# UnderStandingAmericaStudy 

UAS 189: HEALTH AND RETIREMENT STUDY, SECTIONS Q-R


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## 1 INTRODUCTION

This UAS panel survey, titled "UA189: Health and Retirement Study Sections Q-R", administers the Health and Retirement Study sections 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

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

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

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.

## 2 SURVEY RESPONSE AND DATA

### 2.1 Sample selection and response rate

The sample selection for this survey was:
All active respondents who completed HRS Wave $3 \mathrm{~J}-\mathrm{M}$ (UAS187).
As such, this survey was made available to 8433 UAS participants. Of those 8433 participants, 8262 completed the survey and are counted as respondents. Of those who are not counted as respondents, 50 started the survey without completing and 121 did not start the survey. The overall response rate was $97.97 \%$.

Note: We are unable to provide sample weights for a small number of UAS members (see the Sample 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:

| UAS189 - Response Overview |  |
| :--- | ---: |
| Size of selected sample | 8433 |
| Completed the survey | 8262 |
| Started but did not complete the survey | 50 |
| Did not start the survey | 121 |
| Response rate | $97.97 \%$ |

### 2.2 Timings

The survey took respondents an average of 13 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

Weights are included in the data set for this survey. 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. For more details on the UAS weighing procedures please refer to the UAS Weighting Procedures V1. Please contact UAS staff with any questions.

## 3 STANDARD VARIABLES

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 is 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 $A B S$ 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

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 $\mathrm{s} / \mathrm{he}$ 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.


## 4 BACKGROUND DEMOGRAPHICS

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.
- hisplatino: 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 (AfricanAmerican).
- 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 (AsianAmerican).
- 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 hisplatino, 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_\#F 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.


## 5 MISSING DATA CONVENTIONS

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 singleresponse 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.

## 6 ROUTING SYNTAX

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.

## 7 SURVEY WITH ROUTING

Start of section PreloadQ
intro1(Section PreloadQ)
In this survey we would like to ask you some questions about your income and assets.
previous_endtime := getHRSpreloadWave2(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 := getHRSpreloadWave2(1,"A167_A028")
Z125 := getHRSpreloadWave2(3, "J478")
Z126 := getHRSpreloadWave2(5, "Q084-")
Z127 := getHRSpreloadWave2(5, "Q105_")
preload_Q134_ := getHRSpreloadWave2(5, "Q134_")
preload_Q148_ := getHRSpreloadWave2(5, "Q148_")
preload_Q345_ := getHRSpreloadWave2(5, "Q345_")
preload_Q331_ := getHRSpreloadWave2(5, "Q331_")
preload_Q317_ := getHRSpreloadWave2(5, "Q317_")
preload_Q357_ := getHRSpreloadWave2(5, "Q357_")
preload_Q371_ := getHRSpreloadWave2(5, "Q371_")
preload_Q467_ := getHRSpreloadWave2(5, "Q467_")
Q134_compare := preload_Q134_
```

```
Q148_compare := preload_Q148_
Q345_compare := preload_Q345_
Q331_compare := preload_Q331_
Q317_compare := preload_Q317_
Q357_compare := preload_Q357_
Q371_compare := preload_Q371_
Q467_compare := preload_Q467_
IF Q134_compare = EMPTY THEN
| Q134_compare := -1
END OF IF
IF Q148_compare = EMPTY THEN
| Q148_compare := -1
END OF IF
IF Q345_compare = EMPTY THEN
| Q345_compare := -1
END OF IF
IF Q331_compare = EMPTY THEN
| Q331_compare := -1
END OF IF
IF Q317_compare = EMPTY THEN
| Q317_compare := -1
END OF IF
IF Q357_compare = EMPTY THEN
| Q357_compare := -1
END OF IF
IF Q371_compare = EMPTY THEN
| Q371_compare := -1
END OF IF
IF Q467_compare = EMPTY 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 FLTwo Years executed
Fill code of question FLTwoYearsCaps 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 := getHRSpreloadWave2(5,"X041")
    x042 := getHRSpreloadWave2(5,"X042")
x043 := getHRSpreloadWave2(5,"X043")
x044 := getHRSpreloadWave2(5,"X044")
x045 := getHRSpreloadWave2(5,"X045")
x046 := getHRSpreloadWave2(5,"X046")
x047 := getHRSpreloadWave2(5,"X047")
x048 := getHRSpreloadWave2(5,"X048")
x049 := getHRSpreloadWave2(5,"X049")
x050 := getHRSpreloadWave2(5,"X050")
x052 := getHRSpreloadWave2(5,"X052")
x051 := getHRSpreloadWave2(5,"X051")
x516 := getHRSpreloadWave2(5,"X516")
x517 := getHRSpreloadWave2(5,"X517")
x518 := getHRSpreloadWave2(5,"X518")
x519 := getHRSpreloadWave2(5,"X519")
x520 := getHRSpreloadWave2(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 ${ }^{\wedge}$ 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. 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 (${ }^{\wedge}$ LHWP) 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 ${ }^{\wedge}$ 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( ${ }^{(\sim)}$, 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('" ${ }^{(\cdots)}$, 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.. }9999999
    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 ( ${ }^{(F L H W P) ~ h a v e ~ a n y ~ i n c o m e ~}$ 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( ${ }^{(\sim)}$, 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 ${ }^{\text {FLQ }}$ 014A income in ${ }^{\wedge}$ InitA061TLCY_A come from a professional practice or trade?/Did any of your ${ }^{\wedge}$ 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( \({ }^{(\sim,}\), 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
        |061_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?
    ELSE
    |065 := 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 ${ }^{\wedge}$ InitA061TLCY_A, before taxes and other deductions?/How much did you receive from Unemployment Compensation in ${ }^{\wedge}$ 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 ${ }^{\wedge}$ InitA061TLCY_A:
/Thinking about the Unemployment Compensation you received in ${ }^{\wedge}$ InitA061TLCY_A:
)Was it more, about, or less than...
Q067_Unf_Results := explode( ${ }^{(\sim}$, 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?
    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
\({ }^{\text {InitAA061TLCY_A: }}\)
/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.. }300
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(`~,}\mathrm{ (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 Se-
```

```
curity 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.. }300
    IF Q091 = EMPTY THEN
    IF X512 = 1 THEN
    | Q092_Unf_Random := 11
    ELSEIF X512 = 2 THEN
    |092_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('~,}\mathrm{ (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 ${ }^{\text {FLHWP/ }}$ ) receive any income last month from Supplemental Security Income, also called SSI?
(DEF: SSI is a program administered by the Social Security Administration which makes assistance payments to low income, blind, disabled, and aged persons. A person may be receiving either or both SSI and Social Security checks.)

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 ${ }^{\wedge}$ FLQ013/did your ${ }^{\wedge}$ 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
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(" ${ }^{(\sim}$, 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 ${ }^{\wedge}$ FLQ013/your ${ }^{\wedge}$ 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?
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 ${ }^{\wedge}$ FLQ013/your ${ }^{\wedge}$ 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 ${ }^{\wedge}$ 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 that?
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 benefits?
    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('",}\mp@subsup{}{(}{\prime\prime},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 benefits?
    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 ${ }^{\text {FLHWP/) }}$ ) 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
GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN
Q134_(REAL ESTATE ASSET AMOUNT in section SectionQ)
If you sold all that 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,

tered differs \begin{tabular}{l}
to <br>
greatly <br>
from

 your amount 

last <br>
survey

 in 

en- <br>
(Jan-
\end{tabular} uary/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.

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)

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 (that property/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?
1 Every week
2 Twice per month
3 Every month
4 Every quarter
5 Every 6 months
6 Every year
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 income or rent 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 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
    GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN
    Q148_(BUSINESS OR FARM EQUITY AMOUNT in section SectionQ)
    If you sold all that and then paid off any debts on it, about how much would you get?
    RANGE 5000..4000000
    q148_diffwarning (Section SectionQ)
\begin{tabular}{llllllll} 
According to our & records, & \multicolumn{2}{l}{ the } & amount & you & en- \\
tered & differs & greatly & from & your & last & survey & in
\end{tabular} (Jan-
```

uary/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.

```
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)
    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 that farm or business?
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?
1 Every week
2 Twice per month
3 Every month
4 Every quarter
5 Every 6 months
6 Every year
7 Other, please specify:
Q154S (INCOME FROM FARM OR BUSINESS FREQUENCY- -OTHER in sec-
tion 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 did you receive (last week/last month/last quarter/last time) from
    that farm or business, 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 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 did you( and your \({ }^{\wedge}\) 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 \({ }^{\wedge}\) 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 ${ }^{\wedge}$ 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 ${ }^{\wedge} F L Q 014 A$ ?)
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 accounts, /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)
Is it more, about, or less than...
Q167_Unf_Results(IRAcnt) := explode( $\left.{ }^{(\sim \sim}, ~ Q 167 \_U n f(I R A c n t)\right)$

## 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 it 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 ${ }^{\text {FLHWP/) }}$ 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 \text { Quarter}
5 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 ${ }^{\text {}}$ 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 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 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)
    Was it more, about, or less than...
    Q187_Unf_Results := explode(`~,}\mp@subsup{\mp@code{N187_Unf)}}{(~}{\prime
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 this annuity, before taxes
    and other deductions?
    Please enter zero if you are not yet receiving income from this annuity.
    RANGE 0.. }9999999
    Q194_(INC FROM OTHER IRA ANNUITY PER in section SectionQ)
    Per:
    3 Month
    4 \text { Quarter}
    5 Month
    6 \text { 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?
    Q197_(YEAR STARTED ANNUITY INC FR OTHER IRA in section SectionQ)
    In what year did you( or your ^FLHWP/) start to receive that annuity?
    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 \text { Until the money runs out}
    7 Other, please specify:
    Q201_ (NUMBER YRS RECV ANNUITY FROM OTHER IRA in section Sec-
    tionQ)
    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 from the cashed in 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)
Was it more, about, or less than...
Q205_Unf_Results := explode(, ${ }^{\sim}$, Q205_Unf)
END OF IF
END OF IF
END OF IF
Q215-(Section SectionQ)
Not including Social Security or other retirement income you've 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?
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 $=1 \mathrm{THEN}$
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( ${ }^{(\cdots)}$, Q221_Unf(PENcnt))
END OF IF
Q224_(R TAX WITHHELD ON PENSION in section SectionQ)
Were any federal income taxes withheld on that?
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)
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 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 stop, continueunchanged, 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( ${ }^{(\sim,}$, Q239_Unf)
END OF IF
Q242_(TAXES W/HELD OTR PENSIONS in section SectionQ)
Were any federal income taxes withheld on these?
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.. }2
    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 ${ }^{\wedge}$ FLHWP currently receives.
How much did ${ }^{\text {FFLQ131 }}$ receive last month from the largest/How much did ${ }^{\wedge} F L Q 131$ receive last month from the other/How much did ^FLQ131 receive last month from the next largest/How much did ${ }^{\text {FLQ131 receive last month from that) }}$ 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( ${ }^{(\sim,}$, Q247_Unf(PENcnt))

## END OF IF

Q250_(SP TAX WITHHELD ON PENSION in section SectionQ)
Were any federal income taxes withheld on that?
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 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 ${ }^{\wedge}$ FLQ131 were to die before then,/If ${ }^{\wedge}$ FLQ131 were to die,) would the payment 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 \({ }^{\wedge}\) 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 \({ }^{\wedge}\) 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)
Aside from anything you have already mentioned, are you( or your ${ }^{\text {FFLHWP/) currently re- }}$ ceiving 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?
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 ${ }^{\wedge}$ 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(, $\left.{ }^{\sim}, ~ Q 279 \_U n f(A N N c n t)\right)$
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 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.. }10
```

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 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.. }9999999
    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 ${ }^{\wedge}$ FLHWP receives.
How much did ${ }^{\wedge}$ FLQ131 receive last month from that annuity,/How much did ${ }^{\wedge}$ FLQ131 receive last month from the second annuity payment,/How much did ${ }^{\wedge}$ 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 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 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( \({ }^{(\sim}\), 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 annu-
        ities 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?
    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 ${ }^{\wedge}$ 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 ${ }^{\text {^FLHWP }}$ jointly, by you only, or by your ^FLHWP only.
/)Aside from anything you have already told us about, 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
GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN
Q317_(STOCKS TOTAL VALUE in section SectionQ)
If you( or your ${ }^{\wedge}$ FLHWP/) sold all those and paid off anything you owed on them, about how much would you have?
RANGE 1000.. 2000000
q317_diffwarning (Section SectionQ)
$\begin{aligned} & \text { According to } \\ & \text { tered }\end{aligned}$ differs $\begin{gathered}\text { our } \\ \text { greatly } \\ \text { from }\end{gathered}$ your the $\begin{gathered}\text { amount } \\ \text { survey }\end{gathered} \begin{gathered}\text { you } \\ \text { in }\end{gathered} \begin{gathered}\text { en- } \\ \text { (Jan- }\end{gathered}$ uary/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.

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) 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 is it 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 Every month
4 Every quarter
5 Every 6 months
6 Every year
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 payment from these stocks or 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 ${ }^{\wedge}$ FLHWP/) get about the same amount 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 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)
Aside from anything you have already told us about, 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
GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN
Q331_(BOND ASSETS TOTAL VALUE in section SectionQ)
If you( or your ${ }^{\wedge}$ 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 en-
tered differs greatly from your last survey in (Jan-
uary/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.
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)
    Would it be more, about, or less than...
Q332_Unf_Results := explode('~,}\mp@subsup{}{}{\prime},\mathrm{ 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 is it paid?
    1 It accumulates or is reinvested
    3 Every month
    4 Every quarter
    5 Every }6\mathrm{ months
    6 \text { Every year}
    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 payment from these
    bond or bond funds, before taxes and other deductions?
    RANGE 0.. }9999999
    IF Q338_ != EMPTY THEN
    Q339_(BOND INCOME AMOUNT SAME PER PERIOD in section SectionQ)
    Do you( or your ^FLHWP/) get about the same amount 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 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(`~,}\mp@subsup{}{}{(~,}\mathrm{ Q341_Unf)
    END OF IF
    END OF IF
END OF IF
END OF IF
Q344_(CHECKING SAVINGS MARKET FUNDS in section SectionQ)
```

Aside from anything you have already told us about, do you( or your ${ }^{\text {FLHWP/) }}$ have any checking or savings accounts or money market funds?

Please do not include CDs (Certificates of Deposit).
IF Q344_ = 1 THEN
GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN
Q345_(CHECKING TOTAL VALUE in section SectionQ)
If you added up all such accounts, about how much would they amount to right now? RANGE $0 . .300000$
q345_diffwarning (Section SectionQ)
 uary/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.

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)
Would it be more, about, or less than...
Q346_Unf_Results := explode(" ${ }^{(\sim)}$ 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 is it paid?
    1 It accumulates or is reinvested
    3 Every month
    4 \text { Every quarter}
    5 Every }6\mathrm{ months
    6 \text { Every year}
    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 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 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 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?
    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( ${ }^{(\sim}$, Q494_Unf)
END OF IF
END OF IF
END OF IF
END OF IF
Q356_(CDS GOVT SAVINGS TBILLS in section SectionQ)
Aside from anything you have already told us about, 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
GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN
Q357_(CDS GOVT SAVINGS TBILLS TOTAL VALUE in section SectionQ)
If you added up all such accounts, 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.

END OF GROUP
IF Q357_ = EMPTY THEN
IF X048 $=1$ THEN
| Q358_Unf_Random := 3
ELSEIF X048 = 2 THEN
| Q358_Unf_Random := 5
ELSE

```
    |358_Unf_Random := 6
    END OF IF
    Q358_Unf(Unfolding in section SectionQ)
    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 is it paid?
    1 It accumulates or is reinvested
    3 Every month
    4 Every quarter
    5 Every 6 months
    6 Every year
    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 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 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 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
```


## GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

```
Q371_(TRANSPORTATION TOTAL VALUE in section SectionQ) What are they worth altogether, minus anything you still owe on them? RANGE \(0 . .100000\)
q371_diffwarning (Section SectionQ)
\begin{tabular}{llllllll} 
According to our records, & the & amount & you & en- \\
tered differs & greatly & from & your & last & survey & in & (Jan-
\end{tabular}
```

```
    uary/February/March/April/May/June/July/August/September/October/November/December),
    (()): $(PRELOADED TRANSPORTATION TOTAL VALUE()). Please review your an-
    swer. If it is correct, select Next to continue. Otherwise please make the correction
    before continuing.
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)
    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 \({ }^{\text {FLHWP/) }}\) 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 \(F L H W P /\) ) sold all that 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)
    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 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.. }10000
    IF Q396_ = EMPTY THEN
    IF X508 = 1 THEN
    |397_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)
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
1 2 \text { 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 \text { June}
7 July
8 August
9 September
10 October
11 November
12 December
13 All months
1 4 \text { 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
I
ELSEIF A167_A028 = 1 AND (A030 = YES OR A209_LivTogethr = YES OR A033_SpInNHome
= 1) THEN
I
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)
    Per 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
    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
    Q427_Unf(Unfolding in section SectionQ)
    Per week, 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 MEM-
BERS/CHILDREN(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 ^\({ }^{\wedge}\) 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 MEM-
BERS/CHILDREN(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.. }9999999
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('~,}\mp@subsup{}{}{(~},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 that amount to, minus any debts (they/he/she/he/she)
    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)
        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 that 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)?
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 en-
tered differs greatly from your last survey in (Jan-
uary/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.
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)
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)
        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 that amount to?
RANGE \(0 . .99999996\)
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)
    Would it be more, about, or less than...
Q479_Un__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( ${ }^{(\sim}$, 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?)

Please define 'large' as \$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 ${ }^{\wedge}$ FLHWP/) receive a lump sum from that (insurance
settlement/pension settlement/inheritance or trust/gift/lawsuit/^Q485S(LScnt))?
RANGE 1900..(CURRENT CALENDAR YEAR())
IF Q487_(LScnt) > 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 ${ }^{\wedge}$ FLHWP/) receive from the (insurance settlement/pension settlement/inheritance or trust/gift/lawsuit/^Q485S(LScnt))?
RANGE 5000.. 250000

IF Q488_(LScnt) = 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_(LScnt) $=3$ 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 welast 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 := getHRSpreloadWave2(2,"H004_OwnRent")
preload_H008 := getHRSpreloadWave2(2,"H008_OwnFarm")
preload_H014 := getHRSpreloadWave2(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 := getHRSpreloadWave2(5, "Q133_")
IF preload_Q133 IN (1,2) THEN
| Z098 := 1
END OF IF
preload_Q147 := getHRSpreloadWave2(5, "Q147_")
IF preload_Q147 IN (1,2) THEN
X086 := 1
END OF IF
X027 := getHRSpreloadWave2(2, "H151_Own2ndHome")
X087 := getHRSpreloadWave2(5, "Q316_")
preload_hhmembercounter := getHRSpreloadWave2(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 \({ }^{\text {FFLHWP/) bought or sold a home that was your primary resi- }}\) dence or second home?
IF R002 = YES THEN
```

```
GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN
    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:
    R004 (other buy, sell, or both in section SectionR)
    STRING
END OF GROUP
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)
    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)
    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)
    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 ${ }^{\wedge}$ 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 (January/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)
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 ${ }^{\wedge}$ 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)
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 ${ }^{\wedge}$ 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 (January/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)
    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 whatyou 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)
    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)
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 ${ }^{\text {FLHWP/) put personal funds into a privately held business, }}$ 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 ^${ }^{\text {FLHWP/) put into that, }}$ including any funds that you borrowed?

IF R050 = EMPTY THEN
R051_Unf_Random := 11
R051_Unf(Unfolding in section SectionR)
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 ${ }^{\text {FLHWP/) sold part or all of any interest in a privately held }}$ 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)
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( ${ }^{(\sim)}$, 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 ${ }^{\wedge}$ 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 ^${ }^{\text {FLHWP/) put into that: }}$

Was it more, about, or less than...
R069_Unf_Results := explode( ${ }^{\sim}{ }^{\sim}$, 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 ${ }^{\wedge}$ 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
I
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 \text { Did not own home in (January/February/March/April/May/June/July/August/September/October/November/L}
    (())
    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-inlaw 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 grandchild.
3 ((3))
4 ((4))
5 ((5))
6 ((6))
7 ((7))
8 ((8))
9 ((9))
10 ((10))
11 ((11))
12 ((12))
13 ((13))
14 ((14))
15 ((15))
16 ((16))
17 ((17))
18 ((18))
19 ((19))
20 ((20))
21 ((21))
22 ((22))
23 ((23))
24 ((24))
25 ((25))
26 ((26))
27 ((27))
28 ((28))
29 ((29))
30 ((30))
31 ((31))
32 ((32))

```
    33 ((33))
        34 ((34))
        35 ((35))
        36 ((36))
        37 ((37))
        38((38))
        39 ((39))
        40 ((40))
        41 ((41))
        42 ((42))
        43 ((43))
        44 ((44))
        45 ((45))
        46 ((46))
        47 ((47))
        48 ((48))
        49 ((49))
        50 ((50))
        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
(())
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 thefamily.

Was there anyone living with you( and your ${ }^{\wedge}$ 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, assets
2 Yes, 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)
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) 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, assets
2 Yes, debts
3 Both assets and debts
5No
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)
    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)
    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. */

