

# UnderStandingAmericaStudy

UAS 400: HEALTH AND RETIREMENT STUDY, SECTIONS Q-R



Survey author(s): Institute for Social Research and USC Dornsife Center for Economic  
and Social Research

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# 1 INTRODUCTION

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This UAS panel survey, titled "UAS400: Health and Retirement Study Sections Q-R", administers the Health and Retirement Study sections Q (Assets), and R (Change in assets), and asks some questions about respondents and their income and assets. This survey is no longer in the field. Respondents were paid \$10 to complete the survey.

*The UAS HRS data collections are modeled on the University of Michigan's Health and Retirement Study. Questions were adapted to online use, and collected by CESR through the UAS. More information about the UAS HRS data collections is available online at <https://uasdata.usc.edu/page/Health+And+Retirement>. For information about HRS variables not covered in this codebook, please refer to the HRS documentation at <http://hrsonline.isr.umich.edu/>.*

## 1.1 Topics

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This survey contains questions (among others) on the following topics: Income, Savings. A complete survey topic categorization for the UAS can be found [here](#).

## 1.2 Experiments

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This survey includes experiment(s) of the following type(s): Auxiliary Randomization. Please refer to explanatory comments in the Routing section for detailed information. A complete survey experiment categorization for the UAS can be found [here](#).

## 1.3 Citation

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Each publication, press release or other document that cites results from this survey must include an acknowledgment of UAS as the data source and a disclaimer such as, 'The project described in this paper relies on data from survey(s) administered by the Understanding America Study, which is maintained by the Center for Economic and Social Research (CESR) at the University of Southern California. The content of this paper is solely the responsibility of the authors and does not necessarily represent the official views of USC or UAS.' For any questions or more information about the UAS, contact Tania Gutsche, Project and Panel Manager, Center for Economic and Social Research, University of Southern California, at [tgutsche@usc.edu](mailto:tgutsche@usc.edu).

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## 2 SURVEY RESPONSE AND DATA

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### 2.1 Sample selection and response rate

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The sample selection for this survey was:

All active respondents who completed HRS Wave 4 J-M (UAS398).

As such, this survey was made available to 10880 UAS participants. Of those 10880 participants, 10632 completed the survey and are counted as respondents. Of those who are not counted as respondents, 80 started the survey without completing and 168 did not start the survey. The overall response rate was 97.72%.

Note: We are unable to provide sample weights for a small number of UAS members (see the Sample and weighting section below for details). If they completed the survey, these members are included in the data set with a weight of zero, but accounted for in the computation of total sample size and survey response rate.%.

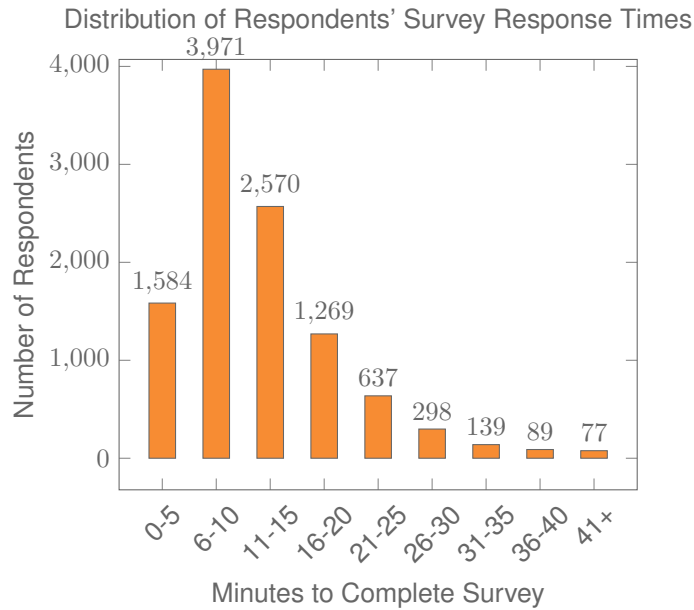
The detailed survey response rate is as follows:

UAS400 - Response Overview	
Size of selected sample	10880
Completed the survey	10632
Started but did not complete the survey	80
Did not start the survey	168
Response rate	97.72%

### 2.2 Timings

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The survey took respondents an average of 12 minutes, and the full distribution of survey response times is available in the figure below. Times per question are available upon request.



## 2.3 Sample & Weighting

Sample weights for this survey are computed following the general UAS Weighting Procedure. Specifically, we use a two-step process where we first compute base weights, which correct for unequal probabilities of sampling UAS members, and then generate final, post-stratification weights, which align the sample to the reference population along certain socio-economic dimensions. These are gender (male/female), race and ethnicity (White/Black/Other/Hispanic/Native American), age (18-39/40-49/50-59/60+), education (High school or less/Some college/Bachelor or more), Census regions (Northeast/Midwest/West, excl. CA/CA, excl. LAC, LAC). Benchmark distributions for these variables are derived from the 6 most recent available Current Population Survey (CPS) Basic Monthly Survey with respect to the survey's completion date. The reference population considered for the weights is the U.S. population of adults age 18 and older.

This survey dataset may contain respondents with a weight of zero. These respondents belong to a small group of UAS members for whom sample weights cannot be computed due to non-probability recruitment for special projects. Hence, while they are accounted for in the total number of survey respondents, they do not contribute to any statistics using sample weights. More information is available from the UAS Weighting Procedure. Please contact UAS staff with any questions.

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### 3 STANDARD VARIABLES

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Each Understanding America Study data contains a series of standard variables, consisting of individual, household and sample identifiers, language indicator, time stamps and a rating by the respondent of how much he or she liked the survey:

- **uasid**: the identifier of the respondent. This identifier is assigned to a respondent at recruitment and stays with the respondent throughout each and every survey he/she participates in. When analyzing data from multiple surveys, the 'uasid' can be used to merge data sets.
- **uashhid**: the household identifier of the respondent. Every member is assigned a household identifier, stored in the variable 'uashhid'. For the primary respondent this identifier equals his or her 'uasid'. All other eligible members of the primary respondent's household (everyone who is 18 or older in the household) who become UAS respondents receive the 'uasid' of the primary respondent as their household identifier. The identifier 'uashhid' remains constant over time for all respondents. Thus it is always possible to find the original UAS household of an UAS panel member (even after they, for example, have moved out to form another household).
- **survhhid**: uniquely identifies the household a UAS panel member belongs to in a given survey. For instance, if the primary respondent and his/her spouse are both UAS members at the time of a given survey, they both receive the same 'survhhid' identifier for that survey. If they subsequently split, they receive two different 'survhhid' in subsequent surveys. They, however, always share the same 'uashhid'. The identifier 'survhhid' is set to missing (.) if no other household members are UAS panel members at the time of the survey. Since individuals can answer the same survey at different points in time (which can be relatively far apart if the survey is kept in the field for a prolonged time), it may be possible that, within the same data set, household members have different 'survhhid' reflecting different household compositions at the time they answered the survey. For instance, suppose that the primary respondent and his/her spouse are both UAS members. If the primary respondent answers the survey when he/she is living with the spouse, but the spouse answers the survey when the couple has split, they receive different 'survhhid'. Hence, the variable 'survhhid' identifies household membership of UAS panel members, at the time the respondent answers the survey. Note: in the My Household survey 'survhhid' is set to unknown (.u) for respondents who last participated in the My Household survey prior to January 21, 2015.
- **uasmembers**: is the number of other household members who are also UAS panel members at the time of the survey. Since individuals can answer the same survey at different points in time (which can be relatively far apart if the survey is kept in the field for a prolonged time), it may be possible that, within the same data set, the primary respondent of a household has a value of '0', whereas the second UAS household respondent has a value of '1'. Therefore 'uasmembers' should be interpreted as the

number of household and UAS panel members at the time the respondent answers the survey. Note: in the My Household survey 'uasmembers' is set to unknown (.u) for respondents who last participated in the My Household survey prior to January 21, 2015.

- **sampleframe**: indicates the sampling frame from which the household of the respondent was recruited. All UAS recruitment is done through address based sampling (ABS) in which samples are acquired based on postal records. Currently, the variable 'sampleframe' takes on four values reflecting four distinct sample frames used by the UAS over the year (in future data sets the number of sample frames used for recruitment may increase if additional specific populations are targeted in future recruitment batches):

1. U.S. National Territory: recruited through ABS within the entire U.S.
2. Areas high concentration Nat Ame: recruited through ABS in areas with a high concentration of Native Americans in the zip-code. Within these batches, individuals who are not Native Americans are not invited to join the UAS.
3. Los Angeles County: recruited through ABS within Los Angeles County.
4. California: recruited through ABS within California.

Note: prior to March 6, 2024 this variable was called sampletype and had the following value labels for the above list in UAS data sets:

1. Nationally Representative Sample: recruited through ABS within the entire U.S.
2. Native Americans: recruited through ABS in areas with a high concentration of Native Americans. Within these batches, individuals who are not Native Americans are not invited to join the UAS.
3. LA County: recruited through ABS within Los Angeles County.
4. California: recruited through ABS within California.

- **batch**: indicates the batch from which the respondent was recruited. Currently, this variable takes the following values (in future data sets the number of batches may increase as new recruitment batches are added to the UAS):

1. ASDE 2014/01
2. ASDE 2014/01
3. ASDE 2014/01
4. Public records 2015/05
5. MSG 2015/07
6. MSG 2016/01
7. MSG 2016/01
8. MSG 2016/01
9. MSG 2016/02

10. MSG 2016/03
11. MSG 2016/04
12. MSG 2016/05
13. MSG 2016/08
14. MSG 2017/03
15. MSG 2017/11
16. MSG 2018/02
17. MSG 2018/08
18. MSG 2019/04
19. MSG 2019/05
20. MSG 2019/11
21. MSG 2020/08
22. MSG 2020/10
23. MSG 2021/02
24. MSG 2021/08
25. MSG 2021/08
26. MSG 2022/02
27. MSG 2022/02
28. MSG 2022/08
29. MSG 2022/11
30. MSG 2022/11
31. MSG 2023/01
32. MSG 2023/06
33. MSG 2023/09
34. MSG 2023/10
35. MSG 2025/02

Note: prior to March 6, 2024 this variable had the following value labels for the above list in UAS data sets:

1. ASDE 2014/01 Nat.Rep.
2. ASDE 2014/01 Native Am.
3. ASDE 2014/11 Native Am.
4. LA County 2015/05 List Sample
5. MSG 2015/07 Nat.Rep.
6. MSG 2016/01 Nat.Rep. Batch 2



7. MSG 2016/01 Nat.Rep. Batch 3
8. MSG 2016/01 Nat.Rep. Batch 4
9. MSG 2016/02 Nat.Rep. Batch 5
10. MSG 2016/03 Nat.Rep. Batch 6
11. MSG 2016/04 Nat.Rep. Batch 7
12. MSG 2016/05 Nat.Rep. Batch 8
13. MSG 2016/08 LA County Batch 2
14. MSG 2017/03 LA County Batch 3
15. MSG 2017/11 California Batch 1
16. MSG 2018/02 California Batch 2
17. MSG 2018/08 Nat.Rep. Batch 9
18. MSG 2019/04 LA County Batch 4
19. MSG 2019/05 LA County Batch 5
20. MSG 2019/11 Nat. Rep. Batch 10
21. MSG 2020/08 Nat. Rep. Batch 11
22. MSG 2020/10 Nat. Rep. Batch 12
23. MSG 2021/02 Nat. Rep. Batch 13
24. MSG 2021/08 Nat. Rep. Batch 15
25. MSG 2021/08 Nat. Rep. Batch 16
26. MSG 2022/02 Nat. Rep. Batch 17 (priority)
27. MSG 2022/02 Nat. Rep. Batch 17 (regular)
28. MSG 2022/08 Nat. Rep. Batch 18
29. MSG 2022/11 LA County Batch 6
30. MSG 2022/11 Nat. Rep. Batch 20
31. MSG 2023/01 Nat. Rep. Batch 21
32. MSG 2023/06 Nat. Rep. Batch 22
33. MSG 2023-09 Native Am. Batch 3
34. MSG 2023-10 Nat. Rep. Batch 23

- **primary\_respondent:** indicates if the respondent was the first person within the household (i.e. to become a member or whether s/he was added as a subsequent member. A household in this regard is broadly defined as anyone living together with the primary respondent. That is, a household comprises individuals who live together, e.g. as part of a family relationship (like a spouse/child/parent) or in context of some other relationship (like a roommate or tenant).

- **hardware**: indicates whether the respondent ever received hardware or not. Note: this variable should not be used to determine whether a respondent received hardware at a given point in time and/or whether s/he used the hardware to participate in a survey. Rather, it indicates whether hardware was ever provided:
  1. None
  2. Tablet (includes Internet)
- **language**: the language in which the survey was conducted. This variable takes a value of 1 for English and a value of 2 for Spanish.
- **start\_date (start\_year, start\_month, start\_day, start\_hour, start\_min, start\_sec)**: indicates the time at which the respondent started the survey.
- **end\_date (end\_year, end\_month, end\_day, end\_hour, end\_min, end\_sec)**: indicates the time at which the respondent completed the survey.
- **cs.001**: indicates how interesting the respondent found the survey.

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## 4 BACKGROUND DEMOGRAPHICS

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Every UAS survey data set includes demographic variables, which provide background information about the respondent and his/her household. Demographic information such as age, ethnicity, education, marital status, work status, state of residence, family structure is elicited every quarter through the “My Household” survey. The demographic variables provided with each survey are taken from the most recent ‘MyHousehold’ survey answered by the respondent. If at the time of a survey, the information in “My Household” is more than three months old, a respondent is required to check and update his or her information before being able to take the survey.

The following variables are available in each survey data set:

- **gender**: the gender of the respondent.
- **dateofbirth\_year**: the year of birth of the respondent.
- **age**: the age of the respondent at the start of the survey.
- **agerange**: if the respondent’s age cannot be calculate due to missing information, ‘agerange’ indicates the approximate age. Should a value for both the ‘age’ and ‘agerange’ be present, then ‘age’ takes precedence over ‘agerange’.
- **citizenus**: indicates whether the respondent is a U.S. citizen.
- **bornus**: indicates whether the respondent was born in the U.S.
- **stateborn**: indicates the state in which the respondent was born. This is set to missing (.) if the respondent was not born in the U.S.
- **countryborn**: indicates the country in which the respondent was born. This is set to missing (.) if the respondent was born in the U.S.
- **countryborn\_other**: indicates the country of birth if that country is not on the drop down list of countries shown to the respondent’.
- **statereside**: the state in which the respondent is living.
- **immigration\_status**: indicates whether the respondent is an immigrant. It takes one of the following values: 0 Non-immigrant, 1 First generation immigrant (immigrant who migrated to the U.S), 2 Second generation immigrant (U.S.-born children of at least one foreign-born parent), 3 Third generation immigrant (U.S.-born children of at least one U.S.-born parent, where at least one grandparent is foreign-born), or 4 Unknown immigrant status.
- **maritalstatus**: the marital status of the respondent.
- **livewithpartner**: indicates whether the respondent lives with a partner.

- **education**: the highest level of education attained by the respondent.
- **hisplatin**: indicates whether the respondent identifies him or herself as being Hispanic or Latino. This variable is asked separately from race.
- **hisplatinogroup**: indicates which Hispanic or Latino group a respondent identifies him or herself with. This is set to missing (.) if the respondent does not identify him or herself as being Hispanic or Latino.
- **white**: indicates whether the respondent identifies him or herself as white (Caucasian).
- **black**: indicates whether the respondent identifies him or herself as black (African-American).
- **nativeamer**: indicates whether the respondent identifies him or herself as Native American (American Indian or Alaska Native).
- **asian**: indicates whether the respondent identifies him or herself as Asian (Asian-American).
- **pacific**: indicates whether the respondent identifies him or herself as Native Hawaiian or Other Pacific Islander.
- **race**: indicates the race of the respondent as singular (e.g., '1 White' or '2 Black') or as mixed (in case the respondent identifies with two or more races). The value '6 Mixed' that the respondent answered 'Yes' to at least two of the single race categories. This variable is generated based on the values of the different race variables (white, black, nativeamer, asian, pacific). This composite measure is not conditional on hisplatin, so an individual may identify as Hispanic or Latino, and also as a member of one or more racial groups.
- **working**: indicates whether the respondent is working for pay.
- **sick\_leave**: indicates whether the respondent is not working because sick or on leave.
- **unemp\_layoff**: indicates whether the respondent is unemployed or on lay off.
- **unemp\_look**: indicates whether the respondent is unemployed and looking for a job.
- **retired**: indicates whether the respondent is retired.
- **disabled**: indicates whether the respondent has a disability.
- **If\_other**: specifies other labor force status.
- **laborstatus**: indicates the labor force status of the respondent as singular (e.g., '1 Working for pay' or '2 On sick or other leave') or as mixed (in case the respondent selects two or more labor statuses). The value '8 Mixed' indicates that the respondent answered 'Yes' to at least two of the single labor force status variables. This variable is generated based on the values of the different labor status variables (working, sick\_leave, unempl\_layoff, unempl\_look, retired, disabled, If\_other).

- **employmenttype**: indicates the employment type of the respondent (employed by the government, by a private company, a nonprofit organization, or self-employed). This is set to missing (.) if the respondent is not currently working or currently on sick or other leave.
- **workfullpart**: indicates whether the respondent works full or part-time. This is set to missing (.) if the respondent is not currently working or currently on sick or other leave.
- **hourswork**: indicates the number of hours the respondent works per week. This is set to missing (.) if the respondent is not currently working or currently on sick or other leave.
- **hhincome**: is the total combined income of all members of the respondent's household (living in their household) during the past 12 months.
- **anyhhmember**: indicates whether there were any members in the respondent's household at the time he/she answered the survey as reported by the respondent.
- **hhmembernumber**: indicates the number of household members in the respondent's household at the time of the survey as reported by the respondent. It may be that 'anyhhmember' is 'Yes', but 'hhmembernumber' is missing if the respondent did not provide the number of household members at the time of the survey.
- **hhmemberin\_#**: indicates whether a household member is currently in the household as reported by the respondent. Household members are never removed from the stored household roster and their information is always included in survey data sets. The order of the roster is the same order in which household members were specified by the respondent in the 'MyHousehold' survey. The order is identified by the suffix \_# (e.g., \_1 indicates the first household member, \_2 the second household member, etc.).

As an example, if the first household member is in the household at the time of the survey, 'hhmemberin\_1' is set to '1 HH Member 1 is in the HH'; if he/she has moved out, 'hhmemberin\_1' is set to '0 HH member 1 is no longer in the HH'. Since information of other household members (stored in the variables listed below) is always included in survey data sets, information about 'hhmemberin\_1' is available whether this person is still in the household or has moved out.

- **hhmembergen\_#**: indicates the gender of another household member as reported by the respondent.
- **hhmemberage\_#**: indicates the age of another household member. The age is derived from the month and year of birth of the household member as reported by the respondent.
- **hhmemberrel\_#**: indicates the relationship of the respondent to the other household member as reported by the respondent.

- **hhmemberuasid\_#**: is the 'uasid' of the other household member if this person is also a UAS panel member. It is set to missing (.) if this person is not a UAS panel member at the time of the survey. Since this identifier is directly reported by the respondent (chosen from a preloaded list), it may differ from the actual (correct) 'uasid' of the UAS member it refers to because of reporting error. Also, this variable should not be used to identify UAS members in a given household at the time of the survey. This is because the variables 'hhmemberuasid\_#' are taken from the most recent 'My Household' and changes in household composition involving UAS members may have occurred between the time of the respondent answered 'My Household' and the time the respondent answers the survey. To follow UAS members of a given household, it is advised to use the identifiers 'uashhid' and 'survhhid'.
- **lastmyhh\_date**: the date on which the demographics variables were collected through the 'My Household' survey.

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## 5 MISSING DATA CONVENTIONS

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Data files provide so-called clean data, that is, answers given to questions that are not applicable anymore at survey completion (for example because a respondent went back in the survey and skipped over a previously answered question) are treated as if the questions were never asked. In the data files all questions that were asked, but not answered by the respondent are marked with (.e). All questions never seen by the respondent (or any dirty data) are marked with (.a). The latter may mean that a respondent did not view the question because s/he skipped over it; or alternatively that s/he never reached that question due to a break off. If a respondent did not complete a survey, the variables representing survey end date and time are marked with (.c). Household member variables are marked with (.m) if the respondent has less household members (e.g. if the number of household members is 2, any variables for household member 3 and up are marked with (.m)).

UAS provides data in STATA and CSV format. Stata data sets come with include variable labels that are not available in the CSV files. Value labels are provided for single-response answer option. In STATA these labels will include the labels 'Not asked' and 'Not answered' for (.a) and (.e), and will show in tabulations such as 'tab q1, missing'. For multiple-response questions a binary variable is created for each answer option indicating whether the option was selected or not. A summary variable is also provided in string format reflecting which options were selected and in which order. For example, if a question asked about favorite animals with options cat, dog, and horse, then if a respondent selected horse and then cat, the binary variables for horse and cat will be set to yes, while the overall variable would have a string value of '3-1'. If no answer was given, all binary variables and the summary variable will be marked with '.e'.

Questions that are asked multiple times are often implemented as so-called array questions. Supposing the name of such question was Q1 and it was asked in 6 different instances, your data set would contain the variables Q1\_1\_ to Q1\_6\_. To illustrate, if a survey asked the names of all children, then child\_1\_ would contain the name of the first child the respondent named and so on.

More information about the UAS data in general can be found on the UAS Data Pages web site.

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## 6 ROUTING SYNTAX

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The survey with routing presented in the next section includes all of the questions that make up this survey, the question answers when choices were provided, and the question routing. The routing includes descriptions of when questions are grouped, conditional logic that determines when questions are presented to the respondent, randomization of questions and answers, and fills of answers from one question to another.

If you are unfamiliar with conditional logic statements, they are typically formatted so that **if** the respondent fulfills some condition (e.g. they have a cellphone or a checking account), **then** they are presented with some other question or the value of some variable is changed. If the respondent does not fulfill the condition (e.g. they are not a cellphone adopter or they do not have a checking account), something **else** happens such as skipping the next question or changing the variable to some other value. Some of the logic involved in the randomization of questions or answers being presented to the respondent is quite complex, and in these instances there is documentation to clarify the process being represented by the routing.

Because logic syntax standards vary, here is a brief introduction to our syntax standards. The syntax used in the conditional statements is as follows: '=' is equal to, '<' is less than, '>' is greater than, and '!= ' is used for does not equal. When a variable is set to some number N, the statement looks like 'variable := N'.

The formatting of the questions and routing are designed to make it easier to interpret what is occurring at any given point in the survey. Question ID is the bold text at the top of a question block, followed by the question text and the answer selections. When a question or variable has associated data, the name links to the appropriate data page, so you can easily get directly to the data. Text color is used to indicate the routing: **red** is conditional logic, **gold** is question grouping, **green** is looping, and **orange** is used to document randomization and other complex conditional logic processes. The routing is written for a computer to parse rather than a human to read, so when the routing diverges significantly from what is displayed to the respondent, a screenshot of what the respondent saw is included.

The name of the randomization variables are defined in proximity to where they are put into play, and like the question ID the names of the randomization variables can be used to link directly to the associated data page.



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## 7 SURVEY WITH ROUTING

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### Start of section **PreloadQ**

**intro1** (Section PreloadQ)

In this survey we would like to ask you some questions about your income and assets.

```
previous_z076 := getHRSPreloadWave3(6,"z076")
previous_endtime := getHRSPreloadWave3(6,"endtime")
```

**IF previous\_endtime = RESPONSE THEN**

| Z076 := YES

**ELSE**

| Z076 := NO

**END OF IF**

```
Q134_compare := -1
Q148_compare := -1
Q345_compare := -1
Q331_compare := -1
Q317_compare := -1
Q357_compare := -1
Q371_compare := -1
Q467_compare := -1
```

**IF Z076 = YES THEN**

```
Z092_temp := getBeginTime(5)
PrevIWMonth := date('n',strtotime(Z092_temp))
Fill code of question Z092 executed
Z093 := date('Y',strtotime(Z092_temp))
X008 := getHRSPreloadWave3(1,"A167_A028")
Z125 := getHRSPreloadWave3(3,"J478")
Z126 := getHRSPreloadWave3(5,"Q084_")
Z127 := getHRSPreloadWave3(5,"Q105_")
preload_Q134_ := getHRSPreloadWave3(5,"Q134_")
preload_Q148_ := getHRSPreloadWave3(5,"Q148_")
preload_Q345_ := getHRSPreloadWave3(5,"Q345_")
preload_Q331_ := getHRSPreloadWave3(5,"Q331_")
preload_Q317_ := getHRSPreloadWave3(5,"Q317_")
preload_Q357_ := getHRSPreloadWave3(5,"Q357_")
preload_Q371_ := getHRSPreloadWave3(5,"Q371_")
preload_Q467_ := getHRSPreloadWave3(5,"Q467_")
```

```

Q134_compare := str_replace('',' ', preload_Q134_)
Q148_compare := str_replace('',' ', preload_Q148_)
Q345_compare := str_replace('',' ', preload_Q345_)
Q331_compare := str_replace('',' ', preload_Q331_)
Q317_compare := str_replace('',' ', preload_Q317_)
Q357_compare := str_replace('',' ', preload_Q357_)
Q371_compare := str_replace('',' ', preload_Q371_)
Q467_compare := str_replace('',' ', preload_Q467_)

IF Q134_compare = EMPTY OR !is_numeric(Q134_compare) THEN
| Q134_compare := -1
END OF IF

IF Q148_compare = EMPTY OR !is_numeric(Q148_compare) THEN
| Q148_compare := -1
END OF IF

IF Q345_compare = EMPTY OR !is_numeric(Q345_compare) THEN
| Q345_compare := -1
END OF IF

IF Q331_compare = EMPTY OR !is_numeric(Q331_compare) THEN
| Q331_compare := -1
END OF IF

IF Q317_compare = EMPTY OR !is_numeric(Q317_compare) THEN
| Q317_compare := -1
END OF IF

IF Q357_compare = EMPTY OR !is_numeric(Q357_compare) THEN
| Q357_compare := -1
END OF IF

IF Q371_compare = EMPTY OR !is_numeric(Q371_compare) THEN
| Q371_compare := -1
END OF IF

IF Q467_compare = EMPTY OR !is_numeric(Q467_compare) THEN
| Q467_compare := -1
END OF IF

```

END OF IF

```
A026_Rmarried := getHRSPreload(1, "A026_Rmarried")
A027_RPartnerd := getHRSPreload(1, "A027_RPartnerd")
A102_NumRInLaw := getHRSPreload(1, "A102_NumRInLaw")
A101_TotalKids := getHRSPreload(1, "A101_TotalKids")
A098_NumHHM := getHRSPreload(1, "A098_NumHHM")
FLCurrentYear := date("Y")
X004AmoBorn(1) := getHRSPreload(1, "X004AmoBorn(1)")
X005AdaBorn(1) := getHRSPreload(1, "X005AdaBorn(1)")
X067AYrBorn := getHRSPreload(1, "X067AYrBorn", 2)
```

IF X004AmoBorn(1) = RESPONSE AND X005AdaBorn(1) = RESPONSE AND X067AYrBorn(1) = RESPONSE THEN

```
  A014 := calcAge(X067AYrBorn(1), X004AmoBorn(1), X005AdaBorn(1));
  A019_RAge := A014
```

ELSE

IF X067AYrBorn(1) = EMPTY THEN

```
  A019_RAge := empty
  A014 := empty
```

ELSE

```
  A014 := FLCurrentYear - X067AYrBorn(1)
  A019_RAge := A014
```

END OF IF

END OF IF

```
A166_A020TSameSpP_A := getHRSPreload(1,"A166_A020TSameSpP_A")
A044TSpAge_A := getHRSPreload(1,"A044TSpAge_A")
A209_LivTogethr := getHRSPreload(1,"A209_LivTogethr")
A030 := getHRSPreload(1,"A030")
A033_SpInNHome := getHRSPreload(1,"A033_SpInNHome")
A167_A028 := getHRSPreload(1,"A167_A028")
R2X060ASex := getHRSPreload(1, "R2X060ASex")
X065ACouplenss := getHRSPreload(1, "X065ACouplenss", 2)
Fill code of question FLHWP executed
personcounter := getHRSPreload(1, "personcounter")
```

IF personcounter = EMPTY THEN

```
  personcounter := 52
```

END OF IF

```
personcounter1 := getHRSPreload(1, "personcounter1")
```

IF personcounter1 = EMPTY THEN

| personcounter1 := 72

END OF IF

J021 := getHRSPReload(3,"J021")

J478 := getHRSPReload(3,"J478")

FLCurrentMonth := date("n")

InitA061TLCY\_A := FLCurrentYear - 1

X058AFName := getHRSPreload(1, "X058AFName", 2)

**intro2** (Section PreloadQ)

Before we start we would first like to retrieve some information that you provided to us in another survey. This may take a few moments. Please just click 'Next' to continue and wait until the next screen appears.

X060ASex := getHRSPReload(1, "X060ASex", 2)

X056AResStat := getHRSPreload(1, "X056AResStat", 2)

X061ARelateR := getHRSPreload(1, "X061ARelateR", 2)

E046\_NumGKids := getHRSPReload(2,"E046\_NumGKids")

H004\_OwnRent := getHRSPReload(2,"H004\_OwnRent")

H008\_OwnFarm := getHRSPReload(2,"H008\_OwnFarm")

H011\_OwnFarmLand := getHRSPReload(2,"H011\_OwnFarmLand")

H014\_OwnMobile := getHRSPReload(2,"H014\_OwnMobile")

H151\_Own2ndHome := getHRSPReload(2,"H151\_Own2ndHome")

Fill code of question FLTTwoYears executed

Fill code of question FLTTwoYearsCaps executed

Fill code of question FLOrYour executed

Fill code of question FLOrYourPar executed

Fill code of question FLAndYourPar executed

IF z076 = YES THEN

**intro3** (Section PreloadQ)

Thanks again for your patience! We are now ready to begin. Please just click 'Next>>' to continue.**Note:**

Some of the questions in this survey will show you information that you entered in a survey you took up to two years ago. If you don't recognize that information or it doesn't make sense in some way, please click the 'Remark' button and leave a comment in the box that pops up.

If you don't know the answer to a question, please click the 'Next>>' button twice.

ELSE

**intro3.2** (Section PreloadQ)

Thanks again for your patience! We are now ready to begin. Please just click 'Next>>'

to continue.

**Note:**

If you don't know the answer to a question, please click the 'Next>>' button twice.  
If you want to add clarifying information to your answer, please click the 'Remark' button  
and leave a comment in the box that pops up.

**END OF IF**

**Start of section Randomizers**

```
X501 := getHRSPreload(2, "X501")
X502 := getHRSPreload(2, "X502")
X503 := getHRSPreload(2, "X503")
X504 := getHRSPreload(2, "X504")
X505 := getHRSPreload(2, "X505")
X506 := getHRSPreload(2, "X506")
X507 := getHRSPreload(2, "X507")
X508 := getHRSPreload(2, "X508")
X509 := getHRSPreload(2, "X509")
X510 := getHRSPreload(2, "X510")
X511 := getHRSPreload(2, "X511")
X512 := getHRSPreload(2, "X512")
X513 := getHRSPreload(2, "X513")
X514 := getHRSPreload(2, "X514")
X515 := getHRSPreload(2, "X515")
X053 := getHRSPreload(2, "X053")
```

**IF Z076 = YES THEN**

```
x041 := getHRSPreloadWave3(5, "X041")
x042 := getHRSPreloadWave3(5, "X042")
x043 := getHRSPreloadWave3(5, "X043")
x044 := getHRSPreloadWave3(5, "X044")
x045 := getHRSPreloadWave3(5, "X045")
x046 := getHRSPreloadWave3(5, "X046")
x047 := getHRSPreloadWave3(5, "X047")
x048 := getHRSPreloadWave3(5, "X048")
x049 := getHRSPreloadWave3(5, "X049")
x050 := getHRSPreloadWave3(5, "X050")
x052 := getHRSPreloadWave3(5, "X052")
x051 := getHRSPreloadWave3(5, "X051")
x516 := getHRSPreloadWave3(5, "X516")
x517 := getHRSPreloadWave3(5, "X517")
x518 := getHRSPreloadWave3(5, "X518")
x519 := getHRSPreloadWave3(5, "X519")
```

```
| x520 := getHRSPreloadWave3(5,"X520")
```

```
ELSE
```

```
IF x041 = EMPTY THEN
```

```
  x041 := mt_rand(1,3)
  x042 := mt_rand(1,3)
  x043 := mt_rand(1,3)
  x044 := mt_rand(1,3)
  x045 := mt_rand(1,3)
  x046 := mt_rand(1,3)
  x047 := mt_rand(1,3)
  x048 := mt_rand(1,3)
  x049 := mt_rand(1,3)
  x050 := mt_rand(1,3)
  x052 := mt_rand(1,3)
  x051 := mt_rand(1,3)
  x516 := mt_rand(1,3)
  x517 := mt_rand(1,3)
  x518 := mt_rand(1,3)
  x519 := mt_rand(1,3)
  x520 := mt_rand(1,3)
```

```
END OF IF
```

```
END OF IF
```

End of section **Randomizers**

End of section **PreloadQ**

Start of section **SectionQ**

Fill code of question FLQspouse executed  
Fill code of question FLQspouse2 executed  
Fill code of question FLQ013 executed  
Fill code of question FLQ014A executed  
Fill code of question FLQ131 executed  
Fill code of question FLQ247 executed

```
IF A019.RAge > 64 OR A044TSpAge.A > 64 THEN
```

```
  Q010_ (R OR SP WORK FOR PAY - LCY in section SectionQ)
```

We are interested in how people are getting along financially these days. The next questions are about income you( or your ^FLHWP/) receive. Let's start with income from work.

Did you( or your ^FLHWP/) do any work for pay last year, in (LAST CALENDAR

YEAR())?

IF Q010\_ = 1 THEN

IF X065ACouplenss(1) IN (1,2,3,4) THEN

Q011\_ (WHO WORKED FOR PAY - LCY in section SectionQ)  
Which one of you worked for pay last year?

ELSE

Q011\_ := 1

END OF IF

ELSE

BP085cases := 1

END OF IF

ELSE

Q012\_ (R WORKED FOR PAY - LCY in section SectionQ)

We are interested in how people are getting along financially these days. The next questions are about income you( or your ^FLHWP/) receive. Some of these questions may seem similar to what we have already asked, however we would like to gather more detail.

Let's start with income from work.

Did you do any work for pay last year (that is, in (LAST CALENDAR YEAR()))?

IF X065ACouplenss(1) IN (1,2,3,4) THEN

Q013\_ (SP WORKED FOR PAY - LCY in section SectionQ)

Did your (^FLHWP) do any work for pay last year, in (LAST CALENDAR YEAR())?

END OF IF

END OF IF

IF BP085cases != 1 THEN

IF Q011\_ IN (1,3) OR Q012\_ = 1 THEN

Fill code of question FLQ014B executed

Fill code of question FLQ014C executed

Q014\_ (R INCOME FROM WORK SELF EMPL - LCY in section SectionQ)

(First we will ask about your earnings from work, and then about your ^FLQ014A.

/(In a previous survey you indicated that you were self-employed.

/(Did any of your earnings from work in (LAST CALENDAR YEAR()) come from self-employment?

IF Q014\_ = 1 THEN

**Q015\_** (R AMOUNT FROM WORK SELF EMPL LCY in section SectionQ)

What was your income from self-employment, before taxes and other deductions, in (LAST CALENDAR YEAR())?

Please include income you actually received from the business and any profits that may have been left in the business.

RANGE 0..1000000

**IF Q015\_ = EMPTY THEN**

**IF X041 = 1 THEN**

Q016\_Unf\_Random := 3

**ELSEIF X041 = 2 THEN**

Q016\_Unf\_Random := 5

**ELSE**

Q016\_Unf\_Random := 6

**END OF IF**

**Q016\_Unf** (Unfolding in section SectionQ)

Thinking about your self-employment income in (LAST CALENDAR YEAR()):

Was it more, about, or less than...

Q016\_Unf\_Results := explode("'", Q016\_Unf)

**END OF IF**

**END OF IF**

Fill code of question FLQ019 executed

**Q019\_** (R WAGES AND SALARY INCOME - LCY in section SectionQ)

(Aside from any self-employment income, did/Did) any of your (LAST CALENDAR YEAR()) earnings come from wages and salaries?

**IF Q019\_ = 1 THEN**

**Q020\_** (R AMOUNT FROM WAGES AND SALARY LCY in section SectionQ)

About how much wage and salary income did you receive in (LAST CALENDAR YEAR()), before taxes and other deductions?

RANGE 0..1000000

**IF Q020\_ = EMPTY THEN**

**IF X042 = 1 THEN**

Q021\_Unf\_Random := 3

**ELSEIF X042 = 2 THEN**

Q021\_Unf\_Random := 5



```

ELSE
| Q021_Unf.Random := 6
END OF IF

Q021_Unf (Unfolding in section SectionQ)
Thinking about your wage and salary income in (LAST CALENDAR YEAR()):

Was it more, about, or less than...

Q021_Unf.Results := explode("'", Q021_Unf)
END OF IF
END OF IF

Fill code of question FLQ024 executed

Q024_ (R INCOME FROM PROF PRAC OR TRADE - LCY in section SectionQ)
(Other than what you have already mentioned, did any of your ^InitA061TLCY.A
income come from a professional practice or trade?/Did any of your ^InitA061TLCY.A
income come from a professional practice or trade?)

IF Q024_ = 1 THEN
Q025_ (R AMOUNT FROM PROF PRAC OR TRADE LCY in section SectionQ)
About how much did you receive from professional practice or trade in (LAST
CALENDAR YEAR()), before taxes and other deductions?
RANGE 0..1000000

IF Q025_ = EMPTY THEN
IF X506 = 1 THEN
| Q026_Unf.Random := 5
ELSE
| Q026_Unf.Random := 6
END OF IF

Q026_Unf (Unfolding in section SectionQ)
Thinking about the income you received from your professional practice or trade in
(LAST CALENDAR YEAR()):

Was it more, about, or less than...

Q026_Unf.Results := explode("'", Q026_Unf)
END OF IF
END OF IF

```

**Q029\_** (R INCOME FROM TIP BONUS COMMISSION - LCY in section SectionQ)  
Other than what you have already mentioned, did any of your (LAST CALENDAR YEAR()) income come from tips, bonuses, commissions, etc?

**IF Q029\_ = 1 THEN**

**Q030\_** (R AMOUNT FROM TIP BONUS COMMISSION LCY in section SectionQ)  
About how much did your (LAST CALENDAR YEAR()) income from tips, bonuses, commissions, etc. amount to, before taxes and other deductions?  
RANGE 0..99999996

**IF Q030\_ = EMPTY THEN**

**IF X506 = 1 THEN**

| Q031\_Unf\_Random := 5

**ELSE**

| Q031\_Unf\_Random := 6

**END OF IF**

**Q031\_Unf** (Unfolding in section SectionQ)

Thinking about your income from tips, bonuses, commissions, etc. in (LAST CALENDAR YEAR()):

Was it more, about, or less than...

Q031\_Unf\_Results := explode('~', Q031\_Unf)

**END OF IF**

**END OF IF**

**Q034\_** (R OTHER INCOME FROM WORK 2ND JOB - LCY in section SectionQ)  
In (LAST CALENDAR YEAR()), did you receive any other income from work, such as a second job or the military reserves?

**IF Q034\_ = 1 THEN**

**Q035\_** (R AMOUNT FROM WORK 2ND JOB LCY in section SectionQ)  
How much did you receive from this work in (LAST CALENDAR YEAR()), before taxes and other deductions?  
RANGE 0..1000000

**IF Q035\_ = EMPTY THEN**

**IF X501 = 1 THEN**

| Q036\_Unf\_Random := 5

**ELSE**

| Q036\_Unf\_Random := 6

**END OF IF**

**Q036\_Unf** (Unfolding in section SectionQ)

Thinking about your income from this additional work in (LAST CALENDAR YEAR()):

Was it more, about, or less than...

Q036\_Unf\_Results := explode('~', Q036\_Unf)

**END OF IF**

**END OF IF**

**END OF IF**

**IF Q011\_ IN (2,3) OR Q013\_ = 1 THEN**

Fill code of question FLQ039 executed

**Q039\_** (SP INCOME FROM SELF EMPLOYMENT - LCY in section SectionQ)

(Now we want to ask about your (^FLHWP's) income last year, in ^InitA061TLCY\_A.

/)Did any of your (^FLHWP's) income come from self-employment?

**IF Q039\_ = 1 THEN**

**Q040\_** (SP AMOUNT FROM SELF EMPL INCOME LCY in section SectionQ)

What was your ((husband/wife/partner/spouse)'s) income from self-employment, before taxes and other deductions, in (LAST CALENDAR YEAR())?

Please include income your (husband/wife/partner/spouse) actually received from the business and any profits that may have been left in the business.

RANGE 0..1000000

**IF Q040\_ = EMPTY THEN**

**IF X516 = 1 THEN**

| Q041\_Unf\_Random := 3

**ELSEIF X516 = 1 THEN**

| Q041\_Unf\_Random := 5

**ELSE**

| Q041\_Unf\_Random := 6

**END OF IF**

**Q041\_Unf** (Unfolding in section SectionQ)

Thinking about your (husband/wife/partner/spouse)'s self-employment income in (LAST CALENDAR YEAR()):

Was it more, about, or less than...

Q041\_Unf\_Results := explode("'", Q041\_Unf)

END OF IF

END OF IF

Fill code of question FLQ044 executed

**Q044\_** (SP WAGES AND SALARY INCOME - LCY in section SectionQ)

(Apart from any self-employment income, did/Did) your (^FLHWP) have any income from wages and salaries last year, in (LAST CALENDAR YEAR())?

IF Q044\_ = 1 THEN

**Q045\_** (SP AMOUNT FROM WAGES AND SALARY LCY in section SectionQ)

About how much did your (^FLHWP's) income from wages and salaries amount to in (LAST CALENDAR YEAR()), before taxes and other deductions?

RANGE 0..1000000

IF Q045\_ = EMPTY THEN

IF X517 = 1 THEN

Q046\_Unf\_Random := 3

ELSEIF X517 = 2 THEN

Q046\_Unf\_Random := 5

ELSE

Q046\_Unf\_Random := 6

END OF IF

**Q046\_Unf** (Unfolding in section SectionQ)

Thinking about your (husband/wife/partner/spouse)'s income from wages and salaries in (LAST CALENDAR YEAR()):

Was it more, about, or less than...

Q046\_Unf\_Results := explode("'", Q046\_Unf)

END OF IF

END OF IF

Fill code of question FLQ049 executed

**Q049\_** (SP INCOME FROM PROF PRAC TRADE - LCY in section SectionQ)

(**Other than what you have already mentioned**, did any of your ^FLQ014A income in ^InitA061TLCY\_A come from a professional practice or trade?/Did any of your ^FLQ014A income in ^InitA061TLCY\_A come from a professional practice or trade?)

IF Q049\_ = 1 THEN

**Q050\_** (SP AMOUNT FROM PROF PRAC TRADE LCY in section SectionQ)

About how much income did your (^FLHWP) receive in (LAST CALENDAR YEAR()) from a professional practice or trade, before taxes and other deductions?

RANGE 0..1000000

IF Q050\_ = EMPTY THEN

IF X503 = 1 THEN

| Q051\_Unf\_Random := 5

ELSE

| Q051\_Unf\_Random := 6

END OF IF

**Q051\_Unf** (Unfolding in section SectionQ)

Thinking about the income your (husband/wife/partner/spouse) received from a professional practice or trade in (LAST CALENDAR YEAR()):

Was it more, about, or less than...

Q051\_Unf\_Results := explode('~', Q051\_Unf)

END OF IF

END OF IF

**Q054\_** (SP INCOME FROM TIP BONUS COMMISS - LCY in section SectionQ)

**Other than what you have already mentioned**, did any of your (^FLHWP's) (LAST CALENDAR YEAR()) income come from tips, bonuses, commissions, etc?

IF Q054\_ = 1 THEN

**Q055\_** (SP AMOUNT FR TIP BONUS COMMISS LCY in section SectionQ)

About how much did your (^FLHWP) receive from tips, bonuses, commissions, etc. in (LAST CALENDAR YEAR()), before taxes and other deductions?

RANGE 0..1000000

IF Q055\_ = EMPTY THEN

IF X504 = 1 THEN

| Q056\_Unf\_Random := 5

ELSE

| Q056\_Unf\_Random := 6

END OF IF

**Q056\_Unf** (Unfolding in section SectionQ)

Thinking about your (husband/wife/partner/spouse)'s income from tips, bonuses,

```

    commissions, etc. in (LAST CALENDAR YEAR()):

    Was it more, about, or less than...

    Q056_Unf_Results := explode("'", Q056_Unf)
  END OF IF
END OF IF

Q059_ (SP OTHER INC FROM WORK 2ND JOB - LCY in section SectionQ)
Did your (^FLHWP) receive any other income from work, such as a second job or the
military reserves?

IF Q059_ = 1 THEN
  Q060_ (SP AMOUNT FROM WORK 2ND JOB LCY in section SectionQ)
  How much did your (^FLHWP) receive from this work in (LAST CALENDAR YEAR()),
  before taxes and other deductions?
  RANGE 0..1000000

  IF Q060_ = EMPTY THEN
    IF X505 = 1 THEN
      Q061_Unf_Random := 5
    ELSE
      Q061_Unf_Random := 6
    END OF IF

    Q061_Unf (Unfolding in section SectionQ)
    Thinking about your (husband/wife/partner/spouse)'s income from this additional
    work in (LAST CALENDAR YEAR()):

    Was it more, about, or less than...

    Q061_Unf_Results := explode("'", Q061_Unf)
  END OF IF
END OF IF
END OF IF

Q064_ (R OR SP INCOME FROM UNEMPLOYMENT - LCY in section SectionQ)
Did you( or your ^FLHWP/) receive any income in (LAST CALENDAR YEAR()) from
Unemployment Compensation?

IF Q064_ = 1 THEN
  IF X065ACouplenss(1) IN (1,2,3,4) THEN

```

```

Q065_ (WHO RECEIVED INC FROM UNEMPLOYMENT LCY in section SectionQ)
Who received that Unemployment Compensation?

ELSE
| Q065_ := 1
END OF IF

IF Q065_ != 2 THEN
Fill code of question FLQ066 executed

Q066_ (R AMOUNT FROM UNEMPLOYMENT - LCY in section SectionQ)
(How much did you, yourself, receive from Unemployment Compensation in
^InitA061TLCY_A, before taxes and other deductions?/How much did you receive
from Unemployment Compensation in ^InitA061TLCY_A before taxes and other
deductions?)
RANGE 1..50000

IF Q066_ = EMPTY THEN
IF X506 = 1 THEN
| Q067_Unf_Random := 5
ELSE
| Q067_Unf_Random := 6
END OF IF

Fill code of question FLQ067 executed

Q067_Unf (Unfolding in section SectionQ)
(Thinking about the Unemployment Compensation you, yourself received in
^InitA061TLCY_A:

/Thinking about the Unemployment Compensation you received in
^InitA061TLCY_A:

)Was it more, about, or less than...

Q067_Unf_Results := explode("'", Q067_Unf)
END OF IF
END OF IF

IF Q065_ IN (2,3) THEN
Q070_ (SP AMOUNT FROM UNEMPLOYMENT - LCY in section SectionQ)
How much did your (^FLHWP) receive from Unemployment Compensation in (LAST
CALENDAR YEAR()), before taxes and other deductions?

```

```

RANGE 1..50000

IF Q070_ = EMPTY THEN
  IF X507 = 1 THEN
    Q071_Unf.Random := 5
  ELSE
    Q071_Unf.Random := 6
  END OF IF

  Q071_Unf (Unfolding in section SectionQ)
  Thinking about the Unemployment Compensation your (hus-
  band/wife/partner/spouse) received in (LAST CALENDAR YEAR()):

  Was it more, about, or less than...

  Q071_Unf.Results := explode(' ', Q071_Unf)
END OF IF
END OF IF
END OF IF

IF Q010_ = 1 OR Q012_ = 1 OR Q013_ = 1 THEN
  Q074_ (R OR SP INCOME FROM WORKERS COMP - LCY in section SectionQ)
  Did you( or your ^FLHWP/) receive any income in (LAST CALENDAR YEAR()) from
  Workers' Compensation?

  IF Q074_ = 1 THEN
    IF X065ACouplenss(1) IN (1,2,3,4) THEN
      Q075_ (WHO RECEIVED FROM WORKERS COMP LCY in section SectionQ)
      Who received that Workers' Compensation?
    ELSE
      Q075_ := 1
    END OF IF

    IF Q075_ != 2 THEN
      Fill code of question FLQ076 executed

      Q076_ (R AMOUNT FROM WORKERS COMP LCY in section SectionQ)
      (How much did you, yourself, receive from Worker's Compensation in
      ^InitA061TLCY_A, before taxes and other deductions?/How much did you re-
      ceive from Worker's Compensation in ^InitA061TLCY_A, before taxes and other
      deductions?)
      RANGE 1..50000
    
```



```
IF Q076_ = EMPTY THEN
```

```
  IF X508 = 1 THEN
```

```
    Q077_Unf.Random := 5
```

```
  ELSE
```

```
    Q077_Unf.Random := 6
```

```
  END OF IF
```

Fill code of question FLQ077 executed

**Q077\_Unf** (Unfolding in section SectionQ)

(Thinking about the **Workers Compensation** you, yourself, received in  
^InitA061TLCY\_A:

/Thinking about the **Workers Compensation** you received in ^InitA061TLCY\_A:

)Was it more, about, or less than...

Q077\_Unf.Results := explode('~', Q077\_Unf)

```
END OF IF
```

```
END OF IF
```

```
IF Q075_ IN (2,3) THEN
```

**Q080\_** (SP AMOUNT FROM WORKERS COMP LCY in section SectionQ)

How much did your (^FLHWP) receive from Worker's Compensation in (LAST  
CALENDAR YEAR()), before taxes and other deductions?

RANGE 1..50000

```
IF Q080_ = EMPTY THEN
```

```
  IF X509 = 1 THEN
```

```
    Q081_Unf.Random := 5
```

```
  ELSE
```

```
    Q081_Unf.Random := 6
```

```
  END OF IF
```

**Q081\_Unf** (Unfolding in section SectionQ)

Thinking about the Workers' Compensation your (husband/wife/partner/spouse)  
received in (LAST CALENDAR YEAR()):

Was it more, about, or less than...

Q081\_Unf.Results := explode('~', Q081\_Unf)

```
END OF IF
```

```
END OF IF
```

```
| | END OF IF  
| END OF IF  
END OF IF
```

```
IF J478 = 1 THEN
```

```
  Fill code of question FLQ085 executed
```

```
  Q085_ (R AMOUNT OF SS INCOME - LAST MONTH in section SectionQ)
```

```
  About the Social Security income that (you, yourself,/you/) receive, how much was that  
  Social Security check, or the amount deposited directly into an account, last month?
```

```
  Please report the amount after any deductions.
```

```
  RANGE 1..3000
```

```
  IF Q085_ = EMPTY THEN
```

```
    IF X511 = 1 THEN
```

```
      Q086_Unf_Random := 11
```

```
    ELSEIF X511 = 2 THEN
```

```
      Q086_Unf_Random := 10
```

```
    ELSE
```

```
      Q086_Unf_Random := 12
```

```
    END OF IF
```

```
  Q086_Unf (Unfolding in section SectionQ)
```

```
  Thinking about the Social Security income you received last month:
```

```
  Was it more, about, or less than...
```

```
  Q086_Unf_Results := explode('~', Q086_Unf)
```

```
END OF IF
```

```
IF Z125 != 1 THEN
```

```
  Q089_ (R YEAR STARTED TO RECEIVE SS BENEFITS in section SectionQ)
```

```
  In what year did you start to receive Social Security benefits?
```

```
  RANGE 1900..(CURRENT CALENDAR YEAR())
```

```
  IF Q089_ > FLCurrentYear - 3 THEN
```

```
    Q090_ (R MONTH STARTED TO RECEIVE SS BENEFITS in section SectionQ)
```

```
    What month was that?
```

```
  END OF IF
```

```
END OF IF
```

END OF IF

IF X065ACouplenss(1) IN (1,2,3,4) THEN

Fill code of question FLQ084 executed

**Q084\_** (SP SOCIAL SECURITY INCOME in section SectionQ)

(In an earlier survey you indicated that you are currently receiving Social Security income.

/In an earlier survey you indicated that you are not currently receiving Social Security income.

)Is your (^FLHWP) currently receiving any Social Security income?

IF Q084\_ = 1 THEN

**Q091\_** (SP AMOUNT OF SS INCOME - LAST MONTH in section SectionQ)

The next questions are about your (^FLHWP's) Social Security income.

How much was that Social Security check, or the amount deposited directly into an account, last month?

Please report the amount after any deductions.

RANGE 1..3000

IF Q091\_ = EMPTY THEN

IF X512 = 1 THEN

| Q092\_Unf\_Random := 11

ELSEIF X512 = 2 THEN

| Q092\_Unf\_Random := 10

ELSE

| Q092\_Unf\_Random := 12

END OF IF

**Q092\_Unf** (Unfolding in section SectionQ)

Thinking about the Social Security income your (husband/wife/partner/spouse) received last month:

Was it more, about, or less than...

Q092\_Unf\_Results := explode("'", Q092\_Unf)

END OF IF

IF Z126 != 1 THEN

```

Q095_ (SP YEAR STARTED TO RECEIVE SS BENEFITS in section SectionQ)
In what year did your (^FLHWP) start to receive Social Security benefits?

IF Q095_ > (FLCurrentYear - 3) THEN
  Q096_ (SP MONTH STARTED TO RECEIVE SS BENEFITS in section SectionQ)
  What month was that?
END OF IF
END OF IF
END OF IF
END OF IF

Q105_ (R OR SP INCOME FROM SSI - LAST MONTH in section SectionQ)
Did you( or your ^FLHWP/) receive any income last month from Supplemental Security Income, also called SSI?

(DEF: By "SSI", we mean the program administered by the Social Security Administration which makes assistance payments to low income, blind, disabled, and aged persons. A person may be receiving income from either SSI or from Social Security or both.)

IF Q105_ = 1 THEN
  IF X065ACouplenss(1) IN (1,2,3,4) THEN
    Q106_ (WHO RECEIVED INC FROM SSI LAST MONTH in section SectionQ)
    Which one of you received income from SSI?
  ELSE
    Q106_ := 1
  END OF IF

  Fill code of question FLQ107 executed

  Q107_ (AMOUNT RECEIVED FROM SSI LAST MONTH in section SectionQ)
  How much (did you and your ^FLQ013/did your ^FLQ013/did you) receive from SSI last month?
  RANGE 1..1500

  IF Q107_ = EMPTY THEN
    IF X513 = 1 THEN
      Q108_Unf_Random := 11
    ELSEIF X513 = 2 THEN
      Q108_Unf_Random := 10
    ELSE
      Q108_Unf_Random := 12
    END OF IF
  END OF IF

```

**END OF IF**

**Q108\_Unf** (Unfolding in section SectionQ)

Thinking about the SSI Income received last month:

Was it more, about, or less than...

Q108\_Unf\_Results := explode("'", Q108\_Unf)

**END OF IF**

Fill code of question FLQ111 executed

**IF Z127 != 1 THEN**

**Q111\_** (YEAR STARTED TO RECEIVE SSI INCOME in section SectionQ)

In what year did (you and your ^FLQ013/your ^FLQ013/you) start to receive SSI?

**IF Q111\_ > FLCurrentYear - 3 THEN**

**Q112\_** (MONTH STARTED TO RECEIVE SSI INCOME in section SectionQ)

What month was that?

**END OF IF**

**END OF IF**

**END OF IF**

**Q113\_** (R OR SP INCOME FR WELFARE NOT SSI - LCY in section SectionQ)

Did you( or your ^FLHWP/) receive any income from welfare in (LAST CALENDAR YEAR()), not including SSI?

Please do not include food stamps, also known as SNAP benefits, or other non-cash welfare programs.

**IF Q113\_ = 1 THEN**

**IF X065ACouplenss(1) IN (1,2,3,4) THEN**

**Q114\_** (WHO RECEIVED INC FR WELFARE NOT SSI LCY in section SectionQ)

Who received that welfare income?

**ELSE**

Q114\_ := 1

**END OF IF**

Fill code of question FLQ115 executed

**Q115\_** (AMOUNT FROM WELFARE LCY in section SectionQ)

How much did (you and your ^FLQ013/your ^FLQ013/you/) receive from welfare in (LAST CALENDAR YEAR())?

RANGE 1..50000

IF Q115\_ = EMPTY THEN

IF X507 = 1 THEN

Q116\_Unf\_Random := 5

ELSE

Q116\_Unf\_Random := 6

END OF IF

**Q116\_Unf** (Unfolding in section SectionQ)

Thinking about the income from welfare received in (LAST CALENDAR YEAR()):

Was it more, about, or less than...

Q116\_Unf\_Results := explode("'", Q116\_Unf)

END OF IF

END OF IF

**Q119\_** (R OR SP INC FR VETERAN BEN MILITARY PENS in section SectionQ)

Are you( or your ^FLHWP/) currently receiving any income from veteran benefits or a military pension?

IF Q119\_ = 1 THEN

IF X065ACouplenss(1) IN (1,2,3,4) THEN

**Q120\_** (WHO RECEIVES VET BEN MILITARY PENSION in section SectionQ)

Who receives these veteran benefits or a military pension?

ELSE

Q120\_ := 1

END OF IF

IF Q120\_ IN (1,3) THEN

Fill code of question FLQ121 executed

**Q121\_** (R AMT FR VETERAN BENEFITS - LAST MONTH in section SectionQ)

How much did (you, yourself,/you) receive last month from these veteran benefits or a military pension before taxes and other deductions?

RANGE 100..5000

IF Q121\_ = EMPTY THEN

IF Q122\_Unf\_Random = EMPTY THEN

Q122\_Unf\_Random := 11

END OF IF

```

Q122_Unf (Unfolding in section SectionQ)
Thinking about your income from veteran benefits or a military pension last month:

Was it more, about, or less than...

Q122_Unf_Results := explode("'", Q122_Unf)
END OF IF

Q125_ (R YEAR STARTED VETERAN BENEFITS in section SectionQ)
In what year did you start to receive these veteran benefits or a military pension?

IF Q125_ > FLCurrentYear - 3 THEN
  Q126_ (R MONTH STARTED VETERAN BENEFITS in section SectionQ)
  What month was that?
END OF IF
END OF IF

IF Q120_ IN (2,3) THEN
  Q127_ (SP AMT FR VETERAN BENEFITS - LAST MONTH in section SectionQ)
  How much did your (^FLHWP) receive last month from these veteran benefits or a
  military pension before taxes and other deductions?
  RANGE 100..5000

  IF Q127_ = EMPTY THEN
    IF Q128_Unf_Random = EMPTY THEN
      Q128_Unf_Random := 11
    END OF IF

    Q128_Unf (Unfolding in section SectionQ)
    Thinking of the income from veteran benefits or a military pension that your (hus-
    band/wife/partner/spouse) received last month:

    Was it more, about, or less than...

    Q128_Unf_Results := explode("'", Q128_Unf)
  END OF IF

  Q131_ (SP YEAR STARTED VETERAN BENEFITS in section SectionQ)
  In what year did (he/she/your spouse/your partner) start to receive these veteran
  benefits or a military pension?

  IF Q131_ > FLCurrentYear - 3 THEN

```

**Q132\_** (SP MONTH STARTED VETERAN BENEFITS in section SectionQ)  
What month was that?

**IF Q131\_ = FLCurrentYear AND Q132\_ > FLCurrentMonth THEN**

**date\_warning** (Section SectionQ)

You entered a month and year that is after the current date.

Please go back to review and correct your previous responses.

**END OF IF**

**END OF IF**

**END OF IF**

**END OF IF**

Fill code of question FLQ133 executed

**Q133\_** (REAL ESTATE ASSET in section SectionQ)

Savings and investments are an important part of family finances. The next questions ask about number of different kinds of savings or investments you may have.

Do you( or your ^FLHWP/) have any real estate(, other than your main home or second home/, other than your main home/, other than your second home/), such as land, rental real estate, or money owed to you on a land contract or mortgage?

Please do not include business or farm real estate.

1 Yes

5 No

**IF Q133\_ = 1 THEN**

q134\_compare := str\_replace(", ", "", q134\_compare)

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**Q134\_** (REAL ESTATE ASSET AMOUNT in section SectionQ)

If you sold all that real estate and then paid off any debts on it, about how much would you get?

RANGE 5000..1500000

**q134\_diffwarning** (Section SectionQ)

According to our records, the amount you entered differs greatly from your last survey in (January/February/March/April/May/June/July/August/September/October/November/December), ({}): \$(PRELOADED REAL ESTATE ASSET AMOUNT()). Please review your answer. If it is correct, select Next to continue. Otherwise please make the correction before



continuing.

**q134\_flag** (FLAG COMPARE REAL ESTATE ASSET AMOUNT in section PreloadQ)  
NUMBER (NO DECIMALS ALLOWED)

#### END OF GROUP

**IF Q134\_ = EMPTY THEN**

**IF X047 = 1 THEN**

| Q135\_Unf\_Random := 3

**ELSEIF X047 = 2 THEN**

| Q135\_Unf\_Random := 5

**ELSE**

| Q135\_Unf\_Random := 6

**END OF IF**

**Q135\_Unf** (Unfolding in section SectionQ)

Thinking about the value of your real estate, minus any debts:

Would it be more, about, or less than...

Q135\_Unf\_Results := explode("'", Q135\_Unf)

**END OF IF**

Fill code of question FLQ138 executed

**Q138\_** (RENTAL INCOME FROM THIS PROPERTY in section SectionQ)

Do you( or your ^FLHWP/) currently receive any income or rent from those properties?

**IF Q138\_ = 1 THEN**

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**Q139\_** (RENTAL INCOME RECEIVE HOW OFTEN in section SectionQ)

How often do you receive that rental income?

1 Weekly

2 Twice per month

3 Monthly

4 Quarterly

5 Every 6 months

6 Yearly

7 Other, please specify:

**Q140S** (HOW OFTEN RECEIVES REAL ESTATE INCOME- -OTHER SPECIFY  
in section SectionQ)

| STRING

END OF GROUP

IF Q139\_ IN (1,2,3,4,5) THEN

Fill code of question FLQ141 executed

Fill code of question FLQ141\_2 executed

**Q141\_** (RENTAL INCOME AMOUNT LAST PERIOD in section SectionQ)

Before any expenses or deductions, about how much **rental income** did you receive (last week/last month/last quarter/last time) from (that property/those properties)?

RANGE 0..99999996

IF Q141\_ != EMPTY THEN

**Q142\_** (RENTAL INC SAME AMOUNT PER PERIOD in section SectionQ)

Do you get about the same amount of rental income each (week/month/quarter/time)?

END OF IF

END OF IF

IF Q139\_ = EMPTY OR Q139\_ IN (6,7) OR Q142\_ != 1 THEN

**Q143\_** (RENTAL INCOME AMOUNT - LCY in section SectionQ)

Before any expenses or deductions, about how much did you receive from this rental income in (LAST CALENDAR YEAR())?

Please do not include rental income from a business or farm you own.

RANGE 1000..200000

IF Q143\_ = EMPTY THEN

IF X514 = 1 THEN

| Q144\_Unf\_Random := 11

ELSEIF X514 = 2 THEN

| Q144\_Unf\_Random := 10

ELSE

| Q144\_Unf\_Random := 12

END OF IF

**Q144\_Unf** (Unfolding in section SectionQ)

Thinking about your rental income in (LAST CALENDAR YEAR()):

Was it more, about, or less than...

Q144\_Unf\_Results := explode("'", Q144\_Unf)

```

| | END OF IF
| | END OF IF
| END OF IF
END OF IF

```

**Q147\_** (BUSINESS OR FARM ASSETS in section SectionQ)  
Do you( or your ^FLHWP/) own part or all of a business or farm?

**IF Q147\_ = 1 THEN**

```
q148.compare := str_replace(", ", "", q148.compare)
```

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**Q148\_** (BUSINESS OR FARM EQUITY AMOUNT in section SectionQ)  
If you sold all of these **business or farm assets** and then paid off any debts on them, about how much would you get?  
RANGE 5000..4000000

**q148.diffwarning** (Section SectionQ)  
According to our records, the amount you entered differs greatly from your last survey in (January/February/March/April/May/June/July/August/September/October/November/December), (()): \$(PRELOADED BUSINESS OR FARM EQUITY AMOUNT()). Please review your answer. If it is correct, select Next to continue. Otherwise please make the correction before continuing.

**q148.flag** (FLAG COMPARE AMOUNT in section PreloadQ)  
NUMBER (NO DECIMALS ALLOWED)

#### END OF GROUP

**IF Q148\_ = EMPTY THEN**

**IF X049 = 1 THEN**

```
| Q149_Unf_Random := 3
```

**ELSEIF X049 = 2 THEN**

```
| Q149_Unf_Random := 5
```

**ELSE**

```
| Q149_Unf_Random := 6
```

**END OF IF**

**Q149\_Unf** (Unfolding in section SectionQ)  
Thinking about how much you would get if you sold it and paid off any debts:

Would it be more, about, or less than...

Q149\_Unf\_Results := explode("'", Q149\_Unf)

END OF IF

**Q152\_** (BUSINESS OR FARM INCOME in section SectionQ)

Do you( or your ^FLHWP/) currently receive any income from those farms or businesses?

IF Q152\_ = 1 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**Q153\_** (BUSINESS OR FARM INC RECEIVE HOW OFTEN in section SectionQ)

How often do you receive that business or farm income?

- 1 Weekly
- 2 Twice per month
- 3 Monthly
- 4 Quarterly
- 5 Every 6 months
- 6 Yearly
- 7 Other, please specify:

**Q154S** (INCOME FROM FARM OR BUSINESS FREQUENCY- -OTHER in section SectionQ)

STRING

END OF GROUP

IF Q153\_ IN (1,2,3,4,5) THEN

Fill code of question FLQ155 executed

Fill code of question FLQ155\_2 executed

**Q155\_** (BUSINESS OR FARM INC AMT LAST PERIOD in section SectionQ)

About how much income did you receive (last week/last month/last quarter/last time) from that business or farm, before taxes and other deductions?

RANGE 0..99999996

IF Q155\_ = RESPONSE THEN

**Q156\_** (BUSINESS OR FARM INC SAME AMT PER PERIOD in section SectionQ)

Do you get about the same amount of business or farm income each (week/month/quarter/time)?

END OF IF

END OF IF

IF Q153\_ = EMPTY OR Q153\_ IN (6,7) OR Q156\_ != 1 THEN

**Q157\_** (BUSINESS OR FARM INCOME AMOUNT - LCY in section SectionQ)

About how much income did you( and your ^FLHWP) receive from any farms or businesses in (LAST CALENDAR YEAR()), before taxes and other deductions?

RANGE 2500..400000

**IF Q157\_ = EMPTY THEN**

**IF X510 = 1 THEN**

| Q158\_Unf\_Random := 6

**ELSE**

| Q158\_Unf\_Random := 5

**END OF IF**

**Q158\_Unf** (Unfolding in section SectionQ)

Thinking about your income from any farms or businesses in (LAST CALENDAR YEAR()):

Was it more, about, or less than...

Q158\_Unf\_Results := explode('...', Q158\_Unf)

**END OF IF**

**END OF IF**

**END OF IF**

**END OF IF**

**Q162\_** (IRA OR KEOGH in section SectionQ)

Do you( or your ^FLHWP/) currently have any money or assets that are held in an Individual Retirement Account, that is, in an IRA or KEOGH account?

SEP-IRAs that were created from self-employment should be included here.

**IF Q162\_ = 1 THEN**

**Q163\_** (NUMBER OF IRA OR KEOGH ACCOUNTS in section SectionQ)

How many IRA or KEOGH accounts do you( and your ^FLHWP) have?

1 One

2 Two

3 Three

4 More than 3

**IF Q163\_ = 1 OR Q163\_ = EMPTY THEN**

| IRAtot := 1

**ELSEIF Q163\_ = 2 THEN**

| IRAtot := 2

**ELSE**

| IRAtot := 3

END OF IF

LOOP FROM 1 TO IRATOT

IF X065ACouplenss(1) IN (1,2,3,4) THEN

Fill code of question FLQ165Q1 executed

Fill code of question FLQ165Q2 executed

Fill code of question FLQ165A executed

**Q165\_ (WHO HAS IRA ACCOUNTS in section SectionQ)**

Thinking about (the largest **IRA or KEOGH account**,/the other **IRA or KEOGH account**,/the next largest **IRA or KEOGH account**,/the third IRA or KEOGH account,/all the other **IRA or KEOGH accounts**,/all the IRA or KEOGH accounts,/the **IRA or KEOGH account**,) (are these yours or your ^FLQ014A?/is that yours or your ^FLQ014A?)

1 My account

2 (My (husband/wife/partner/spouse)'s account)

3 (My (husband/wife/partner/spouse)'s and my accounts)

ELSE

| Q165\_(IRAcnt) := 1

END OF IF

Fill code of question FLQ166Q1 executed

Fill code of question FLQ166Q2 executed

**Q166\_ (AMOUNT IN IRA ACCOUNT in section SectionQ)**

(Thinking about the largest **IRA or KEOGH account**, /Thinking about the other **IRA or KEOGH account**, /Thinking about the next largest **IRA or KEOGH account**, /Thinking about the third **IRA or KEOGH account**, /Thinking about all the other **IRA or KEOGH accounts**, /Thinking about all the **IRA or KEOGH account**, /Thinking about the **IRA or KEOGH account**, /)(about how much in total is in these other IRA or KEOGH accounts/about how much in total is in these IRA or KEOGH accounts/about how much is in this account/About how much in total is in these other IRA or KEOGH accounts/About how much in total is in these IRA or KEOGH accounts/About how much is in this account) at the present time?

RANGE 5000..250000

IF Q166\_(IRAcnt) = EMPTY THEN

IF X043 = 1 THEN

| Q167\_Unf.Random(IRAcnt) := 3

ELSEIF X043 = 2 THEN

| Q167\_Unf.Random(IRAcnt) := 5

ELSE

| Q167\_Unf.Random(IRAcnt) := 6

END OF IF

**Q167\_Unf** (Unfolding in section SectionQ)  
Thinking about that IRA or KEOGH account:

Is it more, about, or less than...

Q167\_Unf.Results(IRAcnt) := explode("'", Q167\_Unf(IRAcnt))

END OF IF

Fill code of question FLQ537 executed

**Q537\_** (Rollover from a job-related pension plan in section SectionQ)  
Did any of the money in (any of these **IRA or KEOGH accounts**/this **IRA or KEOGH account**) come from a rollover from a job-related pension plan?

IF Q537\_(IRAcnt) = 1 THEN

| IF IRAcnt IN (1,2) AND Q163\_ != EMPTY THEN

| **Q538\_** (All Rollover from a job-related pension plan in section SectionQ)  
Did all of the money in this IRA or KEOGH account come from a rollover from a job-related pension plan?

| END OF IF

END OF IF

Fill code of question FLQ513 executed

**Q513\_** (IF IRA/KEO INVESTED STOCKS/MUT FUNDS in section SectionQ)

(Is any of that **IRA or KEOGH**/Are any of those **IRAs or KEOGHs**) invested in stocks or mutual funds?

**IF Q513\_(IRAcnt) = 1 THEN**

**Q514\_** (IRA - PERCENT IN STOCK OR MUTUAL FUND in section SectionQ)  
About what percent is invested in stocks or mutual funds?

Please enter whole numbers only, 1-100.  
RANGE 1..100

**IF Q514\_(IRAcnt) = EMPTY THEN**

**Q515\_** (IRA - PCT IN STOCK OR MUT FUND GT-LT 50 in section SectionQ)

Is it less than 50 percent, more than 50 percent, or what?

1 Less than 50 percent

3 About 50 percent

5 More than 50 percent

**END OF IF**

**END OF IF**

Fill code of question FLQ170 executed

**Q170\_** (WITHDRAWN ANY MONEY FROM IRA in section SectionQ)

Have you( or your ^FLHWP/) withdrawn any money or received any payments from (these accounts/this account) (in the last two years/since ^z092, ^z093)?

**IF Q170\_(IRAcnt) = 1 THEN**

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**Q171\_** (AMOUNT WITHDRAWN FROM IRA ACCOUNT in section SectionQ)

Altogether, about how much money did you( or your ^FLHWP/) withdraw from (these accounts/this account) (in the last two years/since ^z092, ^z093), before taxes and other deductions?

RANGE 0..99999996

**Q175\_** (AMOUNT WITHDRAWN IRA ACCOUNTS - PER in section SectionQ)

Per:

1 In total

3 Month

4 Quarter

5 6 month



6 Year  
7 Other, please specify:

**Q176S** (AMT WITHDR FR IRA ACCOUNT - SPECIFY in section SectionQ)  
You selected an interval of 'Other'. Please specify.  
STRING

END OF GROUP

IF Q171\_(IRAcnt) = EMPTY THEN

IF X501 = 1 THEN

Q172\_Unf\_Random(IRAcnt) := 5

ELSE

Q172\_Unf\_Random(IRAcnt) := 6

END OF IF

Fill code of question FLQ172A executed  
Fill code of question FLQ172B executed

**Q172\_Unf** (Unfolding in section SectionQ)  
Thinking about the money you( or your ^FLHWP/) withdrew from (this IRA or KEOGH account/these IRA or KEOGH accounts) (since ^Z092, ^Z093/in the last two years):

Was it more, about, or less than...

Q172\_Unf\_Results(IRAcnt) := explode("'", Q172\_Unf(IRAcnt))

END OF IF

**Q177\_** (IRA MONEY MINIMUM WITHDRAWAL in section SectionQ)  
Did you( or your ^FLHWP/) take out only the 'minimum withdrawal option', that is, the amount required to avoid a tax penalty?

END OF IF

END OF LOOP

END OF IF

**Q182\_** (CASH OR CONVERT OTHER IRA-KEOGH in section SectionQ)  
Did you( or your ^FLHWP/) cash in or convert any IRA or KEOGH accounts to annuities at any time (in the last two years/since ^z092, ^z093)?

IF Q182\_ = 1 THEN

IF X065ACouplenss(1) IN (1,2,3,4) THEN

**Q183\_** (WHOSE IRA WAS CASHED OR CONVERTED in section SectionQ)  
Was that your IRA or KEOGH or your (husband/wife/partner/spouse)'s?

ELSE

Q183\_ := 1

END OF IF

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**Q184M** (IRA-KEOGH CASHED OR CONVERTED in section SectionQ)  
Did you( or your ^FLHWP/) cash in these IRA or KEOGH accounts, convert them to annuities, or what? Please choose all that apply.  
1 Cashed in account  
2 Converted to annuity  
7 Other, please specify:

**Q185S** (IRA-KEOGH CASHED OR CONVERTED-SPECIFY in section SectionQ)  
STRING

END OF GROUP

IF 2 IN Q184M THEN

**Q186\_** (AMOUNT CONVERTED TO ANNUITIES in section SectionQ)  
About how much money in IRA or KEOGH accounts was converted to annuities?  
RANGE 0..99999996

IF Q186\_ = EMPTY THEN

IF X502 = 1 THEN

Q187\_Unf\_Random := 5

ELSE

Q187\_Unf\_Random := 6

END OF IF

**Q187\_Unf** (Unfolding in section SectionQ)  
Thinking about the money converted to annuities:

Was it more, about, or less than...

| Q187\_Unf\_Results := explode("'", Q187\_Unf)

END OF IF

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**Q190\_** (INC FROM OTHER IRA ANNUITY AMOUNT in section SectionQ)

About how much do you( or your ^FLHWP/) receive from these annuities converted from IRA or KEOGH accounts, before taxes and other deductions?

Please enter zero if you are not yet receiving income from these annuities.

RANGE 0..99999996

**Q194\_** (INC FROM OTHER IRA ANNUITY PER in section SectionQ)

Per:

3 Month

4 Quarter

5 6 Month

6 Year

7 Other, please specify:

**Q195S** (OTHER IRA RECEIVE AMT PER - SPECIFY in section SectionQ)

You chose an interval of 'Other". Please specify.

STRING

#### END OF GROUP

IF Q190\_ = EMPTY THEN

IF X503 = 1 THEN

| Q191\_Unf\_Random := 5

ELSE

| Q191\_Unf\_Random := 6

END OF IF

**Q191\_Unf** (Unfolding in section SectionQ)

Thinking about the money received from this annuity:

Per month, is it more, about, or less than...

Q191\_Unf\_Results := explode("'", Q191\_Unf)

END OF IF

IF Q190\_ = EMPTY OR Q190\_ > 0 THEN

**Q196\_** (INC TAX ON OTHER IRA PAYMENT in section SectionQ)

Are federal income taxes withheld on these payments from annuities converted from IRA or KEOGH accounts?

**Q197\_** (YEAR STARTED ANNUITY INC FR OTHER IRA in section SectionQ)

In what year did you( or your ^FLHWP/) start to receive these annuities from IRA or KEOGH accounts?

**IF Q197\_ > FLCurrentYear - 3 THEN**

**Q198\_** (MONTH STARTED ANNUITY INC FR OTHER IRA in section SectionQ)

What month was that?

**END OF IF**

Fill code of question FLQ202A executed

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**Q202\_** (HOW LONG WILL RECV ANNUITY in section SectionQ)

For how long will these annuity payments continue?

Please select one of the following:

2 For a fixed period:

3 ()

4 As long as I live

5 ()

6 Until the money runs out

7 Other, please specify:

**Q201\_** (NUMBER YRS RECV ANNUITY FROM OTHER IRA in section SectionQ)

RANGE 0..96

**Q203S** (HOW LONG RECV ANNUITY - SPECIFY in section SectionQ)

STRING

**END OF GROUP**

**END OF IF**

**END OF IF**

**IF 1 IN Q184M THEN**

**Q204\_** (AMT WITHDRAWN FROM OTHER IRA in section SectionQ)

About how much money was withdrawn or cashed in from these IRA or KEOGH accounts?

RANGE 0..99999996

```

IF Q204_ = EMPTY THEN
  IF Q205_Unf_Random = EMPTY THEN
    Q205_Unf_Random := 11
  END OF IF

  Q205_Unf (Unfolding in section SectionQ)
  Thinking about the money from any IRA or KEOGH accounts you cashed in:

  Was it more, about, or less than...

  Q205_Unf_Results := explode("'", Q205_Unf)
END OF IF
END OF IF
END OF IF

```

**Q215\_** (R OR SP INCOME FROM ANY OTHER RETIREMENT PENSIONS in section SectionQ)

Not including Social Security or other retirement income you may have already mentioned, are you( or your ^FLHWP/) currently receiving any other income from retirement pensions?

Please do not include any lump-sum pension payments or military pension reported earlier.

```

IF Q215_ = 1 THEN
  IF X065ACouplenss(1) IN (1,2,3,4) THEN
    Q216_ (WHO REC PENSION RETIREMENT INC in section SectionQ)
    Who receives that income from retirement pensions?

  ELSE
    Q216_ := 1
  END OF IF

  IF Q216_ IN (1,3) THEN
    Fill code of question FLQ217 executed
    Fill code of question FLQ217A executed

    Q217_ (R INCOME FR MORE THAN ONE PENSION in section SectionQ)
    (First we will ask about your retirement pensions, then about your ^FLHWP's.

    )Do you(, yourself,/) receive income from more than one retirement pension?

  IF Q217_ = 1 THEN

```

**Q218\_** (NUMBER OF PENSIONS R RECEIVED in section SectionQ)  
How many retirement pensions do you receive? Please enter zero if none.  
RANGE 0..50

ELSE

| Q218\_ := 1

END OF IF

IF Q218\_ > 0 THEN

| IF Q218\_ = 1 THEN

| | PENtot := 1

ELSE

| | PENtot := 2

END OF IF

LOOP FROM 1 TO PENTOT

| Fill code of question FLQ220 executed

| IF PENcnt = 1 THEN

| | Q220\_maximum := 10000

ELSE

| | IF Q220\_(1) = RESPONSE THEN

| | | Q220\_maximum := str\_replace(",","",Q220\_(1))

| | ELSE

| | | Q220\_maximum := 10000

| | END OF IF

| END OF IF

**Q220\_** (R AMOUNT RECV FR PENSION LAST MONTH in section SectionQ)  
(Please think about the largest pension that **you** currently receive.

How much did you receive last month from that/How much did **you** receive last month from the **second**/How much did **you** receive last month from the **second largest**/How much did **you** receive last month from that) pension, before taxes and other deductions?

RANGE 250..(USED IN VALIDATION CHECK OF Q220())

IF Q220\_(PENcnt) = EMPTY THEN

IF X504 = 1 THEN

Q221\_Unf\_Random(PENcnt) := 5

ELSE

Q221\_Unf\_Random(PENcnt) := 6

END OF IF

**Q221\_Unf** (Unfolding in section SectionQ)

Thinking about the income from that pension last month:

Was it more, about, or less than...

Q221\_Unf\_Results(PENcnt) := explode("'", Q221\_Unf(PENcnt))

END OF IF

**Q224\_** (R TAX WITHHELD ON PENSION in section SectionQ)

Were any federal income taxes withheld on that income from your retirement pension?

**Q225\_** (R PENS CHOOSE DIFF AMT NEXT MONTH in section SectionQ)

If you wanted to, could you choose to receive a larger or smaller amount from that pension next month?

**Q226\_** (R COULD WITHDRAW SOME- ALL THIS MONTH in section SectionQ)

Could you withdraw some or all of the money from that pension plan this month?

IF Q226\_(PENcnt) = 1 THEN

**Q227\_** (R AMOUNT IN PENSION ACCT in section SectionQ)

About how much is in this pension account?

RANGE 0..99999996

IF Q227\_(PENcnt) = EMPTY THEN

IF X515 = 1 THEN

| Q228.Unf.Random(PENcnt) := 11

ELSEIF X515 = 2 THEN

| Q228.Unf.Random(PENcnt) := 10

ELSE

| Q228.Unf.Random(PENcnt) := 12

END OF IF

**Q228.Unf** (Unfolding in section SectionQ)

Thinking about the money in this pension account:

Is it more, about, or less than...

Q228.Unf.Results(PENcnt) := explode("'", Q228.Unf(PENcnt))

END OF IF

END OF IF

**Q231\_** (R YEAR PENSION STARTED in section SectionQ)

In what year did you first begin to receive that pension?

IF Q231\_(PENcnt) > FLCurrentYear - 3 THEN

| **Q232\_** (R MONTH PENSION STARTED in section SectionQ)

| What month was that?

END OF IF

**Q233\_** (R PENSION PMT- IF COLA ADJUSTMENT in section SectionQ)

Is the pension payment automatically adjusted for changes in the cost of living?

**Q234\_** (R PENSION PAYMENT CONTINUE FOR LIFE in section SectionQ)

Will this payment from your retirement pension continue for as long as you live?

IF Q234\_(PENcnt) = 5 THEN



**Q235\_** (R HOW LONG PENSION PMT CONTINUE in section SectionQ)  
For how many years will it continue?  
NUMBER (NO DECIMALS ALLOWED)

**END OF IF**

Fill code of question FLQ236 executed

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**Q236\_** (R PENSION CHANGE AT DEATH in section SectionQ)  
If you were to die( before then,/,) would the payment from your retirement pension stop, continue unchanged, or continue at a reduced level?  
1 Stop  
2 Continue unchanged  
3 Continue at reduced level  
7 Other, please specify:

**Q237S** (R PENSION STOP W/ DEATH - SPECIFY in section SectionQ)  
STRING

**END OF GROUP**

**END OF LOOP**

**IF Q218\_ > 2 THEN**

**Q238\_** (AMOUNT RECEIVED OTHER PENSIONS LAST MO in section SectionQ)  
About the other retirement pensions that you receive, please indicate about how much in total you received last month, before taxes and other deductions?  
RANGE 250..10000

**IF Q238\_ = EMPTY THEN**

**IF Q239\_Unf\_Random = EMPTY THEN**

Q239\_Unf\_Random := 11

**END OF IF**

**Q239\_Unf** (Unfolding in section SectionQ)

Thinking about the income from your other retirement pensions last month:

Was it more, about, or less than...

Q239\_Unf\_Results := explode("'", Q239\_Unf)

**END OF IF**

```

| | Q242_ (TAXES W/HELD OTR PENSIONS in section SectionQ)
| | Were any federal income taxes withheld on these other retirement pensions that
| | you receive?
| | END OF IF
| END OF IF
END OF IF

IF Q216_ IN (2,3) THEN
| Fill code of question FLQ243 executed

| Q243_ (SP INCOME FROM MORE THAN ONE PENSION in section SectionQ)
| (Now we want to ask you about the retirement pensions received by your ^FLHWP.

|/)Does (he/she/your spouse/your partner) currently receive more than one such
| pension?

| IF Q243_ = 1 THEN
| | Q244_ (SP NUMBER OF PENSIONS in section SectionQ)
| | How many such pensions does your (husband/wife/partner/spouse) receive?
| | RANGE 0..20
| ELSE
| | Q244_ := 1
| END OF IF

| IF Q244_ > 0 THEN
| | IF Q244_ = 1 THEN
| | | PENtotSP := 1
| | ELSE
| | | PENtotSP := 2
| | END OF IF

| LOOP FROM 1 TO PENTOTSP

| | Fill code of question FLQ246 executed

| | IF PENcnt = 1 THEN
| | | Q246_maximum := 10000
| | ELSE
| | | IF Q246_(1) = RESPONSE THEN

```

| Q246\_maximum := str\_replace(",","",Q246\_(1))

ELSE

| Q246\_maximum := 10000

END OF IF

END OF IF

**Q246\_** (SP AMOUNT RECV FR PENSION - LAST MONTH in section SectionQ)

(Please think about the largest pension that **your ^FLHWP currently receives.**

How much did ^FLQ131 receive last month from the largest/How much did ^**FLQ131** receive last month from the other/How much did ^**FLQ131** receive last month from the next largest/How much did ^**FLQ131** receive last month from that) pension, before taxes and other deductions?

RANGE 250..(USED IN VALIDATION CHECK OF Q246(2)())

IF Q246\_(PENcnt) = EMPTY THEN

| IF X505 = 1 THEN

| Q247\_Unf\_Random(PENcnt) := 5

ELSE

| Q247\_Unf\_Random(PENcnt) := 6

END OF IF

**Q247\_Unf** (Unfolding in section SectionQ)

Thinking about (his/her/your spouse's/your partner's) income from that pension last month:

Was it more, about, or less than...

Q247\_Unf\_Results(PENcnt) := explode("'", Q247\_Unf(PENcnt))

END OF IF

**Q250\_** (SP TAX WITHHELD ON PENSION in section SectionQ)

Were any federal income taxes withheld on that income from your (hus-

band/wife/partner/spouse)'s retirement pension?

**Q251\_** (SP PENS CHOOSE DIFF AMT NEXT MONTH in section SectionQ)

If (he/she/your spouse/your partner) wanted to, could (he/she/your spouse/your partner) choose to receive a larger or smaller amount from that pension next month?

**Q252\_** (SP COULD WITHDRAW SOME- ALL THIS MONTH in section SectionQ)

Could (he/she/your spouse/your partner) withdraw some or all of the money from that pension plan this month?

IF Q252\_(PENcnt) = 1 THEN

**Q253\_** (SP AMOUNT IN PENSION ACCT in section SectionQ)

About how much money is in this pension account?

RANGE 0..99999996

IF Q253\_(PENcnt) = EMPTY THEN

IF X516 = 1 THEN

Q254\_Unf\_Random(PENcnt) := 11

ELSEIF X516 = 2 THEN

Q254\_Unf\_Random(PENcnt) := 10

ELSE

Q254\_Unf\_Random(PENcnt) := 12

END OF IF

**Q254\_Unf** (Unfolding in section SectionQ)

Thinking about the money in that pension account:

Is it more, about, or less than...

Q254\_Unf\_Results(PENcnt) := explode("'", Q254\_Unf(PENcnt))

END OF IF

END OF IF

**Q257\_** (SP YEAR PENSION STARTED in section SectionQ)

In what year did (he/she/your spouse/your partner) first begin to receive that pension?

IF Q257\_(PENcnt) > FLCurrentYear - 3 THEN

Q258\_ (SP MONTH PENSION STARTED in section SectionQ)  
What month was that?

END OF IF

Q259\_ (SP IF COLA ADJUSTMENT - PENSION in section SectionQ)  
Is the pension payment automatically adjusted for changes in the cost of living?

Q260\_ (SP PENSION PAYMENT CONTINUE FOR LIFE in section SectionQ)  
Will this payment from your (husband/wife/partner/spouse)'s retirement pension continue for as long as (he/she/your spouse/your partner) lives?

IF Q260\_(PENcnt) = 5 THEN

Q261\_ (SP HOW LONG PENSION PMT CONTINUE in section SectionQ)  
For how many years will it continue?  
NUMBER (NO DECIMALS ALLOWED)

END OF IF

Fill code of question FLQ262 executed

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

Q262\_ (SP PENSION CHANGE AT DEATH in section SectionQ)  
(If ^FLQ131 were to die before then,/If ^FLQ131 were to die,) would the payment from your (husband/wife/partner/spouse)'s retirement pension stop, continue unchanged, or continue at a reduced level?  
1 Stop  
2 Continue unchanged  
3 Continue at reduced level  
7 Other, please specify:

Q263S (SP PENSION STOP W/ DEATH - SPECIFY in section SectionQ)  
STRING

END OF GROUP

END OF LOOP

END OF IF

IF Q216\_ IN (2,3) AND Q244\_ > 2 THEN

**Q264\_** (SP ALL OTH PENS AMOUNT REC - LAST MONTH in section SectionQ)  
About the other retirement pensions (he/she/your spouse/your partner) receives,  
about how much in total did (he/she/your spouse/your partner) receive last month,  
before taxes and other deductions?  
RANGE 0..99999996

IF Q264\_ = EMPTY THEN

IF Q265\_Unf\_Random = EMPTY THEN

Q265\_Unf\_Random := 11

END OF IF

**Q265\_Unf** (Unfolding in section SectionQ)  
Thinking about (his/her/your spouse's/your partner's) income from any other retire-  
ment pensions last month:

Was it more, about, or less than...

Q265\_Unf\_Results := explode("", Q265\_Unf)

END OF IF

**Q268\_** (SP OTH PENS AMT TAXES W/HELD in section SectionQ)  
Were any federal income taxes withheld on these?

END OF IF

END OF IF

IF Q216\_ = EMPTY THEN

**Q269\_** (AMOUNT R-SP PENSION RECD LAST MONTH in section SectionQ)  
Overall, about how much did you( and your ^FLHWP) receive last month from retirement  
pensions, not including Social Security?  
RANGE 0..99999996

IF Q269\_ = EMPTY THEN

IF X517 = 1 THEN

Q270\_Unf\_Random := 11

ELSEIF X517 = 2 THEN

Q270\_Unf\_Random := 10

ELSE

Q270\_Unf\_Random := 12

END OF IF

```

| Q270_Unf (Unfolding in section SectionQ)
| Thinking about the total income you( and your ^FLHWP) received from retirement
| pensions last month:
|
| Was it more, about, or less than...
|
| Q270_Unf_Results := explode("'", Q270_Unf)
| END OF IF
| END OF IF
| END OF IF

```

**Q273\_** (R OR SP INCOME FROM ANNUITIES in section SectionQ)  
Are you( or your ^FLHWP/) currently receiving any income from annuities?

```

| IF Q273_ = 1 THEN

```

```

| IF X065ACouplenss(1) IN (1,2,3,4) THEN

```

```

| Q274_ (WHO RECEIVED INC FROM ANNUITIES in section SectionQ)
| Who receives that income from annuities?

```

```

| ELSE

```

```

| Q274_ := 1

```

```

| END OF IF

```

```

| IF Q274_ IN (1,3) THEN

```

```

| Fill code of question FLQ275 executed

```

**Q275\_** (R INCOME FROM MORE THAN ONE ANNUITY in section SectionQ)  
(First we will ask about your annuity payments, then about your ^FLQ014A.

Do you, yourself, receive income from more than one annuity?/Do you receive income from more than one annuity?)

```

| IF Q275_ = 1 THEN

```

```

| Q276_ (R NUMBER OF ANNUITIES INCOME in section SectionQ)
| How many annuities do you receive?
| RANGE 1..50

```

```

| ELSE

```

```

| Q276_ := 1

```

```

| END OF IF

```

```

| IF Q276_ = 1 THEN

```

```

| ANNtot := 1

```

```

| ELSE

```

```
| ANNtot := 2
```

```
END OF IF
```

```
LOOP FROM 1 TO ANNTOT
```

```
| Fill code of question FLQ278 executed
```

```
| IF ANNcnt = 1 THEN
```

```
| | Q278_maximum := 10000
```

```
ELSE
```

```
| IF Q278_(1) = RESPONSE THEN
```

```
| | Q278_maximum := str_replace(",","",Q278_(1))
```

```
ELSE
```

```
| | Q278_maximum := 10000
```

```
END OF IF
```

```
END OF IF
```

**Q278\_** (R AMOUNT FROM ANNUITY - LAST MONTH in section SectionQ)  
(Please think about the largest annuity payment that **you** currently receive.

How much did you receive last month from that annuity,/How much did **you** receive last month from the **second annuity payment**,/How much did **you** receive last month from the **second largest annuity payment**,/How much did **you** receive last month from that annuity,) before taxes and other deductions?

Please enter zero if annuity payments have not started yet or you did not receive a payment last month.

RANGE 250..(USED IN VALIDATION CHECK OF Q278())

```
IF Q278_(ANNcnt) = EMPTY THEN
```

```
| IF X506 = 1 THEN
```

```
| | Q279_Unf_Random(ANNcnt) := 5
```

```
ELSE
```



Q279\_Unf.Random(ANNcnt) := 6

END OF IF

**Q279\_Unf** (Unfolding in section SectionQ)

Thinking about the income from that annuity last month:

Was it more, about, or less than...

Q279\_Unf.Results(ANNcnt) := explode("'", Q279\_Unf(ANNcnt))

ELSEIF Q278\_(ANNcnt) = 0 THEN

**Q524\_** (R INCOME FROM ANNUITY - LAST YEAR in section SectionQ)

Did you get any income from this annuity last year?

IF Q524\_(ANNcnt) = 1 THEN

**Q525\_** (R AMOUNT FROM ANNUITY - LAST YEAR in section SectionQ)

How much in total did you receive from this annuity last year, before taxes and other deductions?

RANGE 0..99999996

END OF IF

END OF IF

IF Q278\_(ANNcnt) > 0 OR Q278\_(ANNcnt) = EMPTY OR (Q278\_(ANNcnt) = 0 AND Q524\_(ANNcnt) = 1) THEN

**Q282\_** (R TAXES WITHHELD FROM ANNUITY PMT in section SectionQ)

Were any federal income taxes withheld on that annuity?

**Q283\_** (R YEAR ANNUITY PMT STARTED in section SectionQ)

In what year did you start to receive that annuity payment?

IF Q283\_(ANNcnt) > FLCurrentYear - 3 THEN

**Q284\_** (R MONTH ANNUITY PMT STARTED in section SectionQ)

What month was that?

END OF IF

**Q285\_** (R ANNUITY PMT- IF COLA ADJUSTMENT in section SectionQ)

Is the annuity payment automatically adjusted for changes in the cost of living?

**Q286\_** (R ANNUITY PMT CONTINUE FOR LIFE in section SectionQ)

Will this payment from your annuity continue for as long as you live?

**IF Q286\_(ANNcnt) = 5 THEN**

**Q287\_** (R HOW LONG ANNUITY PMT CONTINUE in section SectionQ)

For how many years will it continue?

RANGE 0..100

**END OF IF**

Fill code of question FLQ288 executed

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**Q288\_** (R ANNUITY PMT CHANGE AT DEATH in section SectionQ)

If you were to die( before then,/,) would the payment from your annuity stop, continue unchanged, or continue at a reduced level?

1 Stop

2 Continue unchanged

3 Continue at a reduced level

7 Other, please specify:

**Q289S** (R ANNUITY PMT CHANGE AT DEATH-SPECIFY in section SectionQ)

STRING

**END OF GROUP**

**END OF IF**

**END OF LOOP**

**IF Q276\_ > 2 THEN**

**Q290\_** (R OTHER ANNUITIES - AMOUNT RECD LAST MO in section SectionQ)

About the other annuity payments that you receive, about how much in total did you receive last month, before taxes and other deductions?

Please enter zero if annuity payments have not started yet or you did not receive a payment last month.

RANGE 250..20000

**IF Q290\_ = EMPTY THEN**

```

IF Q291_Unf_Random = EMPTY THEN
| Q291_Unf_Random := 11
END OF IF

Q291_Unf (Unfolding in section SectionQ)
Thinking about the income from those other annuity payments last month:

Was it more, about, or less than...

Q291_Unf_Results := explode("", Q291_Unf)

ELSEIF Q290_ = 0 THEN
Q526_ (R INCOME FROM OTHER ANNUITY - LAST YEAR in section SectionQ)
Did you get any income from these annuities last year?

IF Q526_ = 1 THEN
| Q527_ (R AMOUNT FROM OTHER ANNUITY - LAST YEAR in section SectionQ)
| How much in total did you receive from these annuities last year before taxes and
| other deductions?
| RANGE 0..99999996
END OF IF
END OF IF

IF Q290_ > 0 OR Q290_ = EMPTY OR (Q290_ = 0 AND Q526_ = 1) THEN
| Q294_ (R TAX W/HELD OTR ANNUITIES in section SectionQ)
| Were any federal income taxes withheld on these annuities?
END OF IF
END OF IF
END OF IF

IF Q274_ IN (2,3) THEN
Q295_ (MORE THAN ONE ANNUITY SP in section SectionQ)
Now we want to ask you about the annuity payments received by your (hus-
band/wife/partner/spouse).

Does (he/she/your spouse/your partner) currently receive more than one such
annuity payment?

IF Q295_ = 1 THEN
| Q296_ (NUMBER OF ANNUITIES SP in section SectionQ)
| How many such annuity payments does your (^FLHWP) receive?
| RANGE 0..20
ELSE

```

```
| Q296_ := 1
```

```
END OF IF
```

```
IF Q296_ = 1 THEN
```

```
| ANNtotSP := 1
```

```
ELSE
```

```
| ANNtotSP := 2
```

```
END OF IF
```

```
IF Q296_ > 0 THEN
```

```
  LOOP FROM 1 TO ANNTOTSP
```

```
    Fill code of question FLQ298 executed
```

```
    IF ANNcnt = 1 THEN
```

```
      | Q298_maximum := 10000
```

```
    ELSE
```

```
      IF Q298_(1) = RESPONSE THEN
```

```
        | Q298_maximum := str_replace(",","",Q298_(1))
```

```
      ELSE
```

```
        | Q298_maximum := 10000
```

```
      END OF IF
```

```
    END OF IF
```

**Q298\_** (SSP AMOUNT FROM ANNUITY - LAST MONTH in section SectionQ)  
(Please think about the largest annuity payment that **your ^FLHWP** receives.

How much did ^FLQ131 receive last month from that annuity,/How much did ^**FLQ131** receive last month from the **second annuity payment**,/How much did ^**FLQ131** receive last month from the **second largest annuity payment**,/How much did ^**FLQ131** receive last month from that annuity payment,) before taxes and other deductions?

Please enter zero if annuity payments have not started yet or you did not receive a payment last month.

RANGE 250..(USED IN VALIDATION CHECK OF Q298())

IF Q298\_(ANNcnt) = EMPTY THEN

IF X507 = 1 THEN

Q299\_Unf.Random(ANNcnt) := 5

ELSE

Q299\_Unf.Random(ANNcnt) := 6

END OF IF

**Q299\_Unf** (Unfolding in section SectionQ)

Thinking about the income received from that annuity payment last month:

Was it more, about, or less than...

Q299\_Unf.Results(ANNcnt) := explode("'", Q299\_Unf(ANNcnt))

ELSEIF Q298\_(ANNcnt) = 0 THEN

**Q528\_** (SP INCOME FROM ANNUITY - LAST YEAR in section SectionQ)

Did (he/she/your spouse/your partner) get any income from this annuity last year?

IF Q528\_(ANNcnt) = 1 THEN

**Q529\_** (SP AMOUNT FROM ANNUITY - LAST YEAR in section SectionQ)

How much in total did (he/she/your spouse/your partner) receive from this annuity last year before taxes and other deductions?

RANGE 0..99999996

END OF IF

END OF IF

IF Q298\_(ANNcnt) > 0 OR Q298\_(ANNcnt) = EMPTY OR (Q298\_(ANNcnt) = 0 AND Q528\_(ANNcnt) = 1) THEN

**Q302\_** (SP TAXES WITHHELD FROM ANNUITY PMT in section SectionQ)

Were any federal income taxes withheld on that annuity?

**Q303\_** (SP YEAR ANNUITY PMT STARTED in section SectionQ)

In what year did (he/she/your spouse/your partner) start to receive that annuity

payment?

IF Q303\_(ANNcnt) > FLCurrentYear - 3 THEN

Q304\_ (SP MONTH ANNUITY PMT STARTED in section SectionQ)  
What month was that?

END OF IF

Q305\_ (SP ANNUITY PMT COLA ADJUSTMENT in section SectionQ)  
Is the annuity payment to your (^FLHWP) automatically adjusted for changes in the cost of living?

Q306\_ (SP ANNUITY PMT CONTINUE FOR LIFE in section SectionQ)  
Will this payment continue for as long as (he/she/your spouse/your partner) lives?

IF Q306\_(ANNcnt) = 5 THEN

Q307\_ (SP HOW LONG ANNUITY PMT CONTINUE in section SectionQ)  
For how many years will it continue?  
NUMBER (NO DECIMALS ALLOWED)

END OF IF

Fill code of question FLQ308 executed

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

Q308\_ (SP ANNUITY PMT CHANGE AT DEATH in section SectionQ)  
If (he/she/your spouse/your partner) were to die( before then,/,) would the payment from your (^FLHWP)'s annuity stop, continue unchanged, or continue at a reduced level?  
1 Stop  
2 Continue unchanged  
3 Continue at a reduced level  
7 Other, please specify:

Q309S (SP ANNUITY PMT CHANGE AT DEATH-SPECIFY in section SectionQ)  
STRING

END OF GROUP

END OF IF

END OF LOOP

END OF IF

IF Q296\_ > 2 THEN

**Q310\_** (SP OTHER ANNUITIES - AMOUNT RECD LAST MO in section SectionQ)

About the other annuity payments that (he/she/your spouse/your partner) receives, about how much in total did (he/she/your spouse/your partner) receive last month, before taxes and other deductions?

Please enter zero if annuity payments have not started yet or (he/she/your spouse/your partner) did not receive a payment last month.

RANGE 250..20000

IF Q310\_ = EMPTY THEN

IF Q498\_Unf\_Random = EMPTY THEN

Q498\_Unf\_Random := 11

END OF IF

**Q498\_Unf** (Unfolding in section SectionQ)

Thinking about the income received from those other annuity payments last month:

Was it more, about, or less than...

Q498\_Unf\_Results := explode('...', Q498\_Unf)

ELSEIF Q310\_ = 0 THEN

**Q530\_** (SP INCOME FROM OTHER ANNUITY - LAST YEAR in section SectionQ)

Did (he/she/your spouse/your partner) get any income from these annuities last year?

IF Q530\_ = 1 THEN

**Q531\_** (SP AMOUNT FROM OTHER ANNUITY - LAST YR in section SectionQ)

How much in total did (he/she/your spouse/your partner) receive from these annuities last year before taxes and other deductions?

RANGE 0..99999996

END OF IF

END OF IF

IF Q310\_ > 0 OR Q310\_ = EMPTY OR (Q310\_ = 0 AND Q530\_ = 1) THEN

**Q311\_** (SP TAXES WITHHELD FROM OTHER ANNUITY in section SectionQ)

Were any federal income taxes withheld on these annuities to your (^FLHWP)?

END OF IF

END OF IF

END OF IF

IF Q274\_ = EMPTY THEN

**Q312\_** (R-SP TOTAL MONTHLY ANNUITY INCOME in section SectionQ)

Overall, about how much income did you( and your ^FLHWP) receive last month from annuity payments, not including Social Security?

RANGE 0..99999996

END OF IF

END OF IF

Fill code of question FLQ316 executed

**Q316\_** (STOCK AND STOCK MUTUAL FUNDS in section SectionQ)

(The next questions are about your assets, including those held by you and your ^FLHWP jointly, by you only, or by your ^FLHWP only.

/)Do you( or your ^FLHWP/) have any shares of stock or stock mutual funds? Please **exclude** any shares of stock or stock mutual funds **that you have in employer pension plans or retirement accounts.**

IF Q316\_ = 1 THEN

q317\_compare := str\_replace(", ", "", q317\_compare)

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**Q317\_** (STOCKS TOTAL VALUE in section SectionQ)

If you( or your ^FLHWP/) sold all those stocks and stock mutual funds and paid off anything you owed on them, about how much would you have?

RANGE 1000..2000000

**q317\_diffwarning** (Section SectionQ)

According to our records, the amount you entered differs greatly from your last survey in (January/February/March/April/May/June/July/August/September/October/November/December), ((): \$(PRELOADED STOCKS TOTAL VALUE()). Please review your answer. If it is correct, select Next to continue. Otherwise please make the correction before continuing.

**q317\_flag** (FLAG COMPARE AMOUNT in section PreloadQ)

NUMBER (NO DECIMALS ALLOWED)

END OF GROUP

IF Q317\_ = EMPTY THEN



**IF X044 = 1 THEN**

| Q318\_Unf\_Random := 3

**ELSEIF X044 = 2 THEN**

| Q318\_Unf\_Random := 5

**ELSE**

| Q318\_Unf\_Random := 6

**END OF IF**

**Q318\_Unf** (Unfolding in section SectionQ)

Thinking about the value of those stocks or stock mutual funds:

Would it be more, about, or less than...

Q318\_Unf\_Results := explode("'", Q318\_Unf)

**END OF IF**

**Q321\_** (STOCK INCOME in section SectionQ)

Do these stocks or mutual funds pay any dividends or interest?

**IF Q321\_ = 1 THEN**

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**Q322\_** (STOCK INCOME HOW OFTEN in section SectionQ)

How often are these dividends and interest (from stocks and stock mutual funds) paid?

If you have multiple stocks or mutual funds or more than one payment frequency, please choose 'Other' and specify.

1 It accumulates or is reinvested

3 Monthly

4 Quarterly

5 Every 6 months

6 Yearly

7 Other, please specify:

**Q323S** (R/H/W/P ST/MUT FUND INC HOW OFT-SPECIFY in section SectionQ)

STRING

**END OF GROUP**

**IF Q322\_ IN (3,4,5) THEN**

**Q324\_** (STOCK INCOME AMOUNT LAST PERIOD in section SectionQ)

About how much did you( or your ^FLHWP/) receive in your last dividends or interest payment from these stocks and stock mutual funds, before taxes and other deductions?

```

RANGE 0..99999996

IF Q324_ != EMPTY THEN
  Q325_ (STOCK INCOME AMOUNT SAME PER PERIOD in section SectionQ)
  Do you( or your ^FLHWP/) get about the same amount of dividends and interest
  (from stocks and stock mutual funds) each payment?
END OF IF
END OF IF

IF Q322_ IN (1,6,7) OR Q322_ = EMPTY OR (Q322_ IN (3,4,5) AND Q324_ =
EMPTY) OR (Q322_ IN (3,4,5) AND Q324_ != EMPTY AND Q325_ != 1) THEN
  Q326_ (STOCK INCOME AMOUNT - LCY in section SectionQ)
  About how much dividends and interest did you( or your ^FLHWP/) receive from these
  stocks or stock mutual funds in (LAST CALENDAR YEAR()), before taxes and other
  deductions? Please do not include any stocks or mutual funds in a pension plan.
  RANGE 250..1000000

  IF Q326_ = EMPTY THEN
    IF X518 = 1 THEN
      Q327_Unf_Random := 11
    ELSEIF X518 = 2 THEN
      Q327_Unf_Random := 10
    ELSE
      Q327_Unf_Random := 12
    END OF IF

    Q327_Unf (Unfolding in section SectionQ)
    Thinking about what was received from stocks or stock mutual funds in (LAST
    CALENDAR YEAR()):

    Was it more, about, or less than...

    Q327_Unf_Results := explode("'", Q327_Unf)
  END OF IF
END OF IF
END OF IF
END OF IF

```

**Q330\_** (BOND ASSETS in section SectionQ)  
 Do you( or your ^FLHWP/) have any corporate, municipal, government or foreign bonds, or  
 bond funds? Do not count government savings bonds or Treasury bills.

Please **exclude** any corporate, municipal, government or foreign bonds, or bond funds

that you have in employer pension plans or retirement accounts.

**IF Q330\_ = 1 THEN**

q331\_compare := str\_replace(", ", "", q331\_compare)

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**Q331\_** (BOND ASSETS TOTAL VALUE in section SectionQ)

If you( or your ^FLHWP/) sold all those bonds or bond funds, and paid off anything you owed on them, about how much would you have?

RANGE 1000..1500000

**q331\_diffwarning** (Section SectionQ)

According to our records, the amount you entered differs greatly from your last survey in (January/February/March/April/May/June/July/August/September/October/November/December), (()): \$(PRELOADED BOND ASSETS TOTAL VALUE()). Please review your answer. If it is correct, select Next to continue. Otherwise please make the correction before continuing.

**q331\_flag** (FLAG COMPARE AMOUNT in section PreloadQ)

NUMBER (NO DECIMALS ALLOWED)

**END OF GROUP**

**IF Q331\_ = EMPTY THEN**

**IF X045 = 1 THEN**

| Q332\_Unf\_Random := 3

**ELSEIF X045 = 2 THEN**

| Q332\_Unf\_Random := 5

**ELSE**

| Q332\_Unf\_Random := 6

**END OF IF**

**Q332\_Unf** (Unfolding in section SectionQ)

Thinking about the value of those bonds or bond funds:

Would it be more, about, or less than...

Q332\_Unf\_Results := explode("'", Q332\_Unf)

**END OF IF**

**Q335\_** (BOND ASSET INTEREST INCOME in section SectionQ)

Do these bonds or bond funds pay any dividends or interest?

**IF Q335\_ = 1 THEN**

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**Q336\_** (BOND INCOME HOW OFTEN in section SectionQ)

How often are these dividends and interest (from bonds and bond funds) paid?

1 It accumulates or is reinvested

3 Monthly

4 Quarterly

5 Every 6 months

6 Yearly

7 Other, please specify:

**Q337S** (BOND INT INCOME HOW OFT PAID - SPECIFY in section SectionQ)

STRING

**END OF GROUP**

**IF Q336\_ IN (3,4,5) THEN**

**Q338\_** (BOND INCOME AMOUNT LAST PERIOD in section SectionQ)

About how much did you( or your ^FLHWP/) receive in your last dividends or interest payment from these bond or bond funds, before taxes and other deductions?

RANGE 0..99999996

**IF Q338\_ != EMPTY THEN**

**Q339\_** (BOND INCOME AMOUNT SAME PER PERIOD in section SectionQ)

Do you( or your ^FLHWP/) get about the same amount of dividends and interest (from bonds and bond funds) each payment?

**END OF IF**

**END OF IF**

**IF Q336\_ IN (1,6,7) OR Q336\_ = EMPTY OR (Q336\_ IN (3,4,5) AND Q338\_ = EMPTY) OR (Q336\_ IN (3,4,5) AND Q338\_ != EMPTY AND Q339\_ != 1) THEN**

**Q340\_** (BOND INCOME AMOUNT - LCY in section SectionQ)

About how much dividends and interest did you( or your ^FLHWP/) receive from these bonds or bond funds in (LAST CALENDAR YEAR()), before taxes and other deductions?

RANGE 250..1000000

**IF Q340\_ = EMPTY THEN**

**IF X519 = 1 THEN**

Q341\_Unf\_Random := 11

**ELSEIF X519 = 2 THEN**

```

| Q341_Unf.Random := 10
| ELSE
| Q341_Unf.Random := 12
| END OF IF

Q341_Unf (Unfolding in section SectionQ)
Thinking about what was received from these bonds or bond funds in (LAST
CALENDAR YEAR()):

Was it more, about, or less than...

Q341_Unf.Results := explode("'", Q341_Unf)
END OF IF
END OF IF
END OF IF
END OF IF

```

**Q344a** (CHECKING SAVINGS in section SectionQ)  
Do you( or your ^FLHWP/) have any **checking** or **savings** accounts?

**Q344b** (MONEY MARKET FUNDS in section SectionQ)  
Do you( or your ^FLHWP/) have any have any **money market funds**?

IF Q344a = 1 OR Q344b = 1 THEN

```
| Q344_ := 1
```

END OF IF

IF Q344\_ = 1 THEN

```
q345_compare := str_replace(" ", "", q345_compare)
```

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**Q345\_** (CHECKING TOTAL VALUE in section SectionQ)

If you added up all such checking accounts, savings accounts, and money market funds about how much would they amount to right now?

RANGE 0..300000

**q345\_diffwarning** (Section SectionQ)

According to our records, the amount you entered differs greatly from your last survey in (January/February/March/April/May/June/July/August/September/October/November/December),  
(()): \$(PRELOADED CHECKING TOTAL VALUE()). Please review your answer. If it is correct, select Next to continue. Otherwise please make the correction before

continuing.

**q345\_flag** (FLAG COMPARE AMOUNT in section PreloadQ)  
NUMBER (NO DECIMALS ALLOWED)

#### END OF GROUP

**IF Q345\_ = EMPTY THEN**

**IF X046 = 1 THEN**

| Q346\_Unf\_Random := 3

**ELSEIF X046 = 2 THEN**

| Q346\_Unf\_Random := 5

**ELSE**

| Q346\_Unf\_Random := 6

**END OF IF**

**Q346\_Unf** (Unfolding in section SectionQ)

Thinking about those accounts:

Would it be more, about, or less than...

Q346\_Unf\_Results := explode("", Q346\_Unf)

**END OF IF**

**Q349\_** (CHECKING INTEREST INCOME in section SectionQ)

Do these accounts or money market fund pay any dividends or interest?

**IF Q349\_ = 1 THEN**

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**Q350\_** (CHECKING INCOME HOW OFTEN in section SectionQ)

How often are these dividends and interest (from checking accounts, savings accounts, and money market funds) paid?

1 It accumulates or is reinvested

3 Monthly

4 Quarterly

5 Every 6 months

6 Yearly

7 Other, please specify:

**Q351S** (HOW OFTEN DIVID OR INTR-SPECIFY in section SectionQ)

STRING

END OF GROUP

IF Q350\_ IN (3,4,5) THEN

**Q352\_** (CHECKING INCOME LAST PERIOD in section SectionQ)

About how much did you( or your ^FLHWP/) receive in your last dividends and interest payment from these checking or saving accounts or money market funds, before taxes and other deductions?

RANGE 0..99999996

IF Q352\_ != EMPTY THEN

**Q353\_** (CHECKING INCOME PER PERIOD in section SectionQ)

Do you( or your ^FLHWP/) get about the same amount of dividends and interest (from checking accounts, savings accounts, and money market funds) each payment?

END OF IF

END OF IF

IF Q350\_ IN (1,6,7) OR Q350\_ = EMPTY OR (Q350\_ IN (3,4,5) AND Q352\_ = EMPTY) OR (Q350\_ IN (3,4,5) AND Q352\_ != EMPTY AND Q353\_ != 1) THEN

**Q354\_** (CHECKING INCOME AMOUNT - LCY in section SectionQ)

About how much dividends and interest did you( or your ^FLHWP/) receive from these checking or saving accounts or money market funds in (LAST CALENDAR YEAR()), before taxes and other deductions?

Please enter zero if you did not receive anything from these checking or savings accounts. If the amount is less than \$1, please enter '1'.

RANGE 250..1000000

IF Q354\_ = EMPTY THEN

IF X520 = 1 THEN

Q494\_Unf\_Random := 11

ELSEIF X520 = 2 THEN

Q494\_Unf\_Random := 10

ELSE

Q494\_Unf\_Random := 12

END OF IF

**Q494\_Unf** (Unfolding in section SectionQ)

Thinking about the dividends and interest from checking accounts, savings accounts, and money market funds received in (LAST CALENDAR YEAR()):

Was it more, about, or less than...

```

| | Q494_Unf_Results := explode("'", Q494_Unf)
| | END OF IF
| | END OF IF
| | END OF IF
| | END OF IF

```

**Q356\_** (CDS GOVT SAVINGS TBILLS in section SectionQ)

Do you( or your ^FLHWP/) have any money in CDs, Government Savings Bonds, or Treasury Bills?

Please **exclude** any CDs, Government Savings Bonds, or Treasury Bills **that you have in employer pension plans or retirement accounts.**

**IF Q356\_ = 1 THEN**

```
q357_compare := str_replace(", ", "", q357_compare)
```

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**Q357\_** (CDS GOVT SAVINGS TBILLS TOTAL VALUE in section SectionQ)

If you added up all such CDs, Government Savings Bonds, and Treasury Bills, about how much would they amount to right now?

RANGE 1000..1500000

**q357\_diffwarning** (Section SectionQ)

According to our records, the amount you entered differs greatly from your last survey in (January/February/March/April/May/June/July/August/September/October/November/December), ((): \$(PRELOADED CDS GOVT SAVINGS TBILLS TOTAL VALUE()). Please review your answer. If it is correct, select Next to continue. Otherwise please make the correction before continuing.

**q357\_flag** (FLAG COMPARE AMOUNT in section PreloadQ)

NUMBER (NO DECIMALS ALLOWED)

#### END OF GROUP

**IF Q357\_ = EMPTY THEN**

**IF X048 = 1 THEN**

```
Q358_Unf_Random := 3
```

**ELSEIF X048 = 2 THEN**

```
Q358_Unf_Random := 5
```

**ELSE**

```
Q358_Unf_Random := 6
```



**END OF IF**

**Q358\_Unf** (Unfolding in section SectionQ)

Thinking about those CD, government savings bond, and Treasury Bill accounts:

Would it be more, about, or less than...

Q358\_Unf\_Results := explode("'", Q358\_Unf)

**END OF IF**

**Q361\_** (CDS INTEREST INCOME in section SectionQ)

Do these CDs, government bonds, or treasury bills pay any dividends or interest?

**IF Q361\_ = 1 THEN**

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**Q362\_** (CDS INCOME HOW OFTEN in section SectionQ)

How often are dividends and interest (from CDs, Government Savings Bonds, and Treasury Bills) paid?

- 1 It accumulates or is reinvested
- 3 Monthly
- 4 Quarterly
- 5 Every 6 months
- 6 Yearly
- 7 Other, please specify:

**Q363S** (HOW OFTEN GOV/SAV PAY - SPECIFY in section SectionQ)

STRING

**END OF GROUP**

**IF Q362\_ IN (3,4,5) THEN**

**Q364\_** (CDS INCOME LAST PERIOD in section SectionQ)

About how much did you( or your ^FLHWP/) receive in your last dividends and interest payment from these CDs, government bonds, or treasury bills, before taxes and other deductions?

RANGE 0..99999996

**IF Q364\_ = RESPONSE THEN**

**Q365\_** (CDS INCOME SAME PER PERIOD in section SectionQ)

Do you( or your ^FLHWP/) get about the same amount of dividends and interest (from CDs, Government Savings Bonds, and Treasury Bills) each payment?

**END OF IF**

```

END OF IF

IF Q362_ IN (1,6,7) OR Q362_ = EMPTY OR (Q362_ IN (3,4,5) AND Q364_ =
EMPTY) OR (Q362_ IN (3,4,5) AND Q364_ != EMPTY AND Q365_ != 1) THEN
  Q366_ (CDS INCOME AMOUNT - LCY in section SectionQ)
  About how much dividends and interest did you( or your ^FLHWP/) receive from these
  CD's, government bonds, or treasury bills in (LAST CALENDAR YEAR()), before
  taxes and other deductions?
  RANGE 250..1000000

  IF Q366_ = EMPTY THEN
    IF X511 = 1 THEN
      Q367_Unf_Random := 11
    ELSEIF X511 = 2 THEN
      Q367_Unf_Random := 10
    ELSE
      Q367_Unf_Random := 12
    END OF IF

    Q367_Unf (Unfolding in section SectionQ)
    Thinking about any income received from CD's, government bonds or treasury bills
    in (LAST CALENDAR YEAR()):

    Was it more, about, or less than...

    Q367_Unf_Results := explode("'", Q367_Unf)
  END OF IF
END OF IF
END OF IF
END OF IF

```

**Q370\_** (R-SP OWN TRANSPORTATION in section SectionQ)  
 Do you( or your ^FLHWP/) own anything for transportation, like cars, trucks, a trailer, a mo-  
 tor home, a boat, or an airplane?

Please do not include leased vehicles.

```

IF Q370_ = 1 THEN
  q371_compare := str_replace(", ", "", q371_compare)

```

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**Q371\_** (TRANSPORTATION TOTAL VALUE in section SectionQ)

What are these transportation vehicles worth altogether, minus anything you still owe on them?

RANGE 0..100000

**q371\_diffwarning** (Section SectionQ)

According to our records, the amount you entered differs greatly from your last survey in (January/February/March/April/May/June/July/August/September/October/November/December), (()): \$(PRELOADED TRANSPORTATION TOTAL VALUE()). Please review your answer. If it is correct, select Next to continue. Otherwise please make the correction before continuing.

**q371\_flag** (FLAG COMPARE AMOUNT in section PreloadQ)

NUMBER (NO DECIMALS ALLOWED)

END OF GROUP

IF Q371\_ = EMPTY THEN

IF X050 = 1 THEN

| Q372\_Unf\_Random := 10

ELSEIF X050 = 2 THEN

| Q372\_Unf\_Random := 11

ELSE

| Q372\_Unf\_Random := 12

END OF IF

**Q372\_Unf** (Unfolding in section SectionQ)

Thinking about the value of those vehicles:

Is it more, about, or less than...

Q372\_Unf\_Results := explode("", Q372\_Unf)

END OF IF

END OF IF

**Q375\_** (OTHER ASSETS in section SectionQ)

Do you( or your ^FLHWP/) have any other savings or assets, such as jewelry, money owed to you by others, a collection for investment purposes, rights in a trust or estate where you are the beneficiary, or an annuity that you haven't already mentioned?

Please exclude the cash value of any life insurance policies.

IF Q375\_ = 1 THEN

**Q376\_** (OTHER ASSETS TOTAL VALUE in section SectionQ)

If you( or your ^FLHWP/) sold all these other savings and assets and then paid off any debts on it, about how much would you have?

RANGE 2000..700000

**IF Q376\_ = EMPTY THEN**

**IF X052 = 1 THEN**

| Q377\_Unf\_Random := 10

**ELSEIF X052 = 2 THEN**

| Q377\_Unf\_Random := 11

**ELSE**

| Q377\_Unf\_Random := 12

**END OF IF**

**Q377\_Unf** (Unfolding in section SectionQ)

Thinking about the value of those assets:

Would it be more, about, or less than...

Q377\_Unf\_Results := explode("'", Q377\_Unf)

**END OF IF**

**Q380\_** (OTHER ASSET INCOME in section SectionQ)

Do any of these other savings or assets pay income?

**IF Q380\_ = 1 THEN**

**Q381\_** (OTHER ASSET INCOME AMOUNT LCY in section SectionQ)

About how much income did you( or your ^FLHWP/) receive from these other savings and assets in (LAST CALENDAR YEAR()), before taxes and other deductions?

RANGE 0..1000000

**IF Q381\_ = EMPTY THEN**

**IF X512 = 1 THEN**

| Q382\_Unf\_Random := 11

**ELSEIF X512 = 2 THEN**

| Q382\_Unf\_Random := 10

**ELSE**

| Q382\_Unf\_Random := 12

**END OF IF**

**Q382\_Unf** (Unfolding in section SectionQ)

Thinking about the income recieved from those other assets in (LAST CALENDAR

```

YEAR():
Was it more, about, or less than...
Q382_Unf_Results := explode("'", Q382_Unf)
END OF IF
END OF IF
END OF IF

```

**Q395\_** (OTHER SOURCES OF INCOME in section SectionQ)  
Other than income you have already mentioned, did you( or your ^FLHWP/) receive any other income in (LAST CALENDAR YEAR()), for example, from private disability insurance payments, consulting fees, rent from your home or second home, odd jobs, and so forth?

Please do not include financial support from relatives or friends.

**IF Q395\_ = 1 THEN**

**Q396\_** (OTHER SOURCES OF INCOME AMOUNT - LCY in section SectionQ)  
How much did you( and your ^FLHWP) receive altogether from these other sources in (LAST CALENDAR YEAR()), before taxes and other deductions?  
RANGE 1000..100000

**IF Q396\_ = EMPTY THEN**

**IF X508 = 1 THEN**

Q397\_Unf\_Random := 5

**ELSE**

Q397\_Unf\_Random := 6

**END OF IF**

**Q397\_Unf** (Unfolding in section SectionQ)

Thinking about the income received from those other sources in (LAST CALENDAR YEAR()):

Was it more, about, or less than...

Q397\_Unf\_Results := explode("'", Q397\_Unf)

**END OF IF**

**END OF IF**

**Q400\_** (HH FOOD STAMPS SINCE LAST IW in section SectionQ)

Did you or other family members who may have been living there receive government food stamps, also known as SNAP benefits, at any time (in the last two years/since ^z092, ^z093)?

Please include immediate family members who live with you.

IF Q400\_ = 1 THEN

IF Z076 != YES THEN

LOOP FROM (FLCURRENTYEAR-3) TO FLCURRENTYEAR

QW777startyr2 := (FLCurrentYear + FLCurrentYear - 3) - QW777startyr

**QW777\_** (ANY MONTHS RECEIVED FOOD STAMPS in section SectionQ)

Were there any months in (STARTING YEAR FOR QW777 LOOP- -DECREASING YEARS()) when you, or other family members who may have been living there, were receiving government food stamps or SNAP benefits?

IF QW777\_(QW777startyr2) = 1 THEN

IF QW777startyr2 = FLCurrentYear THEN

Fill code of question FLQW778 executed

**QW778\_** (MONTHS COLLECTED FOOD STAMPS in section SectionQ)

Which months in (STARTING YEAR FOR QW777 LOOP- -DECREASING YEARS()) were those when you, or other family members who may have been living there, were receiving government food stamps or SNAP benefits?

Please choose all that apply.

- 1 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 2 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 3 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 4 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 5 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 6 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 7 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 8 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 9 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 10 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)

12 months)  
 11 (January/February/March/April/May/June/July/August/September/October/November/December/All  
 12 months)  
 12 (January/February/March/April/May/June/July/August/September/October/November/December/All  
 12 months)  
 13 All months listed  
 14 None of the months listed

ELSE

**QW778\_dummy** (MONTHS COLLECTED FOOD STAMPS in section SectionQ)  
 Which months in (STARTING YEAR FOR QW777 LOOP- -DECREASING  
 YEARS()) were those when you or other family members who may have been  
 living there were receiving government food stamps or SNAP benefits?

Please choose all that apply.

1 January  
 2 February  
 3 March  
 4 April  
 5 May  
 6 June  
 7 July  
 8 August  
 9 September  
 10 October  
 11 November  
 12 December  
 13 All months  
 14 No months

QW778\_(QW777startyr2) := QW778\_dummy(QW777startyr2)

END OF IF

END OF IF

END OF LOOP

ELSE

LOOP FROM Z093 TO FLCURRENTYEAR

QW777startyr2 := (FLCurrentYear + Z093) - QW777startyr

**QW777\_** (ANY MONTHS RECEIVED FOOD STAMPS in section SectionQ)  
 Were there any months in (STARTING YEAR FOR QW777 LOOP- -DECREASING

YEARS()) when you, or other family members who may have been living there, were receiving government food stamps or SNAP benefits?

IF QW777\_(QW777startyr2) = 1 THEN

IF QW777startyr2 = FLCurrentYear THEN

Fill code of question FLQW778 executed

**QW778\_** (MONTHS COLLECTED FOOD STAMPS in section SectionQ)

Which months in (STARTING YEAR FOR QW777 LOOP- -DECREASING YEARS()) were those when you, or other family members who may have been living there, were receiving government food stamps or SNAP benefits?

Please choose all that apply.

- 1 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 2 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 3 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 4 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 5 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 6 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 7 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 8 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 9 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 10 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 11 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 12 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 13 All months listed
- 14 None of the months listed

ELSEIF QW777startyr2 = Z093 THEN



Fill code of question FLQW778\_min executed

**QW778\_min** (MONTHS COLLECTED FOOD STAMPS in section SectionQ)

Which months in (STARTING YEAR FOR QW777 LOOP- -DECREASING YEARS()) were those when you or other family members who may have been living there were receiving government food stamps or SNAP benefits?

Please choose all that apply.

- 1 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 2 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 3 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 4 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 5 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 6 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 7 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 8 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 9 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 10 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 11 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 12 (January/February/March/April/May/June/July/August/September/October/November/December/All 12 months)
- 13 All months listed
- 14 None of the months listed

QW778\_(QW777startyr2) := QW778\_min(QW777startyr2)

**ELSE**

**QW778\_dummy** (MONTHS COLLECTED FOOD STAMPS in section SectionQ)

Which months in (STARTING YEAR FOR QW777 LOOP- -DECREASING YEARS()) were those when you or other family members who may have been living there were receiving government food stamps or SNAP benefits?

Please choose all that apply.

```
1 January
2 February
3 March
4 April
5 May
6 June
7 July
8 August
9 September
10 October
11 November
12 December
13 All months
14 No months
```

```
QW778_(QW777startyr2) := QW778_dummy(QW777startyr2)
```

```
END OF IF
```

```
END OF IF
```

```
END OF LOOP
```

```
END OF IF
```

**Q532\_** (HH STILL RECEIVING FOOD STAMPS in section SectionQ)

Are you, or other family members who are living there, still receiving food stamps or SNAP benefits?

```
IF Q532_ = 5 THEN
```

**Q406\_** (AMOUNT FOOD STAMPS LAST MONTH RECD in section SectionQ)

How many dollars worth of food stamps or SNAP benefits did you and other family members who may have been living there get the last month you received food stamps or SNAP benefits?

RANGE 0..99999996

```
IF Q406_ = EMPTY THEN
```

```
IF X509 = 1 THEN
```

```
Q407_Unf_Random := 5
```

```
ELSE
```

```
Q407_Unf_Random := 6
```

```
END OF IF
```

**Q407\_Unf** (Unfolding in section SectionQ)

Thinking about the value of the food stamps or SNAP benefits in the last month that

```

| you received them:
|
| Was it more, about, or less than...
|
| Q407_Unf_Results := explode("'", Q407_Unf)
| END OF IF
ELSEIF Q532_ = 1 THEN
  Q410_ (AMOUNT FOOD STAMPS CURR RECD-LAST MONTH in section SectionQ)
  How many dollars worth of food stamps or SNAP benefits did you and other family
  members who may have been living there get the last month?
  RANGE 50..500

  IF Q410_ = EMPTY THEN
    IF X510 = 1 THEN
      Q411_Unf_Random := 5
    ELSE
      Q411_Unf_Random := 6
    END OF IF

    Q411_Unf (Unfolding in section SectionQ)
    Thinking about the value of the food stamps or SNAP benefits you received last month:

    Was it more, about, or less than...

    Q411_Unf_Results := explode("'", Q411_Unf)
  END OF IF
END OF IF
END OF IF

IF A167_A028 = 1 AND not(X065ACouplenss(1) IN (1,2,3,4)) THEN
|
ELSEIF A167_A028 = 1 AND (A030 = YES OR A209_LivTogethr = YES OR A033_SplnNHome
= 1) THEN
|
ELSE
  Q414_ (R SUBSIDIZED FOOD AT HOME SINCE LAST IW in section SectionQ)
  Did you or other family members who may have been living there have any free or sub-
  sidized meals (such as 'Meals on Wheels') delivered to you at home at any time (in the
  last two years/since ^z092, ^z093)?
END OF IF

Q415_ (R ENOUGH FOOD SINCE LAST IW in section SectionQ)
(In the last two years/Since ^z092, ^z093), have you always had enough money to buy the

```

food you need?

**IF Q415\_ != 1 THEN**

**Q516\_Q416** (EAT LESS BC NOT ENOUGH MONEY in section SectionQ)

In the last 12 months, did you ever eat less than you felt you should because there wasn't enough money to buy food?

**END OF IF**

**IF A167\_A028 != 1 THEN**

Fill code of question FLQ417 executed

**Q417\_** (R-HHMEM SPEND ON FOOD AVG WK-AMOUNT in section SectionQ)

(In addition to any food bought with food stamps or SNAP benefits, about/About) how much do you, and other family members who may be living there, spend on food that you use at home in an average week?

RANGE 0..99999996

**IF Q417\_ = EMPTY THEN**

**IF X513 = 1 THEN**

Q418\_Unf\_Random := 5

**ELSEIF X513 = 2 THEN**

Q418\_Unf\_Random := 6

**ELSE**

Q418\_Unf\_Random := 3

**END OF IF**

**Q418\_Unf** (Unfolding in section SectionQ)

Thinking about what you spend on food for use at home in an average week:

Is it more, about, or less than...

Q418\_Unf\_Results := explode("'", Q418\_Unf)

**END OF IF**

**Q421\_** (R-HHMEM GET FOOD DELIVERED TO DOOR in section SectionQ)

Do you, or other family members who may be living there, have any food delivered to the door which isn't included in that amount?

**IF Q421\_ = 1 THEN**

**Q422\_** (R AMT SPENT ON FOOD DELIVERED AVG WK in section SectionQ)

About how much do you, or other members who may be living there, spend in an average week on that food?

RANGE 0..99999996

```

IF Q422_ = EMPTY THEN
  IF Q423_Unf_Random = EMPTY THEN
    Q423_Unf_Random := 11
  END OF IF
END OF IF

```

**Q423\_Unf** (Unfolding in section SectionQ)

Thinking about any money you spend on food delivery in an average week:

Is it more, about, or less than...

Q423\_Unf\_Results := explode("'", Q423\_Unf)

```

END OF IF
END OF IF

```

**Q426\_** (R SPENT ON EATING OUT IN TYPICAL WEEK in section SectionQ)

About how much do you, and other members who may be living there, spend eating out in a typical week, not counting meals at work or at school?

Please enter zero if you do not eat out.

RANGE 0..99999996

```

IF Q426_ = EMPTY THEN
  IF X514 = 1 THEN
    Q427_Unf_Random := 5
  ELSEIF X514 = 2 THEN
    Q427_Unf_Random := 6
  ELSE
    Q427_Unf_Random := 3
  END OF IF
END OF IF

```

**Q427\_Unf** (Unfolding in section SectionQ)

Thinking about any money you spend on eating out:

Is it more, about, or less than...

Q427\_Unf\_Results := explode("'", Q427\_Unf)

```

END OF IF
END OF IF

```

LOOP FROM 3 TO PERSONCOUNTER

,

IF X061ARelateR(Qcnt) IN (3,4,5,6,7,8,90,91) AND X056AResStat(Qcnt) IN (1,2,3) AND X067AYrBorn(Qcnt) = RESPONSE AND (FLCurrentYear - X067AYrBorn(Qcnt) > 15) THEN

**Q432\_** (IF HHMEM WORKED IN LCY in section SectionQ)  
During (LAST CALENDAR YEAR()), did (**FIRST NAME OF HH MEMBERS/CHILDREN(Qcnt)**) ((**RELATIONSHIP TO R(Qcnt)**)) do any work for pay?

IF Q432\_(Qcnt) = 1 THEN

Fill code of question FLQ433 executed

**Q433\_** (HHMEM EARNED AMOUNT - LCY in section SectionQ)  
About how much money did (he/she/he/she) earn from all jobs in (LAST CALENDAR YEAR()), before taxes and other deductions?

Please do not include job income from yourself( or your ^FLHWP/).  
RANGE 0..99999996

IF Q433\_(Qcnt) = EMPTY THEN

IF X501 = 1 THEN

Q434\_Unf\_Random(Qcnt) := 5

ELSE

Q434\_Unf\_Random(Qcnt) := 6

END OF IF

**Q434\_Unf** (Unfolding in section SectionQ)  
Thinking about the money (he/she/your spouse/your partner) earned from all jobs in (LAST CALENDAR YEAR()):

Was it more, about, or less than...

Q434\_Unf\_Results(Qcnt) := explode('...', Q434\_Unf(Qcnt))

END OF IF

END OF IF

END OF IF

END OF LOOP

LOOP FROM 53 TO PERSONCOUNTER1

IF HHmemArray(1) = EMPTY AND X056AResStat(Qcnt) IN (1,2,3) THEN

    | HHmemArray(1) := X060ASex(Qcnt)

END OF IF

IF not(X061ARelateR(Qcnt) IN (1,2,3,4,5,6,7,8,90,91)) AND X056AResStat(Qcnt) IN (1,2,3) AND X067AYrBorn(Qcnt) = RESPONSE AND (FLCurrentYear - X067AYrBorn(Qcnt) > 15) THEN

**Q432\_** (IF HHMEM WORKED IN LCY in section SectionQ)  
During (LAST CALENDAR YEAR()), did **(FIRST NAME OF HH MEMBERS/CHILDREN(Qcnt)) ((RELATIONSHIP TO R(Qcnt)))** do any work for pay?

IF Q432\_(Qcnt) = 1 THEN

    | Fill code of question FLQ433 executed

**Q433\_** (HHMEM EARNED AMOUNT - LCY in section SectionQ)  
About how much money did (he/she/he/she) earn from all jobs in (LAST CALENDAR YEAR()), before taxes and other deductions?

Please do not include job income from yourself( or your ^FLHWP/).  
RANGE 0..99999996

IF Q433\_(Qcnt) = EMPTY THEN

    | IF X501 = 1 THEN

        | Q434\_Unf\_Random(Qcnt) := 5

    ELSE

        | Q434\_Unf\_Random(Qcnt) := 6

END OF IF

**Q434\_Unf** (Unfolding in section SectionQ)  
Thinking about the money (he/she/your spouse/your partner) earned from all jobs in (LAST CALENDAR YEAR()):

```

| Was it more, about, or less than...
|
| Q434_Unf_Results(Qcnt) := explode("'", Q434_Unf(Qcnt))
|
| END OF IF
|
| END OF IF
|
| END OF IF

```

END OF LOOP

IF A098.NumHHM > 0 THEN

**Q437\_** (HHMEM NON JOB INCOME RECD AMOUNT in section SectionQ)  
 Not including job income, about how much in total did other members of your family living in your household receive in (LAST CALENDAR YEAR()) from Social Security, pensions, welfare, interest, gifts, or anything else, before taxes and other deductions?

Please enter zero if none.  
 RANGE 0..99999996

IF Q437\_ = EMPTY THEN

IF X515 = 1 THEN

Q438\_Unf\_Random := 5

ELSEIF X515 = 2 THEN

Q438\_Unf\_Random := 3

ELSE

Q438\_Unf\_Random := 6

END OF IF

**Q438\_Unf** (Unfolding in section SectionQ)

Thinking about the other members of your family living there, and any other money they received in (LAST CALENDAR YEAR()):

Was it more, about, or less than...

Q438\_Unf\_Results := explode("'", Q438\_Unf)

END OF IF

**Q441\_** (HHMEM ASSETS in section SectionQ)

Do other members of your family living in your household have more than \$5,000 total in bank accounts, other financial assets, vehicles, property, or other investments?



Please do not include assets of yourself( or your ^FLHWP/).

**IF Q441\_ = 1 THEN**

Fill code of question FLQ442 executed

**Q442\_** (HHMEM ASSET AMOUNT in section SectionQ)

About how much altogether would these other family members' assets amount to, minus any debts they might have?

Please enter zero if none.

RANGE 5000..99999996

**IF Q442\_ = EMPTY THEN**

**IF X502 = 1 THEN**

Q443\_Unf\_Random := 10

**ELSE**

Q443\_Unf\_Random := 11

**END OF IF**

**Q443\_Unf** (Unfolding in section SectionQ)

Thinking about the value of these assets:

Would it be more, about, or less than...

Q443\_Unf\_Results := explode("'", Q443\_Unf)

**END OF IF**

**END OF IF**

**END OF IF**

**Q446\_** (R OR SP FILE INCOME TAX RETURN - LCY in section SectionQ)

Did you( or your ^FLHWP/) file a federal income tax return form for (LAST CALENDAR YEAR())?

**IF Q446\_ = 1 THEN**

**Q447\_** (R OR SP ITEMIZED DEDUCTIONS in section SectionQ)

Did you( and your ^FLHWP) itemize deductions on your (LAST CALENDAR YEAR()) federal income tax, such as property taxes, interest payments, medical expenses, and charitable contributions?

**END OF IF**

**Q453\_** (WHETHER DONATE CHARITY in section SectionQ)

In (LAST CALENDAR YEAR()), did you( or your ^FLHWP/) donate money, property, or possessions totaling \$500 or more to religious or other charitable organizations?

(DEF: By "charitable organizations" we include groups such as The United Way, the American Heart Association, educational institutions, religious organizations or other such institutions.)

**IF Q453\_ = 1 THEN**

**Q454\_** (AMOUNT DONATE TO CHARITY in section SectionQ)

About how much money did these charitable donations amount to?

RANGE 0..99999996

**IF Q454\_ = EMPTY THEN**

**IF X504 = 1 THEN**

Q455\_Unf\_Random := 5

**ELSE**

Q455\_Unf\_Random := 6

**END OF IF**

**Q455\_Unf** (Unfolding in section SectionQ)

Thinking about your donations in (LAST CALENDAR YEAR()):

Was it more, about, or less than...

Q455\_Unf\_Results := explode("'", Q455\_Unf)

**END OF IF**

**END OF IF**

**Q464\_** (PUT ANY ASSETS IN TRUST in section SectionQ)

Have you( and your ^FLHWP) put any of your assets into a trust?

**IF Q464\_ = 1 THEN**

**Q465\_** (RCV TRUST BENEFITS in section SectionQ)

Do you( or your ^FLHWP/) receive any income from your trust(s)?

q467\_compare := str\_replace(", ", "", q467\_compare)

**GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN**

**Q467\_** (VALUE OF ANY TRUSTS in section SectionQ)

What about the value of any trusts?

If you( or your ^FLHWP/) could sell all the assets you have put in trusts, about how much would you have?

RANGE 0..100000

**q467\_diffwarning** (Section SectionQ)

According to our records, the amount you entered differs greatly from your last survey in (January/February/March/April/May/June/July/August/September/October/November/December), (()): \$(PRELOADED VALUE OF ANY TRUSTS()). Please review your answer. If it is correct, select Next to continue. Otherwise please make the correction before continuing.

**q467\_flag** (FLAG COMPARE AMOUNT in section PreloadQ)  
NUMBER (NO DECIMALS ALLOWED)

**END OF GROUP**

**IF Q467\_ = EMPTY THEN**

**IF X505 = 1 THEN**

Q468\_Unf\_Random := 11

**ELSE**

Q468\_Unf\_Random := 10

**END OF IF**

**Q468\_Unf** (Unfolding in section SectionQ)

Thinking about the value of any assets put into trusts:

Would it be more, about, or less than...

Q468\_Unf\_Results := explode('!', Q468\_Unf)

**END OF IF**

**Q471\_** (ALL OTHER ASSETS IN TRUSTS PREV REPORTED in section SectionQ)

Have you already mentioned all of the investments and other assets that are included in the trust?

**IF Q471\_ = 5 THEN**

**Q472\_** (VALUE ASSETS NOT PREV REPORTED in section SectionQ)

What is the value of the assets in the trust that you did **NOT** include earlier?

RANGE 0..1000000

**IF Q472\_ = EMPTY THEN**

**IF Q473\_Unf\_Random = EMPTY THEN**

Q473\_Unf\_Random := 11

**END OF IF**

**Q473\_Unf** (Unfolding in section SectionQ)

```

| Thinking about those other assets in the trust:
|
| Is it more, about, or less than...
|
| Q473_Unf_Results := explode("'", Q473_Unf)
| END OF IF
| END OF IF

Q476_ (CHANGE TERMS OF TRUST in section SectionQ)
If you wanted to, could you change the terms of the trust?

END OF IF

Q477_ (R OR SP ANY DEBTS NOT ASKED ABOUT BEFORE in section SectionQ)
And do you( or your ^FLHWP/) have any debts that we haven't asked about, such as credit
card balances, medical debts, life insurance policy loans, loans from relatives, and so forth?

Please do not include mortgages, loans for cars or other vehicles, or money owed on
other assets.

IF Q477_ = 1 THEN
| Q478_ (R OR SP DEBTS AMOUNT in section SectionQ)
| Altogether, about how much would these other debts amount to?
| RANGE 0..999999996
|
| IF Q478_ = EMPTY THEN
| | IF X051 = 1 THEN
| | | Q479_Unf_Random := 3
| | ELSEIF X051 = 2 THEN
| | | Q479_Unf_Random := 5
| | ELSE
| | | Q479_Unf_Random := 6
| | END OF IF
|
| Q479_Unf (Unfolding in section SectionQ)
| Thinking about those other debts:
|
| Would it be more, about, or less than...
|
| Q479_Unf_Results := explode("'", Q479_Unf)
| END OF IF

Q517_ (IF CREDIT CARD DEBT in section SectionQ)
Does any of that debt include credit card debt?

```

1 Yes, some of it  
2 Yes, all of it  
5 No

**IF Q517\_ = 1 OR Q517\_ = 2 THEN**

**Q518\_** (PD OFF CRED CARD LAST MO in section SectionQ)

Last month did you( and your ^FLHWP) pay off all your credit card debt or was there an unpaid debt that you carried over to this month?

1 Paid off all  
5 Carried over unpaid debt

**IF Q518\_ != 1 THEN**

**Q519\_** (AMOUNT CRED CARD DEBT CARRIED OVER in section SectionQ)

How much credit card debt did you( and your ^FLHWP) carry over from last month to this one?

Please report the total amount owed, not the amount paid off or the minimum payment.

Please enter zero if all accounts were paid in full.  
RANGE 0..99999996

**IF Q519\_ = EMPTY THEN**

**IF X518 = 1 THEN**

| Q520\_Unf\_Random := 11

**ELSEIF X518 = 2 THEN**

| Q520\_Unf\_Random := 10

**ELSE**

| Q520\_Unf\_Random := 12

**END OF IF**

**Q520\_Unf** (Unfolding in section SectionQ)

Thinking about the credit card debt that was carried over from last month:

Was it more, about, or less than...

Q520\_Unf\_Results := explode("", Q520\_Unf)

**END OF IF**

**END OF IF**

**END OF IF**

**END OF IF**

**LOOP FROM 1 TO 3**

IF LScnt = 1 OR Q483\_(LScnt - 1) = 1 THEN

Fill code of question FLQ483Q1 executed

Fill code of question FLQ483Q2 executed

**Q483\_** (R OR SP IF LUMP SUM RECEIVED in section SectionQ)

(People sometimes receive large amounts of money or property in the form of an inheritance, a trust fund, an insurance settlement, and so on.

/) (Since ^Z092, ^Z093 have you^FLQspouse ever received money or property in the form of an inheritance, a trust fund, or an insurance settlement?/Since ^Z092, ^Z093 have you^FLQspouse ever received any other large lump sum payments?/In the last two years, have you^FLQspouse ever received money or property in the form of an inheritance, a trust fund, or an insurance settlement?/In the last two years, have you^FLQspouse ever received any other large lump sum payments?)

By 'large' we mean \$10,000 or more.

IF Q483\_(LScnt) = 1 THEN

Fill code of question FLQ484Q executed

#### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**Q484\_** (LUMP SUM FROM WHAT in section SectionQ)

What was the (next/) largest lump sum- -was it from an inheritance, a trust, an insurance settlement, or something else?

- 1 Insurance settlement
- 2 Pension settlement
- 3 Inheritance or trust
- 4 Gift
- 5 Lawsuit
- 7 Other, please specify:

**Q485S** (LUMP SUM FROM WHAT-SPECIFY in section SectionQ)

STRING

#### END OF GROUP

IF Q484\_(LScnt) = EMPTY OR Q484\_(LScnt) != EMPTY THEN

Fill code of question FLQ484A executed

**Q487\_** (YEAR LUMP SUM RECEIVED in section SectionQ)

In what year did you( or your ^FLHWP/) receive a lump sum from that (insurance settlement/pension settlement/inheritance or trust/gift/lawsuit/^Q485S(LSct))?  
RANGE 1900..(CURRENT CALENDAR YEAR())

IF Q487\_(LSct) > FLCurrentYear - 3 THEN

Q486\_ (MONTH LUMP SUM RECEIVED in section SectionQ)  
What month was that?

END OF IF

Q488\_ (LUMP SUM AMOUNT RECEIVED in section SectionQ)  
About how much did you( or your ^FLHWP/) receive from the (insurance settlement/pension settlement/inheritance or trust/gift/lawsuit/^Q485S(LSct))?  
RANGE 5000..250000

IF Q488\_(LSct) = EMPTY THEN

Q489\_ (LUMP SUM AMOUNT - GT-LT \$50K in section SectionQ)  
Did it amount to less than \$50,000, more than \$50,000, or what?  
1 Less than \$50,000  
3 About \$50,000  
5 More than \$50,000

END OF IF

IF Q484\_(LSct) = 3 THEN

Fill code of question FL\_Q490\_3 executed

Q490\_ (LUMP SUM - WHO FROM in section SectionQ)  
From whom was that inheritance or trust received, that is, what is their relationship to you?  
14 My parents  
15 My brother  
17 My sister  
27 Ex-spouse or ex-partner  
34 (My ^FLHWP's parents)  
19 Other relative  
20 Other individual

END OF IF

END OF IF

| END OF IF

END OF IF

END OF LOOP

**Q493\_** (Q ASSIST in section SectionQ)

How often did you receive assistance with the answers for the previous income and wealth assets questions?

- 1 Never
- 2 A few times
- 3 Most or all of the time

End of section **SectionQ**

Start of section **SectionR**

**IF Z076 = YES THEN**

**R\_intro** (Section SectionR)

Now we would like to ask you some questions about any changes in your family's finances since we last interviewed you.

First we will retrieve the financial information we have on record. Please click "Next" and wait until the next screen appears.

Start of section **PreloadR**

```
H004 := getHRSPreload(2,"H004_OwnRent")
H008 := getHRSPreload(2,"H008_OwnFarm")
H014 := getHRSPreload(2,"H014_OwnMobile")
H151 := getHRSPreload(2,"H151_Own2ndHome")
H020 := getHRSPreload(2,"H020_HomeValue1st")
H166 := getHRSPreload(2,"H166_HomeValue2nd")
R077_home := getHRSPreload(2, "R077_home")
preload_H004 := getHRSPreloadWave3(2,"H004_OwnRent")
preload_H008 := getHRSPreloadWave3(2,"H008_OwnFarm")
preload_H014 := getHRSPreloadWave3(2,"H014_OwnMobile")
```

**IF preload\_H004 = 1 OR preload\_H008 IN (1,2) OR preload\_H014 IN (1,2,3) THEN**

| X079 := 1

**END OF IF**

preload\_Q133 := getHRSPreloadWave3(5, "Q133\_")



IF preload\_Q133 IN (1,2) THEN

| Z098 := 1

END OF IF

preload\_Q147 := getHRSPreloadWave3(5, "Q147\_")

IF preload\_Q147 IN (1,2) THEN

| X086 := 1

END OF IF

X027 := getHRSPreloadWave3(2, "H151\_Own2ndHome")

X087 := getHRSPreloadWave3(5, "Q316\_")

preload\_hhmembercounter := getHRSPreloadWave3(1,"hhmembercounter")

hhmembercounter := getHRSPreload(1,"hhmembercounter")

#### End of section PreloadR

Fill code of question FLQspouse executed

Fill code of question FLQspouse2 executed

IF X079 = 1 OR H004 = 1 OR H151 = 1 OR H014 IN (1,2,3) OR H008 IN (1,2)  
THEN

**R002** (bought or sold home in section SectionR)

Since (January/February/March/April/May/June/July/August/September/October/November/December),  
(()), have you( or your ^FLHWP/) bought or sold a home that was your primary resi-  
dence or second home?

IF R002 = YES THEN

**R003** (buy, sell, or both in section SectionR)

Did you only buy, only sell, or both buy and sell?

If there were multiple sales or multiple purchases, please select 'Other, please  
specify.'

1 Only bought

2 Only sold

3 Both bought and sold

7 Other, please specify:

IF r003 = 7 THEN

**R004** (other buy, sell, or both in section SectionR)

Please describe the transaction(s), including the month, year, and purchase price  
for each home.

STRING

END OF IF

IF R003 IN (1,3) THEN

**R006** (year bought home in section SectionR)  
In what year did you buy a home?  
RANGE (())..(CURRENT CALENDAR YEAR())

IF (FLCurrentYear - R006) < 3 THEN

**R005** (month bought home in section SectionR)  
What month was that?

END OF IF

**R007** (purchase price in section SectionR)  
What was the purchase price?

IF R007 = EMPTY THEN

R008\_Unf\_Random := 11

**R008\_Unf** (Unfolding in section SectionR)  
Thinking about the purchase price:

Was it more, about, or less than...

R008\_Unf\_Results := explode('~', R008\_Unf)

END OF IF

END OF IF

IF R003 IN (2,3) THEN

**R012** (year sold home in section SectionR)  
In what year did you sell a home?  
RANGE (())..(CURRENT CALENDAR YEAR())

IF (FLCurrentYear - R012) < 3 THEN

**R011** (month sold home in section SectionR)  
What month was that?

END OF IF

**R013** (selling price in section SectionR)  
What was the selling price?

IF R013 = EMPTY THEN

R014\_Unf\_Random := 11

**R014\_Unf** (Unfolding in section SectionR)

Thinking about the selling price:

Was it more, about, or less than...

R014\_Unf\_Results := explode("'", R014\_Unf)

END OF IF

**R018** (year bought sold home in section SectionR)

In what year did you buy the home that you sold?

RANGE 1900..(CURRENT CALENDAR YEAR())

IF (FLCurrentYear - R018) < 3 THEN

**R017** (month bought sold home in section SectionR)

What month was that?

END OF IF

**R019** (purchase price of sold home in section SectionR)

What was the purchase price of the home that you sold?

IF R019 = EMPTY THEN

R020\_Unf\_Random := 11

**R020\_Unf** (Unfolding in section SectionR)

Thinking about the purchase price of the home that you sold:

Was it more, about, or less than...

R020\_Unf\_Results := explode("'", R020\_Unf)

END OF IF

END OF IF

END OF IF

Fill code of question FLR023 executed

**R023** (any major improvements in section SectionR)

Since (January/February/March/April/May/June/July/August/September/October/November/December),  
(()), did you( or your ^FLHWP/) (make any major additions or home improvements to a  
primary residence or second home that you owned/make any major additions or home  
improvements to a primary residence that you owned)?

**IF R023 = YES THEN**

**R024** (amount of home improvements in section SectionR)

What was the dollar cost of these additions and improvements, plus the value of any work you may have done yourself?

**IF R024 = EMPTY THEN**

R025\_Unf\_Random := 11

**R025\_Unf** (Unfolding in section SectionR)

Thinking about the dollar cost of these additions and improvements:

Was it more, about, or less than...

R025\_Unf\_Results := explode("'", R025\_Unf)

**END OF IF**

**END OF IF**

**END OF IF**

**IF Z098 = 1 OR Q133\_ IN (1,2) THEN**

**R028** (sold any real estate in section SectionR)

Since (January/February/March/April/May/June/July/August/September/October/November/December),  
(()), have you( or your ^FLHWP/) sold any real estate other than your principal residence  
or second home, such as land, or rental or investment property?

**IF R028 != YES THEN**

**R029** (bought any real estate in section SectionR)

Have you bought any such real estate properties since (Jan-  
uary/February/March/April/May/June/July/August/September/October/November/December),  
(())?

**IF R029 = YES THEN**

**R030** (amount paid real estate in section SectionR)

About how much in total did you pay for this real estate?

**IF R030 = EMPTY THEN**

R031\_Unf\_Random := 11

**R031\_Unf** (Unfolding in section SectionR)

Thinking about how much you paid in total for this real estate:

Was it more, about, or less than...

R031\_Unf\_Results := explode("'", R031\_Unf)

| END OF IF  
END OF IF

**R044** (made any major improvements in section SectionR)  
Since (January/February/March/April/May/June/July/August/September/October/November/December),  
(()), did you( or your ^FLHWP/) make any major additions or home improvements  
to any real estate properties that you owned, other than your principal residence or  
second home?

Please do not count general maintenance or upkeep.

**IF R044 = YES THEN**

**R045** (cost of addition, improvements in section SectionR)  
What was the dollar cost of these additions and improvements, plus the value of  
any work you may have done yourself?

**IF R045 = EMPTY THEN**

R046\_Unf\_Random := 11

**R046\_Unf** (Unfolding in section SectionR)  
Thinking about the dollar cost of these additions and improvements:

Was it more, about, or less than...

R046\_Unf\_Results := explode("'", R046\_Unf)

**END OF IF**

**END OF IF**

**ELSE**

**R034** (also bought any real estate in section SectionR)  
Did you( and your ^FLHWP) also buy any real estate of this sort since (Jan-  
uary/February/March/April/May/June/July/August/September/October/November/December),  
(())?

**IF R034 != YES THEN**

**R035** (amount sold real estate in section SectionR)  
About how much in total was the dollar value of the real estate you sold since (Jan-  
uary/February/March/April/May/June/July/August/September/October/November/December),  
(())?

**IF R035 = EMPTY THEN**

R036\_Unf\_Random := 11

**R036\_Unf** (Unfolding in section SectionR)

Thinking about the total dollar value of the real estate you sold:

Was it more, about, or less than...

R036\_Unf\_Results := explode("'", R036\_Unf)

END OF IF

ELSE

**R039** (comparison bought versus sold real estate in section SectionR)

Overall, was the dollar cost of the real estate you bought greater than the dollar value of what you sold minus commissions, less than the value of what you sold, about equal, or what?

- 1 Bought more than sold
- 2 Bought less than sold
- 3 Bought and sold about equal amounts

IF R039 IN (1,2) THEN

Fill code of question FLR040 executed

**R040** (difference bought and sold in section SectionR)

Roughly, about how much (more/less) did you buy than you sold?

IF R040 = EMPTY THEN

R041\_Unf\_Random := 11

**R041\_Unf** (Unfolding in section SectionR)

Thinking about how much (more/less) you bought than you sold:

Was it more, about, or less than...

R041\_Unf\_Results := explode("'", R041\_Unf)

END OF IF

END OF IF

END OF IF

**R044** (made any major improvements in section SectionR)

Since (January/February/March/April/May/June/July/August/September/October/November/December),  
(()), did you( or your ^FLHWP/) make any major additions or home improvements  
to any real estate properties that you owned, other than your principal residence or  
second home?

Please do not count general maintenance or upkeep.

IF R044 = YES THEN

```

R045 (cost of addition, improvements in section SectionR)
What was the dollar cost of these additions and improvements, plus the value of
any work you may have done yourself?

IF R045 = EMPTY THEN
  R046_Unf_Random := 11

  R046_Unf (Unfolding in section SectionR)
  Thinking about the dollar cost of these additions and improvements:

  Was it more, about, or less than...

  R046_Unf_Results := explode("'", R046_Unf)
END OF IF
END OF IF
END OF IF
END OF IF

IF x086 = 1 OR Q147_ IN (1,2) THEN

R049 (put personal funds into privately held business in section SectionR)
Since (January/February/March/April/May/June/July/August/September/October/November/December),
(()), have you( or your ^FLHWP/) put personal funds into a privately held business,
professional practice, partnership or farm that you own or share ownership in?

IF R049 = YES THEN
  R050 (how much put into prviately held business in section SectionR)
  Altogether, about how much new money did you( or your ^FLHWP/) put into that,
  including any funds that you borrowed?

  IF R050 = EMPTY THEN
    R051_Unf_Random := 11

    R051_Unf (Unfolding in section SectionR)
    Thinking about how much new money you( or your ^FLHWP/) put into that:
    Was it more, about, or less than...

    R051_Unf_Results := explode("'", R051_Unf)
  END OF IF
END OF IF

R054 (sold privately held business in section SectionR)
Since (January/February/March/April/May/June/July/August/September/October/November/December),
(()), have you( or your ^FLHWP/) sold part or all of any interest in a privately held

```

business, professional practice, partnership or farm?

**IF R054 = YES THEN**

**R055** (how much sold interest for in section SectionR)

Altogether, about how much did you( or your ^FLHWP) sell your interest for? (What was the selling price?)

We are asking for the price the buyer paid.

**IF R055 = EMPTY THEN**

R056\_Unf\_Random := 11

**R056\_Unf** (Unfolding in section SectionR)

Thinking about how much you( or your ^FLHWP/) sold your interest for:

Was it more, about, or less than...

R056\_Unf\_Results := explode("'", R056\_Unf)

**END OF IF**

**R060** (year sold in section SectionR)

In what year did you sell that?

If there were multiple sales, please provide the year of the most recent sale.

RANGE (())..(CURRENT CALENDAR YEAR())

**IF (FLCurrentYear - R060) < 3 THEN**

**R059** (month of sale in section SectionR)

What month was that?

**END OF IF**

**END OF IF**

**END OF IF**

**IF x087 = 1 OR Q316\_ = 1 THEN**

**R061** (bought any stock in section SectionR)

Not counting any IRAs, Keoghs or pension accounts, since (January/February/March/April/May/June/July/August/September/October/November/December), (()), have you( or your ^FLHWP/) bought any stock, or put money into stock mutual funds, including any automatic reinvestments?

**IF R061 = YES THEN**

**R062** (sell or cash in any stock in section SectionR)

Did you( or your ^FLHWP/) also sell or cash in any such assets?



**IF R062 = YES THEN**

**R063** (more into stocks or more out of stocks in section SectionR)

Did you buy more or sell more - - that is, overall, did you put new money into stocks, stockmutual funds, managed investment accounts or trusts, take money out of them, or put inabout as much as you took out?

- 1 Put money in
- 2 Take money out
- 3 Put in as much as took out

**IF R063 IN (1,2) THEN**

**R064** (how much more in or out in section SectionR)

About how much more did you (put in than you took out/take out than you put in)?

**IF R064 = EMPTY THEN**

R065\_Unf\_Random := 11

**R065\_Unf** (Unfolding in section SectionR)

Thinking about how much more you (put in than you took out/take out than you put in):

Was it more, about, or less than...

R065\_Unf\_Results := explode("", R065\_Unf)

**END OF IF**

**END OF IF**

**ELSE**

**R068** (how much put into stocks in section SectionR)

Altogether, how much money (including any automatic reinvestment) did you( or your ^FLHWP/) put into that?

**IF R068 = EMPTY THEN**

R069\_Unf\_Random := 11

**R069\_Unf** (Unfolding in section SectionR)

Thinking about how much money (including any automatic reinvestment) you( or your ^FLHWP/) put into that:

Was it more, about, or less than...

R069\_Unf\_Results := explode("", R069\_Unf)

**END OF IF**

**END OF IF**

**ELSE**

```

R072 (sold any stock in section SectionR)
Since (January/February/March/April/May/June/July/August/September/October/November/December),
(()), have you( or your ^FLHWP/) sold any shares of stock in publicly held corporations
or taken money out of any mutual funds, managed investment accounts or trusts?

IF R072 = YES THEN
  R073 (how much sold stocks in section SectionR)
  Altogether, how much money did you( or your ^FLHWP/) get from that?

  IF R073 = EMPTY THEN
    R074_Unf_Random := 11

    R074_Unf (Unfolding in section SectionR)
    Thinking about how much money you( or your ^FLHWP/) got from that:

    Was it more, about, or less than...

    R074_Unf_Results := explode("'", R074_Unf)
  END OF IF
END OF IF
END OF IF
END OF IF

IF X079 != 1 OR R077_home = YES THEN
ELSE
  IF R002 = 5 THEN
    GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

    R077 (what happened to owned home in section SectionR)
    Our records show that you( and your ^FLHWP) owned a home in (Jan-
    uary/February/March/April/May/June/July/August/September/October/November/December),
    (() that you do not now own and did not sell.

    What happened to that home?
    1 Gave it to someone
    2 Did not own home in (January/February/March/April/May/June/July/August/September/October/November/D
    (())
    7 Other, please specify:

    R078 (other what happened to owned home in section SectionR)
    STRING

```

END OF GROUP

IF R077 = 1 THEN

Fill code of question FLR080 executed

**R079** (who give home to in section SectionR)

Who did you( or your ^FLHWP/) give the house to, that is what is their relationship to you?

2 (Child, child-in-law, or grandchild/Child or child-in-law/Child or grandchild/Child-in-law or grandchild/Child/Child-in-law/Grandchild)

3 Other relative

4 Someone else

IF R079 = 2 THEN

FL\_CHILDLIST := getHRSPreload(1, "FL\_CHILDLIST", 2)

**R103** (which child gave home to in section SectionR)

Which child is that? Please choose all that apply.

Note: if you gave it to a grandchild, please choose the parent of that grand-child.

3 ((3))

4 ((4))

5 ((5))

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51 ((51))  
52 ((52))  
92 Deceased child  
93 All children

END OF IF

END OF IF

END OF IF

IF R003 = 2 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**R081** (what did with proceeds of home sale in section SectionR)

Our records show that you owned a home in (January/February/March/April/May/June/July/August/September/October/November/December),  
(()) that you have since sold. What did you decide to do with the proceeds from  
selling the house?

1 Invested the money

2 Gave the proceeds to someone

3 Did not own a home in (January/February/March/April/May/June/July/August/September/October/November/December),  
(())

7 Other, please specify:

**R082** (other what did with proceeds of home sale in section SectionR)

STRING

END OF GROUP

END OF IF

END OF IF

**R083** (anyone move out took assets or debts in section SectionR)

Sometimes changes in a family's savings or assets are due to people joining or leaving the family.

Was there anyone living with you( and your ^FLHWP) in (January/February/March/April/May/June/July/August/September/October/November/December), (( )) who doesn't live with you now and who took \$5,000 or more in assets or debts away with them?

1 Yes, took assets

2 Yes, took debts

3 Both assets and debts

5 No

IF R083 IN (1,3) THEN

**R084** (value of removed assets in section SectionR)

Altogether, what is the total dollar value of assets that were removed that way?

IF R084 = EMPTY THEN

R085\_Unf\_Random := 11

**R085\_Unf** (Unfolding in section SectionR)

Thinking about the total dollar value of assets that were removed that way:

Was it more, about, or less than...

R085\_Unf\_Results := explode("'", R085\_Unf)

END OF IF

END OF IF

IF R083 IN (2,3) THEN

**R088** (value of removed debts in section SectionR)

Altogether, what is the total dollar value of debts that were removed that way?

IF R088 = EMPTY THEN

```

R089_Unf_Random := 11

R089_Unf (Unfolding in section SectionR)
Thinking about the total dollar value of debts that were removed that way:

Was it more, about, or less than...

R089_Unf_Results := explode("'", R089_Unf)
END OF IF
END OF IF

R092 (anyone move out took assets or debts in section SectionR)
Is there anyone in your family living with you( and your
^FLHWP) now who has joined the family since (Jan-
uary/February/March/April/May/June/July/August/September/October/November/December),
(( )) and who had $5,000 or more in assets or debts at the time they joined the family?
1 Yes, had assets
2 Yes, had debts
3 Both assets and debts
5 No

IF R092 IN (1,3) THEN
R093 (value of added assets in section SectionR)
Altogether, what was the total dollar value of assets that were brought into the family in
that way?

IF R093 = EMPTY THEN
R094_Unf_Random := 11

R094_Unf (Unfolding in section SectionR)
Thinking about the total dollar value of assets that were brought into the family in that
way:

Was it more, about, or less than...

R094_Unf_Results := explode("'", R094_Unf)
END OF IF
END OF IF

IF R092 IN (2,3) THEN
R097 (value of added debts in section SectionR)
Altogether, what was the total dollar value of debts that were brought into the family in
that way?

```

**IF R097 = EMPTY THEN**

R098\_Unf\_Random := 11

**R098\_Unf** (Unfolding in section SectionR)

Thinking about the total dollar value of debts that were brought into the family in that way:

Was it more, about, or less than...

R098\_Unf\_Results := explode("'", R098\_Unf)

**END OF IF**

**END OF IF**

**R101** (how often assistance in section SectionR)

How often did you receive assistance with answers to the questions in this section?

1 Never

2 A few times

3 Most or all of the time

**END OF IF**

End of section **SectionR**

Start of section **Closing**

**CS\_001** (HOW PLEASANT INTERVIEW in section Closing)

Could you tell us how interesting or uninteresting you found the questions in this survey?

1 Very interesting

2 Interesting

3 Neither interesting nor uninteresting

4 Uninteresting

5 Very uninteresting

**CS\_003** (comments in section Closing)

Do you have any other comments on the survey? Please type these in the box below.(If you have no comments, please click next to complete this survey.)

STRING

End of section **Closing**

/\* Please note that although question CS\_003 is listed in the routing, the answers are not included in the microdata in the event identifiable information is captured. Cleaned responses are available by request. \*/