <br> (-8) IAQ30B <br> (-9) IAQ30B |
| RECEIVE_SP2 | IAQ30B | code one | SHOW CARD IA16 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 100$ <br> (2) $\$ 100$ TO LESS THAN $\$ 300$ <br> (3) $\$ 300$ TO LESS THAN $\$ 700$ <br> (4) $\$ 700$ TO LESS THAN $\$ 1,700$ <br> (5) $\$ 1,700$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ7A |
|  | 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 | 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])? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ8 <br> (-8) IAQ31B <br> (-9) IAQ31B |


| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
| :---: | :---: | :---: | :---: | :---: | :---: |
| RECEIVE_SPOUSE2 | IAQ31B | code one | SHOW CARD IA16 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 100$ <br> (2) $\$ 100$ TO LESS THAN $\$ 300$ <br> (3) $\$ 300$ TO LESS THAN $\$ 700$ <br> (4) $\$ 700$ TO LESS THAN $\$ 1,700$ <br> (5) $\$ 1,700$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ8 |
|  | BOX IAQ8 | routing | If IAQ7 $=1$ (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IAQ32. <br> Else if IAQ7 = 1 (SP HAS RETIREMENT ACCT), go to IAQ33A. <br> Else if IAQ7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to IAQ34A. <br> Otherwise, go to BOX IAQ9. |  |  |
| YRRECIEVE_COMBINED 1 | IAQ32 | code one | Now thinking about all of last year, that is calendar year [CURRENT YEAR - 1], how much altogether did [you/(SP)] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive or withdraw from all of these retirement accounts? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. | (1) ENTER COMBINED AMOUNT <br> (2) ENTER SP AND SPOUSE/PARTNER <br> AMOUNTS <br> SEPARATELY <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) IAQ32A <br> (2) IAQ33A <br> (-8) IAQ32B <br> (-9) IAQ32B |
| YRRECIEVE_COMBINED | IAQ32A | quantity unit | ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ9 <br> (-8) IAQ32B <br> (-9) IAQ32B |
| YRRECIEVE_COMBINED | IAQ32B | code one | SHOW CARD IA17 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 2,400$ <br> (2) $\$ 2,400$ TO LESS THAN $\$ 6,000$ <br> (3) $\$ 6,000$ TO LESS THAN $\$ 12,000$ <br> (4) $\$ 12,000$ TO LESS THAN $\$ 30,000$ <br> (5) \$30,000 OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ9 |
| YRRECEIVE_SP1 | IAQ33A | quantity unit | Now thinking about all of last year, that is calendar year [CURRENT YEAR - 1], how much altogether did [you/(SP)] receive or withdraw from all of [your/his/her] retirement plans? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SP RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ8A <br> (-8) IAQ33B <br> (-9) IAQ33B |
| YRRECEIVE_SP2 | IAQ33B | code one | SHOW CARD IA18 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 1,200$ <br> (2) $\$ 1,200$ TO LESS THAN $\$ 3,600$ <br> (3) $\$ 3,600$ TO LESS THAN $\$ 8,400$ <br> (4) $\$ 8,400$ TO LESS THAN $\$ 20,400$ <br> (5) $\$ 20,400$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ8A |
|  | BOX IAQ8A | routing | If IAQ32 $=2$ (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ34A. Otherwise, go to BOX IAQ9. |  |  |


| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
| :---: | :---: | :---: | :---: | :---: | :---: |
| YRRECEIVE_SPOUSE1 | IAQ34A | quantity unit | Now thinking about all of last year, 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? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ9 <br> (-8) IAQ34B <br> (-9) IAQ34B |
| YRRECEIVE_SPOUSE2 | IAQ34B | code one | SHOW CARD IA18 <br> Please look at this card and tell me which is closest. | (1) LESS THAN \$1,200 <br> (2) $\$ 1,200$ TO LESS THAN $\$ 3,600$ <br> (3) $\$ 3,600$ TO LESS THAN $\$ 8,400$ <br> (4) $\$ 8,400$ TO LESS THAN $\$ 20,400$ <br> (5) \$20,400 OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ9 |
|  | BOX IAQ9 | routing | If [IAQ8 = 1 (SP MUTUAL FUNDS) and IAQ8 $=2$ (SPOUSE MUTUAL FUNDS)] or IAQ8 $=3$ (JOINT MUTUAL <br> FUNDS) or [IAQ9 = 1 (SP BONDS) and IAQ9 = 2 (SPOUSE BONDS)] or IAQ9 = 3 (JOINT BONDS), go to IAQ35. <br> Else if IAQ8 = 1 (SP MUTUAL FUNDS) or IAQ9 = 1 (SP BONDS), go to IAQ36A. <br> Else if IAQ8 = 2 (SPOUSE MUTUAL FUNDS) or IAQ9 $=2$ (SPOUSE BONDS), go to IAQ37A. <br> Otherwise, go to BOX IAQ10. |  |  |
| OTHER_COMBINED1 | IAQ35 | code one | You told me earlier that [youl(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? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. | (1) ENTER COMBINED AMOUNT <br> (2) ENTER SP AND SPOUSE/PARTNER <br> AMOUNTS <br> SEPARATELY <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) IAQ35A (2) IAQ36A (-8) IAQ35B (-9) IAQ35B |
| OTHER_COMBINED2 | IAQ35A | quantity unit | ENTER COMBINED SP AND SPOUSE'S/PARTNER'S MUTUAL FUNDS/STOCKS/BONDS AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOXIAQ10 <br> (-8) BOX IAQ9A <br> (-9) BOX IAQ9A |
| OTHER_COMBINED3 | IAQ35B | code one | SHOW CARD IA19 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 9,000$ <br> (2) $\$ 9,000$ TO LESS THAN $\$ 18,000$ <br> (3) $\$ 18,000$ TO LESS THAN $\$ 93,000$ <br> (4) $\$ 93,000$ TO LESS THAN $\$ 350,000$ <br> (5) $\$ 350,000$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ10 |
|  | B0X 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 IA2O <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 600$ <br> (2) $\$ 600$ TO LESS THAN $\$ 5,000$ <br> (3) $\$ 5,000$ TO LESS THAN $\$ 16,000$ <br> (4) $\$ 16,000$ TO LESS THAN $\$ 62,000$ <br> (5) $\$ 62,000$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ10 |


| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
| :---: | :---: | :---: | :---: | :---: | :---: |
| OTHER_SP1 | IAQ36A | quantity unit | You told me earlier that [you own/(SP) owns] [mutual funds or stocks] [government, corporate, or other bonds] that are not part of retirement accounts. About how much are these worth? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SP MUTUAL FUNDS/STOCKS/BONDS AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ9C <br> (-8) BOX IAQ9B <br> (-9) BOX IAQ9B |
|  | BOX IAQ9B | routing | If $\operatorname{IAQ8}=1$ (SP MUTUAL FUNDS), go to IAQ36B. Otherwise, go to IAQ36C. |  |  |
| OTHER_SP2 | IAQ36B | code one | SHOW CARD IA21 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 8,000$ <br> (2) $\$ 8,000$ TO LESS THAN $\$ 62,000$ <br> (3) $\$ 62,000$ TO LESS THAN $\$ 192,000$ <br> (4) $\$ 192,000$ TO LESS THAN $\$ 213,000$ <br> (5) $\$ 213,000$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOXIAQ9C |
| OTHER_SP3 | IAQ36C | code one | SHOW CARD IA22 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 300$ <br> (2) $\$ 300$ TO LESS THAN $\$ 2,500$ <br> (3) $\$ 2,500$ TO LESS THAN $\$ 8,000$ <br> (4) $\$ 8,000$ TO LESS THAN $\$ 37,000$ <br> (5) \$37,000 OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ9C |
|  | BOX IAQ9C | routing | If $\operatorname{IAQ8}=2$ (SPOUSE MUTUAL FUNDS) or IAQ9 $=2$ (SPOUSE BONDS), go to IAQ37A. Otherwise, go to BOX IAQ10. |  |  |
| OTHER_SPOUSE1 | IAQ37A | quantity unit | You told me earlier that [you own/(SPOUSE FIRSTNAME LASTNAME) owns/(PARTNER FIRSTNAME <br> LASTNAME) owns] [mutual funds or stocks] [government, corporate, or other bonds] that are not part of retirement accounts. About how much are these worth? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SPOUSE'S/PARTNER'S MUTUAL FUNDS/STOCKS/BONDS AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ10 <br> (-8) BOX IAQ9D <br> (-9) BOX IAQ9D |
|  | B0X IAQ9D | routing | If IAQ8 $=2$ (SPOUSE MUTUAL FUNDS), go to IAQ37B. Otherwise, go to IA37C |  |  |
| OTHER_SPOUSE2 | IAQ37B | code one | SHOW CARD IA21 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 8,000$ <br> (2) $\$ 8,000$ TO LESS THAN $\$ 62,000$ <br> (3) $\$ 62,000$ TO LESS THAN $\$ 192,000$ <br> (4) $\$ 192,000$ TO LESS THAN $\$ 213,000$ <br> (5) $\$ 213,000$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ10 |


| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
| :---: | :---: | :---: | :---: | :---: | :---: |
| OTHER_SPOUSE3 | IAQ37C | code one | SHOW CARD IA22 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 300$ <br> (2) $\$ 300$ TO LESS THAN $\$ 2,500$ <br> (3) $\$ 2,500$ TO LESS THAN $\$ 8,000$ <br> (4) $\$ 8,000$ TO LESS THAN $\$ 37,000$ <br> (5) $\$ 37,000$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ10 |
|  | 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. <br> Else if $\operatorname{IAQ10}=1$ (SP CHECKING) or IAQ11 $=1$ (SP SAVINGS) or IAQ13 $=1$ (SP CDS), go to IAQ39A. <br> EIse if IAQ10 $=2$ (SPOUSE CHECKING) or IAQ11 $=2$ (SPOUSE SAVINGS) or IAQ13 $=2$ (SPOUSE CDS), go to IAQ40A. <br> Otherwise, go to BOX IAQ11. |  |  |
| ACCTS_COMBINED1 | IAQ38 | code one | You told me earlier that [you/(SP)] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME <br> LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] have [checking accounts] [savings or money market accounts] [certificates of deposit or CDs]. <br> If you added up all of these accounts, about how much were they worth early last month (meaning in the beginning of [CURRENT MONTH - 1])? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. | (1) ENTER COMBINED AMOUNT <br> (2) ENTER SP AND SPOUSE/PARTNER <br> AMOUNTS <br> SEPARATELY <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) IAQ38A (-8) IAQ38B (-9) IAQ38B |
| ACCTS_COMBINED2 | IAQ38A | quantity unit | ENTER COMBINED SP AND SPOUSE'S/PARTNER'S ACCOUNTS TOTAL AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOXIAQ11 <br> (-8) BOX IAQ10A <br> (-9) BOX IAQ10A |
|  | BOX IAQ10A | routing | If IAQ12 $=[1$ (SP CDs) and 2 (SPOUSE CDs)] or 3 (JOINT CDs), go to IAQ38B. Otherwise, go to IAQ38C. |  |  |
| ACCTS_SEPARATE1 | IAQ38B | code one | SHOW CARD IA23 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 11,000$ <br> (2) $\$ 11,000$ TO LESS THAN $\$ 25,000$ <br> (3) $\$ 25,000$ TO LESS THAN $\$ 50,000$ <br> (4) $\$ 50,000$ TO LESS THAN $\$ 108,000$ <br> (5) \$108,000 OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ11 |
| ACCTS_SEPARATE2 | IAQ38C | code one | SHOW CARD IA24 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 2,000$ <br> (2) $\$ 2,000$ TO LESS THAN $\$ 7,000$ <br> (3) $\$ 7,000$ TO LESS THAN $\$ 17,000$ <br> (4) $\$ 17,000$ TO LESS THAN $\$ 57,000$ <br> (5) $\$ 57,000$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ11 |


| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
| :---: | :---: | :---: | :---: | :---: | :---: |
| 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]. <br> If you added up all of these accounts, about how much were they worth early last month (meaning in the beginning of [CURRENT MONTH - 1])? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SP ACCOUNTS TOTAL AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ10C <br> (-8) BOX IAQ10B <br> (-9) BOX IAQ10B |
|  | BOX IAQ10B | routing | If IAQ12 $=1$ (SP CDs), go to IAQ39b. Otherwise, go to IAQ39c. |  |  |
| ACCTS_SP2 | IAQ39B | code one | SHOW CARD IA25 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 8,000$ <br> (2) $\$ 8,000$ TO LESS THAN $\$ 13,000$ <br> (3) $\$ 13,000$ TO LESS THAN $\$ 28,000$ <br> (4) $\$ 28,000$ TO LESS THAN $\$ 54,000$ <br> (5) $\$ 54,000$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ10C |
| ACCTS_SP3 | IAQ39C | code one | SHOW CARD IA26 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 500$ <br> (2) $\$ 500$ TO LESS THAN $\$ 1,900$ <br> (3) $\$ 1,900$ TO LESS THAN $\$ 5,000$ <br> (4) $\$ 5,000$ TO LESS THAN $\$ 20,000$ <br> (5) $\$ 20,000$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | B0X IAQ10C |
|  | 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. |  |  |
| 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]. <br> If you added up all of these accounts, about how much were they worth early last month (meaning in the beginning of [CURRENT MONTH - 1])? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SPOUSE/PARTNER ACCOUNTS TOTAL AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ11 <br> (-8) BOX IAQ10D <br> (-9) BOX IAQ10D |
|  | BOX IAQ10D | routing | If IAQ12 $=2$ (SPOUSE CDS), go to IAQ40b. Otherwise, go to IAQ40c. |  |  |
| ACCTS_SPOUSE2 | IAQ40B | code one | SHOW CARD IA25 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 8,000$ <br> (2) $\$ 8,000$ TO LESS THAN $\$ 13,000$ <br> (3) $\$ 13,000$ TO LESS THAN $\$ 28,000$ <br> (4) $\$ 28,000$ TO LESS THAN $\$ 54,000$ <br> (5) $\$ 54,000$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ11 |


| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
| :---: | :---: | :---: | :---: | :---: | :---: |
| ACCTS_SPOUSE3 | IAQ40C | code one | SHOW CARD IA26 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 500$ <br> (2) $\$ 500$ TO LESS THAN $\$ 1,900$ <br> (3) $\$ 1,900$ TO LESS THAN $\$ 5,000$ <br> (4) $\$ 5,000$ TO LESS THAN $\$ 20,000$ <br> (5) $\$ 20,000$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ11 |
|  | BOX IAQ11 | routing | If [IAQ8 $=1$ (SP MUTUAL FUNDS) and IAQ8 $=2$ (SPOUSE MUTUAL FUNDS)] or IAQ8 $=3$ (JOINT MUTUAL FUNDS) or <br> [IAQ9 = 1 (SP BONDS) and IAQ9 $=2$ (SPOUSE BONDS)] or IAQ9 $=3$ (JOINT BONDS), or <br> $[$ 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 <br> [IAQ12 = 1 (SP CDS) and IAQ12= 2 (SPOUSE CDS)] or IAQ12 = 3 (JOINT CDS), go to IAQ41. <br> 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. <br> Else if IAQ8 $=2$ (SPOUSE MUTUAL FUNDS) or IAQ9 $=2$ (SPOUSE BONDS) or IAQ10 $=2$ (SPOUSE CHECKING) or <br> IAQ11 $=2$ (SPOUSE SAVINGS) or IAQ12 $=2$ (SPOUSE CDS), go to IAQ43A. <br> 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]? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. | (1) ENTER COMBINED AMOUNT <br> (2) ENTER SP AND SPOUSE/PARTNER <br> AMOUNTS <br> SEPARATELY <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) IAQ41A (2) IAQ42A (-8) IAQ41B (-9) IAQ41B |
| INTEREST_COMBINED2 | IAQ41A | quantity unit | ENTER SP AND SPOUSE'S/PARTNER'S INTEREST AND DIVIDEND INCOME AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOXIAQ12 <br> (-8) IAQ41B <br> (-9) IAQ41B |
| INTEREST_COMBINED3 | IAQ41B | code one | SHOW CARD IA27 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 200$ <br> (2) $\$ 200$ TO LESS THAN $\$ 1,000$ <br> (3) $\$ 1,000$ TO LESS THAN $\$ 4,000$ <br> (4) $\$ 4,000$ TO LESS THAN $\$ 16,000$ <br> (5) $\$ 16,000$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ12 |
| INTEREST_SP1 | IAQ42A | quantity unit | Now thinking about all of last year, 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]? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SP INTEREST AND DIVIDEND INCOME AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ11A <br> (-8) IAQ42B <br> (-9) IAQ42B |


| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
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| INTEREST_SP2 | IAQ42B | code one | SHOW CARD IA28 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 400$ <br> (2) $\$ 400$ TO LESS THAN $\$ 1,000$ <br> (3) $\$ 1,000$ TO LESS THAN $\$ 2,000$ <br> (4) $\$ 2,000$ TO LESS THAN $\$ 11,000$ <br> (5) $\$ 11,000$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ11A |
|  | 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 last year, 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]? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SPOUSE/PARTNER INTEREST AND DIVIDEND INCOME AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ12 <br> (-8) IAQ43B <br> (-9) IAQ43B |
| INTEREST_SPOUSE2 | IAQ43B | code one | SHOW CARD IA28 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 400$ <br> (2) $\$ 400$ TO LESS THAN $\$ 1,000$ <br> (3) $\$ 1,000$ TO LESS THAN $\$ 2,000$ <br> (4) $\$ 2,000$ TO LESS THAN $\$ 11,000$ <br> (5) $\$ 11,000$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOXIAQ12 |
|  | BOX IAQ12 | routing | If [IAQ13 $=1$ (SP BUSINESS/FARM/REAL ESTATE) and IAQ13 $=2$ (SPOUSE BUSINESS/FARM/REAL ESTATE)] <br> or IAQ13 =3 (JOINT BUSINESS/FARM/REAL ESTATE), go to IAQ44. <br> Else if IAQ13 = 1 (SP BUSINESS/FARM/REAL ESTATE), go to IAQ45A. <br> Else if IAQ13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IAQ46A. <br> Otherwise, go to BOX IAQ13. |  |  |
| LAND_COMBINED1 | IAQ44 | code one | You told me earlier that [you/(SP)] and [(SP FIRSTNAME LASTNAMe)/(SPOUSE FIRSTNAME <br> 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? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. | (1) ENTER COMBINED AMOUNT <br> (2) ENTER SP AND SPOUSE/PARTNER <br> AMOUNTS <br> SEPARATELY <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) $I A Q 44 A$ (-8) IAQ44B (-9) IAQ44B |
| LAND_COMBINED2 | IAQ44A | quantity unit | ENTER SP AND SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE COMBINED AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOXIAQ13 <br> (-8) IAQ44B <br> (-9) IAQ44B |
| LAND_COMBINED3 | IAQ44B | code one | SHOW CARD IA29 <br> Please look at this card and tell me which is closest. | (1) LESS THAN \$30,000 <br> (2) $\$ 30,000$ TO LESS THAN $\$ 101,000$ <br> (3) $\$ 101,000$ TO LESS THAN $\$ 247,000$ <br> (4) $\$ 247,000$ TO LESS THAN $\$ 703,000$ <br> (5) \$703,000 OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ13 |


| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
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| 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? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SP BUSINESS/FARM/REAL ESTATE AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ12A <br> (-8) IAQ45B <br> (-9) IAQ45B |
| LAND_SP2 | IAQ45B | code one | SHOW CARD IA30 <br> Please look at this card and tell me which is closest. | (1) LESS THAN \$18,000 <br> (2) $\$ 18,000$ TO LESS THAN $\$ 68,000$ <br> (3) $\$ 68,000$ TO LESS THAN $\$ 122,000$ <br> (4) $\$ 122,000$ TO LESS THAN $\$ 293,000$ <br> (5) $\$ 293,000$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ12A |
|  | BOX IAQ12A | routing | If IAQ13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IAQ46A. Otherwise, go to BOX IAQ13. |  |  |
| LAND_SPOUSE1 | IAQ36A | 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? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOXIAQ13 <br> (-8) IAQ46B <br> (-9) IAQ46B |
| LAND_SPOUSE2 | IAQ46B | code one | SHOW CARD IA30 <br> Please look at this card and tell me which is closest. | (1) LESS THAN \$18,000 <br> (2) $\$ 18,000$ TO LESS THAN $\$ 68,000$ <br> (3) $\$ 68,000$ TO LESS THAN $\$ 122,000$ <br> (4) $\$ 122,000$ TO LESS THAN $\$ 293,000$ <br> (5) \$293,000 OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ13 |
|  | BOX IAQ13 | routing | If [IAQ13 $=1$ (SP BUSINESS/FARM/REAL ESTATE) and IAQ13 $=2$ (SPOUSE BUSINESS/FARM/REAL ESTATE)] <br> or IAQ13 = 3 (JOINT BUSINESS/FARM/REAL ESTATE), go to IAQ47. <br> Else if IAQ13 = 1 (SP BUSINESS/FARM/REAL ESTATE), go to IAQ48A. <br> Else if IAQ13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IAQ49A. <br> 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? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. | (1) ENTER COMBINED AMOUNT <br> (2) ENTER SP AND SPOUSE/PARTNER <br> AMOUNTS SEPARATELY <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) IAQ47A (2) IAQ48A <br> (-8) IAQ47B <br> (-9) IAQ47B |
| INCOME_COMBINED2 | IAQ47A | quantity unit | ENTER SP AND SPOUSE/PARTNER FROM BuSINESS/FARM/REAL ESTATE COMBINED AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) IAQ50 <br> (-8) IAQ47B <br> (-9) IAQ47B |


| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
| :---: | :---: | :---: | :---: | :---: | :---: |
| INCOME_COMBINED3 | IAQ47B | code one | SHOW CARD IA31 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 3,600$ <br> (2) $\$ 3,600$ TO LESS THAN $\$ 12,000$ <br> (3) $\$ 12,000$ TO LESS THAN $\$ 25,000$ <br> (4) $\$ 25,000$ TO LESS THAN $\$ 64,000$ <br> (5) $\$ 64,000$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | IAQ50 |
| 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? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SP BUSINESS/FARM/REAL ESTATE AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ13A <br> (-8) IAQ48B <br> (-9) IAQ48B |
| INCOME_SP2 | IAQ48B | code one | SHOW CARD IA32 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 3,600$ <br> (2) $\$ 3,600$ TO LESS THAN $\$ 7,200$ <br> (3) $\$ 7,200$ TO LESS THAN $\$ 14,000$ <br> (4) $\$ 14,000$ TO LESS THAN $\$ 38,000$ <br> (5) \$38,000 OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ13A |
|  | 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? <br> IF NEEDED: We don't need an exact dollar amount. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) IAQ50 $(-8)$ IAQ49B $(-9)$ IAQ49B |
| INCOME_SPOUSE2 | IAQ49B | code one | SHOW CARD IA32 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 3,600$ <br> (2) $\$ 3,600$ TO LESS THAN $\$ 7,200$ <br> (3) $\$ 7,200$ TO LESS THAN $\$ 14,000$ <br> (4) $\$ 14,000$ TO LESS THAN $\$ 38,000$ <br> (5) $\$ 38,000$ OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | IAQ50 |


| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
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| 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. <br> Now think about that total income from: <br> [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. <br> 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])? <br> IF NEEDED: We don't need an exact dollar amount - the nearest $\$ 1,000$ is fine. <br> IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. <br> ENTER TOTAL INCOME FOR LAST YEAR. <br> 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] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX IAQ13B <br> (-8) BOX IAQ14 <br> (-9) BOX IAQ14 |
|  | 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 <br> Please look at this card and tell me which is closest. | (01) A. Less than $\$ 5,000$ <br> (02) B. $\$ 5,000$ - less than $\$ 10,000$ <br> (03) C. $\$ 10,000$ - less than $\$ 15,000$ <br> (04) D. $\$ 15,000$ - less than $\$ 20,000$ <br> (05) E. $\$ 20,000$ - less than $\$ 25,000$ <br> (06) F. $\$ 25,000$ - less than $\$ 30,000$ <br> (07) G. $\$ 30,000-$ less than $\$ 40,000$ <br> (08) H. $\$ 40,000$ - less than $\$ 50,000$ <br> (09) I. $\$ 50,000$ - less than $\$ 66,000$ <br> (10) J. $\$ 66,000$ - less than $\$ 109,000$ (11) K. $\$ 109,000$ or more <br> (11) K. $\$ 109,000$ or more <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ15 |
| TOTAL_SP1 | IAQ51B | code one | SHOW CARD IA34 <br> Please look at this card and tell me which is closest. | (01) A. Less than $\$ 5,000$ <br> (02) B. $\$ 5,000$ - less than $\$ 10,000$ <br> (03) C. $\$ 10,000$ - less than $\$ 15,000$ <br> (04) D. $\$ 15,000$ - less than $\$ 20,000$ <br> (05) E. $\$ 20,000$ - less than $\$ 25,000$ <br> (06) F. $\$ 25,000$ - less than $\$ 30,000$ <br> (07) G. $\$ 30,000$ - less than $\$ 40,000$ <br> (08) H. $\$ 40,000$ - less than $\$ 50,000$ <br> (09) I. $\$ 50,000$ - less than $\$ 66,000$ <br> (10) J. $\$ 66,000$ - less than $\$ 109,000$ (11) K. $\$ 109,000$ or more <br> (11) K. $\$ 109,000$ or more <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX IAQ15 |
|  | BOX IAQ15 | routing | If SPAISTATUS $=3$ (Deceased in Community) or 4 (Deceased in Institution), go to BOX ENDIAQ. Otherwise, go to IAQ52-LUMP. |  |  |


| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
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| LUMP | IAQ52 | code one | SHOWCARD IA35 <br> 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 <br> PAYMENT FROM SOURCE <br> (2) NO PAYMENT RECEIVED FROM THIS SOURCE <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) IAQ52A - LUMPFORM <br> (2) CO1-OWNCAR <br> (-8) CO1 - OWNCAR <br> (-9) CO1 - OWNCAR |
| LUMPFORM | IAQ52A | code one | SHOWCARD IA35 <br> 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 <br> (2) PENSION SETTLEMENT <br> (3) INHERITANCE (OR TRUST) <br> (4) GIFT <br> (5) LAWSUIT <br> (91) OTHER (SPECIFY) <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) IAQ52B - LUMP_SUM1 <br> (2) IAQ52B - LUMP_SUM1 <br> (3) IAQ52B - LUMP_SUM1 <br> (4) IAQ52B - LUMP_SUM1 <br> (5) IAQ52B - LUMP_SUM1 <br> (91) IAQ52A - LUMP_OTH <br> (-8) IAQ52B - LUMP_SUM1 <br> (-9) IAQ52B - LUMP_SUM1 |
| LUMP_OTH | IAQ52A | verbatim text | OTHER (SPECIFY) | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | IAQ52B - LUMP_SUM1 |
| 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)]? <br> DO NOT PROBE. | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) CO1-OWNCAR <br> (-8) IAQ52C - LUMP_SUM2 <br> (-9) IAQ52C - LUMP_SUM2 |
| 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 $\$ 50 \mathrm{~K}$ <br> (2) ABOUT $\$ 50 \mathrm{~K}$ <br> (3) MORE THAN $\$ 50 \mathrm{~K}$ <br> (-8) DON'T KNOW <br> (-9) REFUSED | CO1- OWNCAR |
| OWNCAR | CO1 | yes/no | Now, I would like to change topics and talk about automobiles [you own/(SP) owns] [or (your/his/her) (husband/wife/partner) owns]. <br> [Do you/Does (SP)] [or (your/his/her) (husband/wife/partner)] own any cars, trucks, or vans? <br> IF NEEDED: Do not include recreational vehicles, such as motorcycles, trailers, motor homes, boats, or airplanes. | (1) YES <br> (2) NO <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) CO 2 (2) FSINTRO1 <br> (-8) FSINTRO1 <br> (-9) FSINTRO1 |
| NUMCAR | CO2 | quantity unit | How many vehicles [do you/does (SP)] [or (your/his/her) (husband/wife/partner)] own? <br> ENTER NUMBER OF VEHICLES <br> [IF NEEDED: Do not include leased cars.] | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | (1) BOX CO2 <br> (-8) FSINTRO1 <br> (-9) FSINTRO1 |
|  | BOX CO 2 | routing | If $\mathrm{CO} 2<2$, go to FSINTRO1. Otherwise, go to CO3-PVCAR1. |  |  |
| 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? <br> ENTER DOLLAR AMOUNT | (1) [continuous response] <br> (-8) DON'T KNOW <br> (-9) REFUSED | $\begin{aligned} & (1) \text { FSINTRO1 } \\ & (-8) \text { CO3A } \\ & (-9) \text { CO3A } \end{aligned}$ |


| Variable Name | MR Screen Name | Question Type | Question Text/Description | Code List | Routing |
| :---: | :---: | :---: | :---: | :---: | :---: |
| PVCAR2 | c03A | code one | SHOW CARD IA36 <br> Please look at this card and tell me which is closest. | (1) LESS THAN $\$ 2,500$ <br> (2) $\$ 2,500$ TO LESS THAN $\$ 5,000$ <br> (3) $\$ 5,000$ TO LESS THAN $\$ 7,500$ <br> (4) $\$ 7,500$ TO LESS THAN $\$ 10,000$ <br> (5) $\$ 10,000$ TO LESS THAN $\$ 20,000$ <br> (6) \$20,000 OR MORE <br> (-8) DON'T KNOW <br> (-9) REFUSED | FSINTRO1 |
| 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]. |  | FS1 |
| 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]. <br> The first statement is, The food that [l/we/(SP)/(SP) or other adults in (SP)'s household] bought just didn't last, and [l/we/he/she/they] didn't have money to get more. <br> Was that often, sometimes, or never true for [you/your household/(SP)/(SP)'s household] in the last 12 months? | (1) OFTEN TRUE <br> (2) SOMETIMES TRUE <br> (3) NEVER TRUE <br> (-8) DON'T KNOW <br> (-9) REFUSED | FS2 |
| FOODLAST_OFTEN | FS2 | code one | The next statement is: [//we/(SP)/(SP) or other adults in (SP)'s household] couldn't afford to eat balanced meals. Was that often, sometimes, or never true for [you/your household/(SP)/(SP)'s household] in the last 12 months? <br> [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 <br> (2) SOMETIMES TRUE <br> (3) NEVER TRUE <br> (-8) DON'T KNOW <br> (-9) REFUSED | FS3 |
| SKIPMEAL | FS3 | code one | In the last 12 months, since last (name of current month), did [youlyou or other adults in your household/(SP)/((SP) or other adults in (SP)'s household] ever cut the size of [your/his/her/their] meals or skip meals because there wasn't enough money for food? | (1) YES <br> (2) NO <br> (-8) DON'T KNOW <br> (-9) REFUSED | $\begin{aligned} & (1) \text { FS3A } \\ & (2) \text { FS4 } \\ & (-8) \text { FS4 } \\ & (-9) \text { FS4 } \end{aligned}$ |
| 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 <br> (2) SOME MONTHS BUT NOT EVERY MONTH <br> (3) IN ONLY 1 OR 2 MONTHS <br> (-8) DON'T KNOW <br> (-9) REFUSED | FS4 |
| 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 <br> (2) NO <br> (-8) DON'T KNOW <br> (-9) REFUSED | FS5 |
| 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 <br> (2) NO <br> (-8) DON'T KNOW <br> (-9) REFUSED | BOX ENDIAQ |
|  | BOXENDIAQ | routing | GO TO RXQ. |  |  |

