

# UnderStandingAmericaStudy

UAS 534: HEALTH AND RETIREMENT STUDY, SECTIONS Q-R



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

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## 1 INTRODUCTION

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This UAS panel survey, titled "UAS534: 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

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

### 1.2 Experiments

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

### 1.3 Citation

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

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## 2 SURVEY RESPONSE AND DATA

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### 2.1 Sample selection and response rate

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The sample selection for this survey was:

All active respondents who completed HRS Wave 5 J-M (UAS532).

As such, this survey was made available to 11005 UAS participants. Of those 11005 participants, 10744 completed the survey and are counted as respondents. Of those who are not counted as respondents, 97 started the survey without completing and 164 did not start the survey. The overall response rate was 97.63%.

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

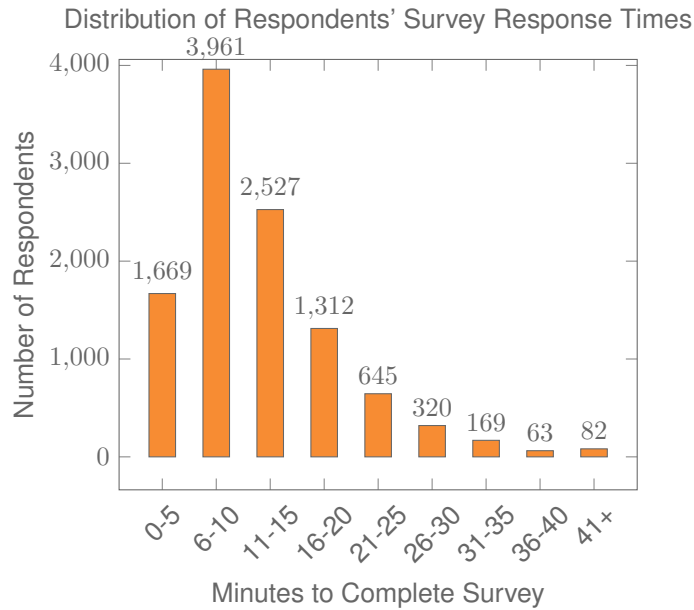
The detailed survey response rate is as follows:

UAS534 - Response Overview	
Size of selected sample	11005
Completed the survey	10744
Started but did not complete the survey	97
Did not start the survey	164
Response rate	97.63%

### 2.2 Timings

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



### 2.3 Sample & Weighting

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

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

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### 3 STANDARD VARIABLES

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Each Understanding America Study data set 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. These variables are based on the questions asked quarterly in the My Household survey after the application of a cleaning process (<https://uasdata.usc.edu/page/Data+Cleaning+Process>). They are the following:

- **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  $\text{jem}_{\text{uashhid}}/\text{em}_{\text{uashhid}}$ . For the primary respondent this identifier is 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 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).
- **uashhid.current**: the current household identifier of the respondent. Uniquely identifies the household a UAS panel member belongs to in a given survey INDEPENDENT of the exact composition of the household in terms of who else in the household are UAS members. Missing (.n) for respondents who are in a single-UAS member household at the time of survey start. Available on request in data sets prior to September 3, 2025.
- **survhhid**: uniquely identifies the household a UAS panel member belongs to in a given survey DEPENDENT on the exact composition of the household in terms of who else in the household are UAS members. Is set to missing (.n) if no other household members are UAS panel members at the time of the survey. Is set to unknown (.u) for respondents who last participated in the My Household survey prior to January 21, 2015.
- **uasmembers**: is the number of other household members who are also UAS panel members at the time of the survey. Since individuals can answer the same survey at different points in time (which can be relatively far apart if the survey is kept in the field for a prolonged time), it may be possible that, within the same data set, the primary respondent of a household has a value of '0', whereas the second UAS household respondent has a value of '1'. Therefore 'uasmembers' should be interpreted as the number of household and UAS panel members at the time the respondent answers the survey. Note: in the My Household survey 'uasmembers' is set to unknown (.u)

for respondents who last participated in the My Household survey prior to January 21, 2015.

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

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

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

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

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

1. ASDE 2014/01
2. ASDE 2014/01
3. ASDE 2014/01
4. Public records 2015/05
5. MSG 2015/07
6. MSG 2016/01
7. MSG 2016/01
8. MSG 2016/01
9. MSG 2016/02
10. MSG 2016/03

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

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

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

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

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

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

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## 4 DEMOGRAPHICS

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Every UAS survey data set also includes demographic variables, which provide background information about the respondent and their 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 demographic variables are based on the questions taken from the My Household survey after the application of the cleaning process.

The following variables are available in survey data sets after October 8, 2025:

- **sex**: indicates the sex of the respondent as assigned at birth. Is set to gender if the respondent has not filled out My Household after October 8, 2025.
- **genderid**: indicates the current gender of the respondent. Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025. Available in data sets after October 8, 2025.
- **dateofbirth\_year**: indicates the year of birth of the respondent.
- **age**: indicates 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. Is set to missing (.) if the respondent was not born in the U.S.
- **countryborn**: indicates the country in which the respondent was born. Is set to missing (.) if the respondent was born in the U.S.
- **statereside**: indicates 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**: indicates the marital status of the respondent.
- **livewithpartner**: indicates whether the respondent lives with a partner.
- **education**: indicates the highest level of education attained by the respondent.
- **white**: indicates whether the respondent identifies him or herself as white (Caucasian).
- **black**: indicates whether the respondent identifies him or herself as black (African-American).
- **nativeamer**: indicates whether the respondent identifies him or herself as Native American (American Indian or Alaska Native).
- **asian**: indicates whether the respondent identifies him or herself as Asian (Asian-American).
- **pacific**: indicates whether the respondent identifies him or herself as Native Hawaiian or Other Pacific Islander.
- **race**: indicates the race of the respondent as singular (e.g., '1 White' or '2 Black') or as mixed (in case the respondent identifies with two or more races). The value '6 Mixed' that the respondent answered 'Yes' to at least two of the single race categories. This variable is generated based on the values of the different race variables (white, black, nativeamer, asian, pacific). This composite measure is not conditional on hisplatinio, so an individual may identify as Hispanic or Latino, and also as a member of one or more racial groups.
- **race\_identify**: indicates the race the respondent identifies with most (if mixed). Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **hisplatinio**: indicates whether the respondent identifies him or herself as being Hispanic or Latino. This variable is asked separately from race.
- **mena**: indicates whether the respondent identifies as being of Middle Eastern or North African ancestry. Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **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.
- **workemployer**: indicates whether the respondent works for an employer. Is set to missing (".e") if no answer for laborstatus was given by the respondent. Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **workself**: indicates whether the respondent is self-employed. Is set to missing (".e") if no answer for laborstatus was given by the respondent. Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **homemaker**: indicates whether the respondent is a homemaker. Is set to missing (".e") if no answer for laborstatus was given by the respondent. Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **student**: indicates whether the respondent is a student. Is set to missing (".e") if no answer for laborstatus was given by the respondent. Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **notworking**: indicates whether the respondent is not working and not looking for work. Is set to missing (".e") if no answer for laborstatus was given by the respondent. Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **If\_other**: indicates whether the respondent has another 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).
- **hourswork**: indicates the number of hours the respondent works per week. Is set to missing (.) if the respondent is not currently working or currently on sick or other leave.
- **hhincome**: indicates 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. Based on the hhmemberin variables if the respondent has not filled out My Household after October 8, 2025. Based on hhcomp\_total if the respondent has filled out My Household after October 8, 2025.
- **hhmembervar**: 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 'hhmembnumber' is missing if the respondent did not provide the number of household members at the time of the survey. Based on the hhmemberin variables if the respondent has not filled out My Household after October 8, 2025. Based on hhcomp\_total if the respondent has filled out My Household after October 8, 2025.

- **hhcomp\_male\_0\_3**: indicates the number of male children ages 0 through 4 who are living in the respondent's household right now (even if they only live with the respondent part-time or temporarily). Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **hhcomp\_female\_0\_3**: indicates the number of female children ages 0 through 4 who are living in the respondent's household right now (even if they only live with the respondent part-time or temporarily). Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **hhcomp\_other\_0\_3**: indicates the number of other-gendered children ages 0 through 4 who are living in the respondent's household right now (even if they only live with the respondent part-time or temporarily). Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **hhcomp\_male\_4\_12**: indicates the number of male children ages 5 through 12 who are living in the respondent's household right now (even if they only live with the respondent part-time or temporarily). Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **hhcomp\_female\_4\_12**: indicates the number of female children ages 5 through 12 who are living in the respondent's household right now (even if they only live with the respondent part-time or temporarily). Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **hhcomp\_other\_4\_12**: indicates the number of other-gendered children ages 5 through 12 who are living in the respondent's household right now (even if they only live with the respondent part-time or temporarily). Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **hhcomp\_male\_13\_17**: indicates the number of male children ages 13 through 17 who are living in the respondent's household right now (even if they only live with the respondent part-time or temporarily). Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **hhcomp\_female\_13\_17**: indicates the number of female children ages 13 through 17 who are living in the respondent's household right now (even if they only live with the respondent part-time or temporarily). Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **hhcomp\_other\_13\_17**: indicates the number of other-gendered children ages 13 through 17 who are living in the respondent's household right now (even if they only

live with the respondent part-time or temporarily). Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.

- **hhcomp\_male\_18\_64**: indicates the number of male adults ages 18 through 64 who are living in the respondent's household right now (even if they only live with the respondent part-time or temporarily). Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **hhcomp\_female\_18\_64**: indicates the number of female adults ages 18 through 64 who are living in the respondent's household right now (even if they only live with the respondent part-time or temporarily). Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **hhcomp\_other\_18\_64**: indicates the number of other-gendered adults ages 18 through 64 who are living in the respondent's household right now (even if they only live with the respondent part-time or temporarily). Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **hhcomp\_male\_65plus**: indicates the number of male adults ages 65 or older who are living in the respondent's household right now (even if they only live with the respondent part-time or temporarily). Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **hhcomp\_female\_65plus**: indicates the number of female adults ages 65 or older who are living in the respondent's household right now (even if they only live with the respondent part-time or temporarily). Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **hhcomp\_other\_65plus**: indicates the number of other-gendered adults ages 65 or older who are living in the respondent's household right now (even if they only live with the respondent part-time or temporarily). Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **hhcomp\_total\_18\_64**: indicates the total number of adults 18 through 64 who are living in the respondent's household right now (even if they only live with the respondent part-time or temporarily). Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **hhcomp\_total\_65plus**: indicates the total number of adults 65 or older who are living in the respondent's household right now (even if they only live with the respondent part-time or temporarily). Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **hhcomp\_total\_adults**: indicates the total number of adults who are living in the respondent's household right now (even if they only live with the respondent part-time or temporarily). Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.

- **hhcomp\_total\_children**: indicates the total number of children who are living in the respondent's household right now (even if they only live with the respondent part-time or temporarily). Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **hhcomp\_total**: indicates the total number of people who are living in the respondent's household right now (even if they only live with the respondent part-time or temporarily). Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **parent\_guardian\_a**: indicates whether the respondent is the parent or guardian of one or more children ages 0 to 4. Is set to missing (".a") if hhcomp\_total\_children is not greater than 0. Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **parent\_guardian\_b**: indicates whether the respondent is the parent or guardian of one or more children ages 5 to 12. Is set to missing (".a") if hhcomp\_total\_children is not greater than 0. Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.
- **parent\_guardian\_c**: indicates whether the respondent is the parent or guardian of one or more children ages 13 to 17. Is set to missing (".a") if hhcomp\_total\_children is not greater than 0. Is set to missing (".v") if the respondent has not filled out My Household after October 8, 2025.

The following variables were provided up until October 8, 2025. Several remain available in data sets created after October 8, 2025 on request.

- **gender**: indicates the gender of the respondent. Available in data sets before October 9, 2025.
- **countryborn\_other**: indicates the country of birth if that country is not on the drop down list of countries shown to the respondent'.
- **hisplatinogroup**: indicates which Hispanic or Latino group a respondent identifies him or herself with. Is set to missing (.) if the respondent does not identify him or herself as being Hispanic or Latino. Available in data sets after October 8, 2025 on request.
- **employmenttype**: indicates the employment type of the respondent (employed by the government, by a private company, a nonprofit organization, or self-employed). Is set to missing (.) if the respondent is not currently working or currently on sick or other leave. Available in data sets before October 9, 2025.
- **workfullpart**: indicates whether the respondent works full or part-time. Is set to missing (.) if the respondent is not currently working or currently on sick or other leave. Available in data sets before October 9, 2025.

- **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. Available in data sets before October 9, 2025. Available in data sets after October 8, 2025 on request.

- **hhmembergen\_#**: indicates the gender of the household member as reported by the respondent. Available in data sets before October 9, 2025. Available in data sets after October 8, 2025 on request.
- **hhmemberage\_#**: indicates the age of the household member. The age is derived from the month and year of birth of the household member as reported by the respondent. Available in data sets before October 9, 2025. Available in data sets after October 8, 2025 on request.
- **hhmemberrel\_#**: indicates the relationship of the respondent to the household member as reported by the respondent. Available in data sets before October 9, 2025. Available in data sets after October 8, 2025 on request.
- **hhmemberuasid\_#**: indicates the 'uasid' of the 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'. Available in data sets before October 9, 2025. Available in data sets after October 8, 2025 on request.

Lastly, data sets created after May 8, 2025 include an urbanicity variable. It is based on panel members' current census tract of residence and the 2010 Rural-Urban Commuting Area (RUCA) codes released by the US Department of Agriculture's Economic Research Service. To preserve confidentiality, the UAS collapses the 10 primary RUCA codes to 4

levels: Metropolitan, Micropolitan, Small/Rural, and Unknown. The Metropolitan level corresponds to primary RUCA codes 1-3, the Micropolitan level corresponds to RUCA codes 4-6, and the Small/Rural UAS classification corresponds to RUCA codes 7-10.

For detailed information and definitions of the 10 primary RUCA codes, please visit the USDA ERS Rural-Urban Commuting Area Codes site. Surveys conducted completely prior to May 8, 2025 will have an urbanicity data variable available on request. Data sets created after February 6, 2026 contain two urbanicity variables (urbanicity2010 and urbanicity2020, based on the 2010 and 2020 RUCA codes respectively). Information regarding differences between the 2010 and 2020 codes is located [here](#).

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## 5 MISSING DATA CONVENTIONS

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

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

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

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

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## 6 ROUTING SYNTAX

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

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

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

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

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

---

## 7 SURVEY WITH ROUTING

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### Start of section **PreloadQ**

#### **intro1** (Section PreloadQ)

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

```
previous_z076 := getHRSPreloadWave4(6,"z076")
previous_endtime := getHRSPreloadWave4(6,"endtime")
```

#### **IF previous\_endtime = RESPONSE THEN**

```
| Z076 := YES
```

#### **ELSE**

```
| Z076 := NO
```

#### **END OF IF**

```
Q134_compare := -1
Q148_compare := -1
Q166_compare := -1
Q345_compare := -1
Q331_compare := -1
Q317_compare := -1
Q357_compare := -1
Q371_compare := -1
Q376_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 := getHRSPreloadWave4(1,"A167_A028")
Z125 := getHRSPreloadWave4(3,"J478")
Z126 := getHRSPreloadWave4(5,"Q084_")
Z127 := getHRSPreloadWave4(5,"Q105_")
preload_Q134_ := getHRSPreloadWave4(5,"Q134_")
preload_Q148_ := getHRSPreloadWave4(5,"Q148_")
preload_Q166_(1) := getHRSPreloadWave4(5,"Q166_(1)")
preload_Q166_(2) := getHRSPreloadWave4(5,"Q166_(2)")
preload_Q166_(3) := getHRSPreloadWave4(5,"Q166_(3)")
preload_Q345_ := getHRSPreloadWave4(5,"Q345_")
```

```

preload_Q331_ := getHRSPreloadWave4(5, "Q331_")
preload_Q317_ := getHRSPreloadWave4(5, "Q317_")
preload_Q357_ := getHRSPreloadWave4(5, "Q357_")
preload_Q371_ := getHRSPreloadWave4(5, "Q371_")
preload_Q376_ := getHRSPreloadWave4(5, "Q376_")
preload_Q467_ := getHRSPreloadWave4(5, "Q467_")
Q134_compare := str_replace(", ", "", preload_Q134_)

IF (preload_Q166_(1) = response) THEN
| Q166_compare := Q166_compare + str_replace(", ", "", preload_Q166_(1))
END OF IF

IF (preload_Q166_(2) = response) THEN
| Q166_compare := Q166_compare + str_replace(", ", "", preload_Q166_(2))
END OF IF

IF (preload_Q166_(3) = response) THEN
| Q166_compare := Q166_compare + str_replace(", ", "", preload_Q166_(3))
END OF IF

preload_Q166_total := '0'

IF Q166_compare != -1 THEN
| preload_Q166_total := number_format(Q166_compare)
END OF IF

Q148_compare := str_replace(", ", "", preload_Q148_)
Q345_compare := str_replace(", ", "", preload_Q345_)
Q331_compare := str_replace(", ", "", preload_Q331_)
Q317_compare := str_replace(", ", "", preload_Q317_)
Q357_compare := str_replace(", ", "", preload_Q357_)
Q371_compare := str_replace(", ", "", preload_Q371_)
Q376_compare := str_replace(", ", "", preload_Q376_)
Q467_compare := str_replace(", ", "", preload_Q467_)

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

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

```

```

END OF IF

IF Q166_compare = EMPTY OR lis_numeric(Q166_compare) THEN
| Q166_compare := -1
END OF IF

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

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

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

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

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

IF Q376_compare = EMPTY OR lis_numeric(Q376_compare) THEN
| Q376_compare := -1
END OF IF

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

```

```

A026_Rmarried := getHRSPreload(1, "A026_Rmarried")
A027_RPartnerd := getHRSPreload(1, "A027_RPartnerd")
A102_NumRInLaw := getHRSPreload(1, "A102_NumRInLaw")
A101_TotalKids := getHRSPreload(1, "A101_TotalKids")
A098_NumHHM := getHRSPreload(1, "A098_NumHHM")
FLCurrentYear := date("Y")

```

```
X004AmoBorn(1) := getHRSPreload(1, "X004AmoBorn(1)")
X005AdaBorn(1) := getHRSPreload(1, "X005AdaBorn(1)")
X067AYrBorn := getHRSPreload(1, "X067AYrBorn", 2)
```

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

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

```
ELSE
```

```
  IF X067AYrBorn(1) = EMPTY THEN
```

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

```
  ELSE
```

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

```
  END OF IF
```

```
END OF IF
```

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

```
IF personcounter = EMPTY THEN
```

```
  personcounter := 52
```

```
END OF IF
```

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

```
IF personcounter1 = EMPTY THEN
```

```
  personcounter1 := 72
```

```
END OF IF
```

```
J021 := getHRSPreload(3,"J021")
J478 := getHRSPreload(3,"J478")
FLCurrentMonth := date("n")
InitA061TLCY_A := FLCurrentYear - 1
```

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

**intro2** (Section PreloadQ)

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

X060ASex := getHRSPreload(1, "X060ASex", 2)  
X056AResStat := getHRSPreload(1, "X056AResStat", 2)  
X061ARelateR := getHRSPreload(1, "X061ARelateR", 2)  
E046\_NumGKids := getHRSPreload(2,"E046\_NumGKids")  
H004\_OwnRent := getHRSPreload(2,"H004\_OwnRent")  
H008\_OwnFarm := getHRSPreload(2,"H008\_OwnFarm")  
H011\_OwnFarmLand := getHRSPreload(2,"H011\_OwnFarmLand")  
H014\_OwnMobile := getHRSPreload(2,"H014\_OwnMobile")  
H151\_Own2ndHome := getHRSPreload(2,"H151\_Own2ndHome")  
Fill code of question FLTwoYears 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 := getHRSPreloadWave4(5, "X041")
x042 := getHRSPreloadWave4(5, "X042")
x043 := getHRSPreloadWave4(5, "X043")
x044 := getHRSPreloadWave4(5, "X044")
x045 := getHRSPreloadWave4(5, "X045")
x046 := getHRSPreloadWave4(5, "X046")
x047 := getHRSPreloadWave4(5, "X047")
x048 := getHRSPreloadWave4(5, "X048")
x049 := getHRSPreloadWave4(5, "X049")
x050 := getHRSPreloadWave4(5, "X050")
x052 := getHRSPreloadWave4(5, "X052")
x051 := getHRSPreloadWave4(5, "X051")
x516 := getHRSPreloadWave4(5, "X516")
x517 := getHRSPreloadWave4(5, "X517")
x518 := getHRSPreloadWave4(5, "X518")
x519 := getHRSPreloadWave4(5, "X519")
x520 := getHRSPreloadWave4(5, "X520")
```

ELSE

IF x041 = EMPTY THEN

```
x041 := mt_rand(1,3)
x042 := mt_rand(1,3)
x043 := mt_rand(1,3)
```

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

END OF IF

END OF IF

End of section **Randomizers**

End of section **PreloadQ**

Start of section **SectionQ**

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

IF A019\_RAge > 64 OR A044TSpAge\_A > 64 THEN

**Q010\_** (R OR SP WORK FOR PAY - LCY in section SectionQ)

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

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

1 Yes

5 No

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?
1 Me only
2 My (husband/wife/partner/spouse) only
3 Both of us
ELSE
| Q011_ := 1
END OF IF
ELSE
| BP085cases := 1
END OF IF
ELSE
Q012_ (R WORKED FOR PAY - LCY in section SectionQ)
We are interested in how people are getting along financially these days. The next questions are about income you( or your ^FLHWP/) receive. Some of these questions may seem similar to what we have already asked, however we would like to gather more detail.

Let's start with income from work.

Did you do any work for pay last year (that is, in (LAST CALENDAR YEAR()))?
1 Yes
5 No

IF X065ACouplenss(1) IN (1,2,3,4) THEN
| Q013_ (SP WORKED FOR PAY - LCY in section SectionQ)
| Did your (^FLHWP) do any work for pay last year, in (LAST CALENDAR YEAR())?
| 1 Yes
| 5 No
| END OF IF
END OF IF

IF BP085cases != 1 THEN
| IF Q011_ IN (1,3) OR Q012_ = 1 THEN
| Fill code of question FLQ014B executed
| Fill code of question FLQ014C executed

| Q014_ (R INCOME FROM WORK SELF EMPL - LCY in section SectionQ)
| (First we will ask about your earnings from work, and then about your ^FLQ014A.

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

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

```

1 Yes  
5 No

**IF Q014\_ = 1 THEN**

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

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

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

RANGE 0..1000000

**IF Q015\_ = EMPTY THEN**

**IF X041 = 1 THEN**

Q016\_Unf\_Random := 3

**ELSEIF X041 = 2 THEN**

Q016\_Unf\_Random := 5

**ELSE**

Q016\_Unf\_Random := 6

**END OF IF**

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

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

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

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

**END OF IF**

**END OF IF**

Fill code of question FLQ019 executed

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

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

1 Yes

5 No

**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
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?)  
 1 Yes  
 5 No

```

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
END OF IF

```

**Q026\_Unf** (Unfolding in section SectionQ)

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

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

Q026\_Unf\_Results := explode('~', Q026\_Unf)

END OF IF

END OF IF

**Q029\_** (R INCOME FROM TIP BONUS COMMISSION - LCY in section SectionQ)

Did any of your (LAST CALENDAR YEAR()) income come from tips, bonuses, commissions, etc?

1 Yes

5 No

IF Q029\_ = 1 THEN

**Q030\_** (R AMOUNT FROM TIP BONUS COMMISSION LCY in section SectionQ)

About how much did your (LAST CALENDAR YEAR()) income from tips, bonuses, commissions, etc. amount to, before taxes and other deductions?

RANGE 0..99999996

IF Q030\_ = EMPTY THEN

IF X506 = 1 THEN

Q031\_Unf\_Random := 5

ELSE

Q031\_Unf\_Random := 6

END OF IF

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

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

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

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

END OF IF

END OF IF

**Q034\_** (R OTHER INCOME FROM WORK 2ND JOB - LCY in section SectionQ)

In (LAST CALENDAR YEAR()), did you receive any other income from work, such as a second job or the military reserves?

1 Yes

5 No

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?

1 Yes

5 No

**IF Q039\_ = 1 THEN**

**Q040\_** (SP AMOUNT FROM SELF EMPL INCOME LCY in section SectionQ)  
What was your ((husband/wife/partner/spouse)'s) income from self-employment, before taxes and other deductions, in (LAST CALENDAR YEAR())?

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

RANGE 0..1000000

**IF Q040\_ = EMPTY THEN**

```
IF X516 = 1 THEN
| Q041_Unf_Random := 3
ELSEIF X516 = 1 THEN
| Q041_Unf_Random := 5
ELSE
| Q041_Unf_Random := 6
END OF IF
```

**Q041\_Unf** (Unfolding in section SectionQ)  
Thinking about your (husband/wife/partner/spouse)'s self-employment income in (LAST CALENDAR YEAR()):

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

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

END OF IF

END OF IF

Fill code of question FLQ044 executed

**Q044\_** (SP WAGES AND SALARY INCOME - LCY in section SectionQ)  
(Apart from any self-employment income, did/Did) your (^FLHWP) have any income from wages and salaries last year, in (LAST CALENDAR YEAR())?

1 Yes

5 No

IF Q044\_ = 1 THEN

**Q045\_** (SP AMOUNT FROM WAGES AND SALARY LCY in section SectionQ)  
About how much did your (^FLHWP's) income from wages and salaries amount to in (LAST CALENDAR YEAR()), before taxes and other deductions?  
RANGE 0..1000000

IF Q045\_ = EMPTY THEN

```
IF X517 = 1 THEN
| Q046_Unf_Random := 3
ELSEIF X517 = 2 THEN
| Q046_Unf_Random := 5
ELSE
| Q046_Unf_Random := 6
END OF IF
```

**Q046\_Unf** (Unfolding in section SectionQ)  
Thinking about your (husband/wife/partner/spouse)'s income from wages and

salaries in (LAST CALENDAR YEAR()):

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

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

END OF IF

END OF IF

Fill code of question FLQ049 executed

**Q049\_** (SP INCOME FROM PROF PRAC TRADE - LCY in section SectionQ)  
(**Other than what you have already mentioned**, did any of your ^FLQ014A income in ^InitA061TLCY\_A come from a professional practice or trade?/Did any of your ^FLQ014A income in ^InitA061TLCY\_A come from a professional practice or trade?)

1 Yes

5 No

IF Q049\_ = 1 THEN

**Q050\_** (SP AMOUNT FROM PROF PRAC TRADE LCY in section SectionQ)  
About how much income did your (^FLHWP) receive in (LAST CALENDAR YEAR()) from a professional practice or trade, before taxes and other deductions?  
RANGE 0..1000000

IF Q050\_ = EMPTY THEN

IF X503 = 1 THEN

Q051\_Unf\_Random := 5

ELSE

Q051\_Unf\_Random := 6

END OF IF

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

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

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

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

END OF IF

END OF IF

**Q054\_** (SP INCOME FROM TIP BONUS COMMISS - LCY in section SectionQ)  
Did any of your (^FLHWP's) (LAST CALENDAR YEAR()) income come from tips, bonuses, commissions, etc?

1 Yes  
5 No

**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?

1 Yes

5 No

**IF Q059\_ = 1 THEN**

**Q060\_** (SP AMOUNT FROM WORK 2ND JOB LCY in section SectionQ)

How much did your (^FLHWP) receive from this work in (LAST CALENDAR YEAR()), before taxes and other deductions?

RANGE 0..1000000

**IF Q060\_ = EMPTY THEN**

**IF X505 = 1 THEN**

| Q061\_Unf\_Random := 5

**ELSE**

| Q061\_Unf\_Random := 6

END OF IF

**Q061\_Unf** (Unfolding in section SectionQ)

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

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

Q061\_Unf\_Results := explode("", Q061\_Unf)

END OF IF

END OF IF

END OF IF

**Q064\_** (R OR SP INCOME FROM UNEMPLOYMENT - LCY in section SectionQ)

Did you( or your ^FLHWP/) receive any income in (LAST CALENDAR YEAR()) from Unemployment Compensation?

1 Yes

5 No

IF Q064\_ = 1 THEN

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

**Q065\_** (WHO RECEIVED INC FROM UNEMPLOYMENT LCY in section SectionQ)

Who received that Unemployment Compensation?

1 Me only

2 My (husband/wife/partner/spouse) only

3 Both of us

ELSE

Q065\_ := 1

END OF IF

IF Q065\_ != 2 THEN

Fill code of question FLQ066 executed

**Q066\_** (R AMOUNT FROM UNEMPLOYMENT - LCY in section SectionQ)

(How much did you, yourself, receive from **Unemployment Compensation** in ^InitA061TLCY\_A, before taxes and other deductions?/How much did you receive from **Unemployment Compensation** in ^InitA061TLCY\_A before taxes and other deductions?)

RANGE 1..50000

IF Q066\_ = EMPTY THEN

IF X506 = 1 THEN

Q067\_Unf\_Random := 5

```

ELSE
| Q067_Unf_Random := 6
END OF IF

Fill code of question FLQ067 executed

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

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

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

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

IF Q065_ IN (2,3) THEN
Q070_ (SP AMOUNT FROM UNEMPLOYMENT - LCY in section SectionQ)
How much did your (^FLHWP) receive from Unemployment Compensation in (LAST
CALENDAR YEAR()), before taxes and other deductions?
RANGE 1..50000

IF Q070_ = EMPTY THEN
IF X507 = 1 THEN
| Q071_Unf_Random := 5
ELSE
| Q071_Unf_Random := 6
END OF IF

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

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

Q071_Unf_Results := explode("'", Q071_Unf)
END OF IF
END OF IF
END OF IF

```

IF Q010\_ = 1 OR Q012\_ = 1 OR Q013\_ = 1 THEN

**Q074\_** (R OR SP INCOME FROM WORKERS COMP - LCY in section SectionQ)  
Did you( or your ^FLHWP/) receive any income in (LAST CALENDAR YEAR()) from

**Workers' Compensation?**

1 Yes

5 No

IF Q074\_ = 1 THEN

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

**Q075\_** (WHO RECEIVED FROM WORKERS COMP LCY in section SectionQ)

Who received that Workers' Compensation?

1 Me only

2 My (husband/wife/partner/spouse) only

3 Both of us

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 receive from **Worker's Compensation** in ^InitA061TLCY\_A, before taxes and other deductions?)

RANGE 1..50000

IF Q076\_ = EMPTY THEN

IF X508 = 1 THEN

Q077\_Unf\_Random := 5

ELSE

Q077\_Unf\_Random := 6

END OF IF

Fill code of question FLQ077 executed

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

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

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

```

)Was it more, about, or less than...
Q077_Unf_Results := explode("'", Q077_Unf)
END OF IF
END OF IF

IF Q075_ IN (2,3) THEN
Q080_ (SP AMOUNT FROM WORKERS COMP LCY in section SectionQ)
How much did your (^FLHWP) receive from Worker's Compensation in (LAST
CALENDAR YEAR()), before taxes and other deductions?
RANGE 1..50000

IF Q080_ = EMPTY THEN
IF X509 = 1 THEN
Q081_Unf_Random := 5
ELSE
Q081_Unf_Random := 6
END OF IF

Q081_Unf (Unfolding in section SectionQ)
Thinking about the Workers' Compensation your (husband/wife/partner/spouse)
received in (LAST CALENDAR YEAR()):

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

Q081_Unf_Results := explode("'", Q081_Unf)
END OF IF
END OF IF
END OF IF
END OF IF

IF J478 = 1 THEN
Fill code of question FLQ085 executed

Q085_ (R AMOUNT OF SS INCOME - LAST MONTH in section SectionQ)
About the Social Security income that (you, yourself,/you/) receive, how much was that
Social Security check, or the amount deposited directly into an account, last month?

Please report the amount after any deductions.
RANGE 1..3000

IF Q085_ = EMPTY THEN

```

**IF X511 = 1 THEN**

| Q086\_Unf\_Random := 11

**ELSEIF X511 = 2 THEN**

| Q086\_Unf\_Random := 10

**ELSE**

| Q086\_Unf\_Random := 12

**END OF IF**

**Q086\_Unf** (Unfolding in section SectionQ)

Thinking about the Social Security income you received last month:

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

Q086\_Unf\_Results := explode("'", Q086\_Unf)

**END OF IF**

**IF Z125 != 1 THEN**

**Q089\_** (R YEAR STARTED TO RECEIVE SS BENEFITS in section SectionQ)

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

RANGE 1900..(CURRENT CALENDAR YEAR())

**IF Q089\_ > FLCurrentYear - 3 THEN**

**Q090\_** (R MONTH STARTED TO RECEIVE SS BENEFITS in section SectionQ)

What month was that?

1 January

2 February

3 March

4 April

5 May

6 June

7 July

8 August

9 September

10 October

11 November

12 December

**END OF IF**

**END OF IF**

**END OF IF**

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

| Fill code of question FLQ084 executed

**Q084\_** (SP SOCIAL SECURITY INCOME in section SectionQ)  
(In an earlier survey you indicated that you are currently receiving Social Security income.

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

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

1 Yes

5 No

**IF Q084\_ = 1 THEN**

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

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

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

Please report the amount after any deductions.

RANGE 1..3000

**IF Q091\_ = EMPTY THEN**

**IF X512 = 1 THEN**

| Q092\_Unf\_Random := 11

**ELSEIF X512 = 2 THEN**

| Q092\_Unf\_Random := 10

**ELSE**

| Q092\_Unf\_Random := 12

**END OF IF**

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

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

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

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

**END OF IF**

**IF Z126 != 1 THEN**

**Q095\_** (SP YEAR STARTED TO RECEIVE SS BENEFITS in section SectionQ)

In what year did your (^FLHWP) start to receive Social Security benefits?

RANGE 1900..(CURRENT CALENDAR YEAR())

**IF Q095\_ > (FLCurrentYear - 3) THEN**

**Q096\_** (SP MONTH STARTED TO RECEIVE SS BENEFITS in section SectionQ)

What month was that?

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

END OF IF

END OF IF

END OF IF

END OF IF

**Q105\_** (R OR SP INCOME FROM SSI - LAST MONTH in section SectionQ)

Did you( or your ^FLHWP/) receive any income last month from **Supplemental Security Income, also called SSI?**

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

- 1 Yes
- 5 No

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?

- 1 Me only
- 2 My (husband/wife/partner/spouse) only
- 3 Both of us

ELSE

Q106\_ := 1

END OF IF

Fill code of question FLQ107 executed

**Q107\_** (AMOUNT RECEIVED FROM SSI LAST MONTH in section SectionQ)

How much (did you and your ^FLQ013/did your ^FLQ013/did you) receive from SSI last

month?  
RANGE 1..1500

**IF Q107\_ = EMPTY THEN**

**IF X513 = 1 THEN**

| Q108\_Unf\_Random := 11

**ELSEIF X513 = 2 THEN**

| Q108\_Unf\_Random := 10

**ELSE**

| Q108\_Unf\_Random := 12

**END OF IF**

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

Thinking about the SSI Income received last month:

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

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

**END OF IF**

Fill code of question FLQ111 executed

**IF Z127 != 1 THEN**

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

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

RANGE 1900..(CURRENT CALENDAR YEAR())

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

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

What month was that?

1 January

2 February

3 March

4 April

5 May

6 June

7 July

8 August

9 September

10 October

11 November

12 December

**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 wel-  
fare programs.

1 Yes  
5 No

IF Q113\_ = 1 THEN

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

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

| Who received that welfare income?

| 1 Me only  
| 2 My (husband/wife/partner/spouse) only  
| 3 Both of us

| ELSE

| Q114\_ := 1

| END OF IF

Fill code of question FLQ115 executed

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

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

RANGE 1..50000

IF Q115\_ = EMPTY THEN

| IF X507 = 1 THEN

| Q116\_Unf\_Random := 5

| ELSE

| Q116\_Unf\_Random := 6

| END OF IF

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

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

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

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

| END OF IF  
END OF IF

**Q119\_** (R OR SP INC FR VETERAN BEN MILITARY PENS in section SectionQ)  
Are you( or your ^FLHWP/) currently receiving any income from veteran benefits or a military pension?  
1 Yes  
5 No

IF Q119\_ = 1 THEN

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

| **Q120\_** (WHO RECEIVES VET BEN MILITARY PENSION in section SectionQ)  
Who receives these veteran benefits or a military pension?  
1 Me only  
2 My (husband/wife/partner/spouse) only  
3 Both of us

| ELSE

| Q120\_ := 1

| END OF IF

IF Q120\_ IN (1,3) THEN

| Fill code of question FLQ121 executed

| **Q121\_** (R AMT FR VETERAN BENEFITS - LAST MONTH in section SectionQ)  
How much did (you, yourself,/you) receive last month from these veteran benefits or a military pension before taxes and other deductions?  
RANGE 100..5000

| IF Q121\_ = EMPTY THEN

| | IF Q122\_Unf\_Random = EMPTY THEN

| | Q122\_Unf\_Random := 11

| | END OF IF

| **Q122\_Unf** (Unfolding in section SectionQ)  
Thinking about your income from veteran benefits or a military pension last month:

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

| Q122\_Unf\_Results := explode("'", Q122\_Unf)

| END OF IF

| **Q125\_** (R YEAR STARTED VETERAN BENEFITS in section SectionQ)  
In what year did you start to receive these veteran benefits or a military pension?

RANGE 1900..(CURRENT CALENDAR YEAR())

**IF Q125\_ > FLCurrentYear - 3 THEN**

**Q126\_** (R MONTH STARTED VETERAN BENEFITS in section SectionQ)

What month was that?

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

**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 (husband/wife/partner/spouse) received last month:

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

Q128\_Unf\_Results := explode("", Q128\_Unf)

**END OF IF**

**Q131\_** (SP YEAR STARTED VETERAN BENEFITS in section SectionQ)

In what year did (he/she/your spouse/your partner) start to receive these veteran benefits or a military pension?

RANGE 1900..(CURRENT CALENDAR YEAR())

IF Q131\_ > FLCurrentYear - 3 THEN

**Q132\_** (SP MONTH STARTED VETERAN BENEFITS in section SectionQ)

What month was that?

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

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

**date\_warning** (Section SectionQ)

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

Please go back to review and correct your previous responses.

END OF IF

END OF IF

END OF IF

END OF IF

Fill code of question FLQ133 executed

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

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

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

Please do not include business or farm real estate.

- 1 Yes
- 5 No

IF Q133\_ = 1 THEN

```
q134_compare := str_replace(", ", "", q134_compare)
```

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

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

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

RANGE 5000..1500000

**q134\_diffwarning** (Section SectionQ)

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

**q134\_flag** (FLAG COMPARE REAL ESTATE ASSET AMOUNT in section PreloadQ)

NUMBER (NO DECIMALS ALLOWED)

#### END OF GROUP

```
IF Q134_ = EMPTY THEN
```

```
  IF X047 = 1 THEN
```

```
    Q135_Unf_Random := 3
```

```
  ELSEIF X047 = 2 THEN
```

```
    Q135_Unf_Random := 5
```

```
  ELSE
```

```
    Q135_Unf_Random := 6
```

```
  END OF IF
```

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

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

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

```
Q135_Unf_Results := explode("", Q135_Unf)
```

```
END OF IF
```

Fill code of question FLQ138 executed

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

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

1 Yes

5 No

IF Q138\_ = 1 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

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

How often do you receive that rental income?

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

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

STRING

END OF GROUP

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

Fill code of question FLQ141 executed

Fill code of question FLQ141\_2 executed

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

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

RANGE 0..99999996

IF Q141\_ != EMPTY THEN

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

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

- 1 Yes
- 5 No

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
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?  
1 Yes  
5 No

```
IF Q147_ = 1 THEN
```

```
q148_compare := str_replace(", ", "", q148_compare)
```

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

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

**q148\_diffwarning** (Section SectionQ)  
According to our records, the amount you entered differs greatly from your last survey in (January/February/March/April/May/June/July/August/September/October/November/December),  
(()): \$(PRELOADED BUSINESS OR FARM EQUITY AMOUNT()). Please review your

answer. If it is correct, select Next to continue. Otherwise please make the correction before continuing.

**q148\_flag** (FLAG COMPARE AMOUNT in section PreloadQ)  
NUMBER (NO DECIMALS ALLOWED)

#### END OF GROUP

**IF Q148\_ = EMPTY THEN**

**IF X049 = 1 THEN**

| Q149\_Unf\_Random := 3

**ELSEIF X049 = 2 THEN**

| Q149\_Unf\_Random := 5

**ELSE**

| Q149\_Unf\_Random := 6

**END OF IF**

**Q149\_Unf** (Unfolding in section SectionQ)

Thinking about how much you would get if you sold it and paid off any debts:

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

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

**END OF IF**

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

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

1 Yes

5 No

**IF Q152\_ = 1 THEN**

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

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

How often do you receive that business or farm income?

1 Weekly

2 Twice per month

3 Monthly

4 Quarterly

5 Every 6 months

6 Yearly

7 Other, please specify:

**Q154S** (INCOME FROM FARM OR BUSINESS FREQUENCY- -OTHER in 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 income did you receive (last week/last month/last quarter/last time)  
from that business or farm, before taxes and other deductions?  
RANGE 0..99999996

**IF Q155\_ = RESPONSE THEN**

**Q156\_** (BUSINESS OR FARM INC SAME AMT PER PERIOD in section SectionQ)  
Do you get about the same amount of business or farm income each  
(week/month/quarter/time)?  
1 Yes  
5 No

**END OF IF**

**END OF IF**

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

**Q157\_** (BUSINESS OR FARM INCOME AMOUNT - LCY in section SectionQ)  
About how much income did you( and your ^FLHWP) receive from any farms or  
businesses in (LAST CALENDAR YEAR()), before taxes and other deductions?  
RANGE 2500..400000

**IF Q157\_ = EMPTY THEN**

**IF X510 = 1 THEN**  
| Q158\_Unf\_Random := 6  
**ELSE**  
| Q158\_Unf\_Random := 5  
**END OF IF**

**Q158\_Unf** (Unfolding in section SectionQ)  
Thinking about your income from any farms or businesses in (LAST CALENDAR  
YEAR()):

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

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

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

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

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

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

1 Yes

5 No

```
IF Q162_ = 1 THEN
```

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

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

1 One

2 Two

3 Three

4 More than 3

```
IF Q163_ = 1 OR Q163_ = EMPTY THEN
```

```
| IRAtot := 1
```

```
ELSEIF Q163_ = 2 THEN
```

```
| IRAtot := 2
```

```
ELSE
```

```
| IRAtot := 3
```

```
END OF IF
```

```
Q166_total := '0'
```

```
LOOP FROM 1 TO IRATOT
```

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

```
Fill code of question FLQ165Q1 executed
```

```
Fill code of question FLQ165Q2 executed
```

```
Fill code of question FLQ165A executed
```

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

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

^FLQ014A?)  
1 My account  
2 (My (husband/wife/partner/spouse)'s account)  
3 (My (husband/wife/partner/spouse)'s and my accounts)

ELSE

| Q165\_(IRAcnt) := 1

END OF IF

Fill code of question FLQ166Q1 executed  
Fill code of question FLQ166Q2 executed

**Q166\_** (AMOUNT IN IRA ACCOUNT in section SectionQ)  
(Thinking about the largest **IRA or KEOGH account**, /Thinking about the other **IRA or KEOGH account**, /Thinking about the next largest **IRA or KEOGH account**, /Thinking about the third **IRA or KEOGH account**, /Thinking about all the other **IRA or KEOGH accounts**, /Thinking about all the **IRA or KEOGH account**, /Thinking about the **IRA or KEOGH account**, /)(about how much in total is in these other IRA or KEOGH accounts/about how much in total is in these IRA or KEOGH accounts/about how much is in this account/About how much in total is in these other IRA or KEOGH accounts/About how much in total is in these IRA or KEOGH accounts/About how much is in this account) at the present time?  
RANGE 5000..250000

IF Q166\_(IRAcnt) = EMPTY THEN

| IF X043 = 1 THEN

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

| ELSEIF X043 = 2 THEN

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

| ELSE

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

| END OF IF

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

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

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

ELSE

Q166\_total := Q166\_total + str\_replace(", ", "", Q166\_(IRAcnt))

END OF IF

Fill code of question FLQ537 executed

**Q537\_** (Rollover from a job-related pension plan in section SectionQ)

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

1 Yes

5 No

IF Q537\_(IRAcnt) = 1 THEN

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

**Q538\_** (All Rollover from a job-related pension plan in section SectionQ)

Did all of the money in this IRA or KEOGH account come from a rollover from a job-related pension plan?

1 Yes

5 No

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?

1 Yes

5 No

IF Q513\_(IRAcnt) = 1 THEN

**Q514\_** (IRA - PERCENT IN STOCK OR MUTUAL FUND in section SectionQ)

About what percent is invested in stocks or mutual funds?

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

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

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

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

- 1 Less than 50 percent
- 3 About 50 percent
- 5 More than 50 percent

**END OF IF**

**END OF IF**

Fill code of question FLQ170 executed

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

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

- 1 Yes
- 5 No

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

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

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

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

RANGE 0..99999996

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

Per:

- 1 In total
- 3 Month
- 4 Quarter
- 5 6 month
- 6 Year
- 7 Other, please specify:

**Q176S** (AMT WITHDR FR IRA ACCOUNT - SPECIFY in section SectionQ)

You selected an interval of 'Other'. Please specify.

```

| STRING
| END OF GROUP
| IF Q171_(IRAcnt) = EMPTY THEN
|   IF X501 = 1 THEN
|     Q172_Unf_Random(IRAcnt) := 5
|   ELSE
|     Q172_Unf_Random(IRAcnt) := 6
|   END OF IF
|
| Fill code of question FLQ172A executed
| Fill code of question FLQ172B executed
|
| Q172_Unf (Unfolding in section SectionQ)
| Thinking about the money you( or your ^FLHWP/) withdrew from (this IRA or
| KEOGH account/these IRA or KEOGH accounts) (since ^Z092, ^Z093/in the last
| two years):
|
| Was it more, about, or less than...
|
| Q172_Unf_Results(IRAcnt) := explode('~', Q172_Unf(IRAcnt))
|
| END OF IF
|
| Q177_ (IRA MONEY MINIMUM WITHDRAWAL in section SectionQ)
| Did you( or your ^FLHWP/) take out only the 'minimum withdrawal option', that is, the
| amount required to avoid a tax penalty?
| 1 Yes
| 5 No
|
| END OF IF
|
| END OF LOOP
| END OF IF

Q182_ (CASH OR CONVERT OTHER IRA-KEOGH in section SectionQ)
Did you( or your ^FLHWP/) cash in or convert any IRA or KEOGH accounts to annuities at
any time (in the last two years/since ^z092, ^z093)?
1 Yes

```

5 No

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?

- 1 My account
- 2 My (husband/wife/partner/spouse)'s account
- 3 Both

ELSE

Q183\_ := 1

END OF IF

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

Q184M (IRA-KEOGH CASHED OR CONVERTED in section SectionQ)

Did you( or your ^FLHWP/) cash in these IRA or KEOGH accounts, convert them to annuities, or what? Please choose all that apply.

- 1 Cashed in account
- 2 Converted to annuity
- 7 Other, please specify:

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

STRING

END OF GROUP

IF 2 IN Q184M THEN

Q186\_ (AMOUNT CONVERTED TO ANNUITIES in section SectionQ)

About how much money in IRA or KEOGH accounts was converted to annuities?

RANGE 0..99999996

IF Q186\_ = EMPTY THEN

IF X502 = 1 THEN

Q187\_Unf\_Random := 5

ELSE

Q187\_Unf\_Random := 6

END OF IF

Q187\_Unf (Unfolding in section SectionQ)

Thinking about the money converted to annuities:

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

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

END OF IF

### GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

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

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

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

RANGE 0..99999996

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

Per:

3 Month

4 Quarter

5 6 Month

6 Year

7 Other, please specify:

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

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

STRING

### END OF GROUP

IF Q190\_ = EMPTY THEN

IF X503 = 1 THEN

| Q191\_Unf\_Random := 5

ELSE

| Q191\_Unf\_Random := 6

END OF IF

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

Thinking about the money received from this annuity:

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

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

END OF IF

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

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

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

- 1 Yes
- 5 No

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

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

RANGE 1900..(CURRENT CALENDAR YEAR())

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

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

What month was that?

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

**END OF IF**

Fill code of question FLQ202A executed

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

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

For how long will these annuity payments continue?

Please select one of the following:

- 2 For a fixed period:
- 3 ()
- 4 As long as I live
- 5 ()
- 6 Until the money runs out
- 7 Other, please specify:

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

RANGE 0..96

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

END OF GROUP

END OF IF

END OF IF

IF 1 IN Q184M THEN

**Q204\_** (AMT WITHDRAWN FROM OTHER IRA in section SectionQ)  
About how much money was withdrawn or cashed in from these IRA or KEOGH accounts?  
RANGE 0..99999996

IF Q204\_ = EMPTY THEN

IF Q205\_Unf\_Random = EMPTY THEN

Q205\_Unf\_Random := 11

END OF IF

**Q205\_Unf** (Unfolding in section SectionQ)  
Thinking about the money from any IRA or KEOGH accounts you cashed in:

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

Q205\_Unf\_Results := explode("", Q205\_Unf)

END OF IF

END OF IF

END OF IF

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

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.

1 Yes

5 No

IF Q215\_ = 1 THEN

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

**Q216\_** (WHO REC PENSION RETIREMENT INC in section SectionQ)  
Who receives that income from retirement pensions?

1 Me only

```

| 2 My (husband/wife/partner/spouse) only
| 3 Both of us
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?
1 Yes
5 No

IF Q217_ = 1 THEN
| Q218_ (NUMBER OF PENSIONS R RECEIVED in section SectionQ)
| How many retirement pensions do you receive? Please enter zero if none.
| RANGE 0..50
ELSE
| Q218_ := 1
END OF IF

IF Q218_ > 0 THEN
| IF Q218_ = 1 THEN
| | PENTot := 1
| ELSE
| | PENTot := 2
| END OF IF

LOOP FROM 1 TO PENTOT
| Fill code of question FLQ220 executed

| IF PENcnt = 1 THEN
| | Q220_maximum := 10000
| ELSE
| | IF Q220_(1) = RESPONSE THEN

```

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

ELSE

| Q220\_maximum := 10000

END OF IF

END OF IF

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

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

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

IF Q220\_(PENcnt) = EMPTY THEN

| IF X504 = 1 THEN

| Q221\_Unf\_Random(PENcnt) := 5

ELSE

| Q221\_Unf\_Random(PENcnt) := 6

END OF IF

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

Thinking about the income from that pension last month:

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

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

END OF IF

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

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

1 Yes

5 No

**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?

1 Yes

5 No

**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?

1 Yes

5 No

**IF Q226\_(PENcnt) = 1 THEN**

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

About how much is in this pension account?

RANGE 0..99999996

**IF Q227\_(PENcnt) = EMPTY THEN**

**IF X515 = 1 THEN**

Q228\_Unf\_Random(PENcnt) := 11

**ELSEIF X515 = 2 THEN**

Q228\_Unf\_Random(PENcnt) := 10

**ELSE**

Q228\_Unf\_Random(PENcnt) := 12

**END OF IF**

**Q228\_Unf** (Unfolding in section SectionQ)

Thinking about the money in this pension account:

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

Q228\_Unf\_Results(PENcnt) := explode("'", Q228\_Unf(PENcnt))

**END OF IF**

END OF IF

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

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

RANGE 1900..(CURRENT CALENDAR YEAR())

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

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

What month was that?

1 January

2 February

3 March

4 April

5 May

6 June

7 July

8 August

9 September

10 October

11 November

12 December

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?

1 Yes

5 No

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

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

1 Yes

5 No

IF Q234\_(PENcnt) = 5 THEN

**Q235\_** (R HOW LONG PENSION PMT CONTINUE in section SectionQ)

For how many years will it continue?

NUMBER (NO DECIMALS ALLOWED)

END OF IF

Fill code of question FLQ236 executed

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

**Q236\_** (R PENSION CHANGE AT DEATH in section SectionQ)

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

- 1 Stop
- 2 Continue unchanged
- 3 Continue at reduced level
- 7 Other, please specify:

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

STRING

**END OF GROUP**

**END OF LOOP**

**IF Q218\_ > 2 THEN**

**Q238\_** (AMOUNT RECEIVED OTHER PENSIONS LAST MO in section SectionQ)

About the other retirement pensions that you receive, please indicate about how much in total you received last month, before taxes and other deductions?

RANGE 250..10000

**IF Q238\_ = EMPTY THEN**

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

Q239\_Unf\_Random := 11

**END OF IF**

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

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

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

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

**END OF IF**

**Q242\_** (TAXES W/HELD OTR PENSIONS in section SectionQ)

Were any federal income taxes withheld on these other retirement pensions that you receive?

- 1 Yes
- 5 No

**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?
```

```
1 Yes
```

```
5 No
```

```
IF Q243_ = 1 THEN
```

```
| Q244_ (SP NUMBER OF PENSIONS in section SectionQ)
```

```
How many such pensions does your (husband/wife/partner/spouse) receive?
```

```
RANGE 0..20
```

```
ELSE
```

```
| Q244_ := 1
```

```
END OF IF
```

```
IF Q244_ > 0 THEN
```

```
| IF Q244_ = 1 THEN
```

```
| | PENtotSP := 1
```

```
ELSE
```

```
| | PENtotSP := 2
```

```
END OF IF
```

```
LOOP FROM 1 TO PENTOTSP
```

```
| Fill code of question FLQ246 executed
```

```
IF PENcnt = 1 THEN
```

```
| Q246_maximum := 10000
```

```
ELSE
```

```
| IF Q246_(1) = RESPONSE THEN
```

```
| | Q246_maximum := str_replace(","," ",Q246_(1))
```

ELSE

| Q246\_maximum := 10000

END OF IF

END OF IF

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

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

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

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

IF Q246\_(PENcnt) = EMPTY THEN

| IF X505 = 1 THEN

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

ELSE

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

END OF IF

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

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

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

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

END OF IF

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

Were any federal income taxes withheld on that income from your (husband/wife/partner/spouse)'s retirement pension?

1 Yes

5 No

**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?

1 Yes

5 No

**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?

1 Yes

5 No

**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?

RANGE 1900..(CURRENT CALENDAR YEAR())

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

**Q258\_** (SP MONTH PENSION STARTED in section SectionQ)

What month was that?

1 January

2 February

3 March

4 April

5 May

6 June

7 July

8 August

9 September

10 October

11 November

12 December

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?

1 Yes

5 No

**Q260\_** (SP PENSION PAYMENT CONTINUE FOR LIFE in section SectionQ)

Will this payment from your (husband/wife/partner/spouse)'s retirement pension continue for as long as (he/she/your spouse/your partner) lives?

1 Yes

5 No

IF Q260\_(PENcnt) = 5 THEN

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

**END OF IF**

Fill code of question FLQ262 executed

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

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

- 1 Stop
- 2 Continue unchanged
- 3 Continue at reduced level
- 7 Other, please specify:

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

**END OF GROUP**

**END OF LOOP**

**END OF IF**

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

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

**IF Q264\_ = EMPTY THEN**

**IF Q265\_Unf\_Random = EMPTY THEN**

Q265\_Unf\_Random := 11

**END OF IF**

**Q265\_Unf** (Unfolding in section SectionQ)  
Thinking about (his/her/your spouse's/your partner's) income from any other retirement 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?

1 Yes

5 No

END OF IF

END OF IF

IF Q216\_ = EMPTY THEN

**Q269\_** (AMOUNT R-SP PENSION RECD LAST MONTH in section SectionQ)

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

RANGE 0..99999996

IF Q269\_ = EMPTY THEN

IF X517 = 1 THEN

Q270\_Unf\_Random := 11

ELSEIF X517 = 2 THEN

Q270\_Unf\_Random := 10

ELSE

Q270\_Unf\_Random := 12

END OF IF

**Q270\_Unf** (Unfolding in section SectionQ)

Thinking about the total income you( and your ^FLHWP) received from retirement pensions last month:

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

Q270\_Unf\_Results := explode('~', Q270\_Unf)

END OF IF

END OF IF

END OF IF

**Q273\_** (R OR SP INCOME FROM ANNUITIES in section SectionQ)

Are you( or your ^FLHWP/) currently receiving any income from annuities?

1 Yes

5 No

IF Q273\_ = 1 THEN

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

Q274\_ (WHO RECEIVED INC FROM ANNUITIES in section SectionQ)

Who receives that income from annuities?

1 Me only

2 My (husband/wife/partner/spouse) only

3 Both of us

ELSE

Q274\_ := 1

END OF IF

IF Q274\_ IN (1,3) THEN

Fill code of question FLQ275 executed

Q275\_ (R INCOME FROM MORE THAN ONE ANNUITY in section SectionQ)

(First we will ask about your annuity payments, then about your ^FLQ014A.

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

1 Yes

5 No

IF Q275\_ = 1 THEN

Q276\_ (R NUMBER OF ANNUITIES INCOME in section SectionQ)

How many annuities do you receive?

RANGE 1..50

ELSE

Q276\_ := 1

END OF IF

IF Q276\_ = 1 THEN

ANNtot := 1

ELSE

ANNtot := 2

END OF IF

LOOP FROM 1 TO ANNTOT

Fill code of question FLQ278 executed

IF ANNcnt = 1 THEN

| Q278\_maximum := 10000

ELSE

| IF Q278\_(1) = RESPONSE THEN

| Q278\_maximum := str\_replace(",","",Q278\_(1))

ELSE

| Q278\_maximum := 10000

END OF IF

END OF IF

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

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

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

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

IF Q278\_(ANNcnt) = EMPTY THEN

| IF X506 = 1 THEN

| Q279\_Unf\_Random(ANNcnt) := 5

ELSE

| Q279\_Unf\_Random(ANNcnt) := 6

END OF IF

**Q279\_Unf** (Unfolding in section SectionQ)  
Thinking about the income from that annuity last month:

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

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

ELSEIF Q278\_(ANNcnt) = 0 THEN

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

Did you get any income from this annuity last year?

1 Yes

5 No

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?

1 Yes

5 No

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

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

RANGE 1900..(CURRENT CALENDAR YEAR())

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

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

What month was that?

1 January

2 February

3 March

4 April

5 May

6 June

7 July

8 August

9 September

10 October  
11 November  
12 December

**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?  
1 Yes  
5 No

**Q286\_** (R ANNUITY PMT CONTINUE FOR LIFE in section SectionQ)  
Will this payment from your annuity continue for as long as you live?  
1 Yes  
5 No

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

**Q287\_** (R HOW LONG ANNUITY PMT CONTINUE in section SectionQ)  
For how many years will it continue?  
RANGE 0..100

**END OF IF**

Fill code of question FLQ288 executed

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

**Q288\_** (R ANNUITY PMT CHANGE AT DEATH in section SectionQ)  
If you were to die( before then,/,) would the payment from your annuity stop, continue unchanged, or continue at a reduced level?  
1 Stop  
2 Continue unchanged  
3 Continue at a reduced level  
7 Other, please specify:

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

**END OF GROUP**

**END OF IF**

END OF LOOP

IF Q276\_ > 2 THEN

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

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

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

RANGE 250..20000

IF Q290\_ = EMPTY THEN

IF Q291\_Unf\_Random = EMPTY THEN

Q291\_Unf\_Random := 11

END OF IF

**Q291\_Unf** (Unfolding in section SectionQ)

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

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

Q291\_Unf\_Results := explode("'", Q291\_Unf)

ELSEIF Q290\_ = 0 THEN

**Q526\_** (R INCOME FROM OTHER ANNUITY - LAST YEAR in section SectionQ)

Did you get any income from these annuities last year?

1 Yes

5 No

IF Q526\_ = 1 THEN

**Q527\_** (R AMOUNT FROM OTHER ANNUITY - LAST YEAR in section SectionQ)

How much in total did you receive from these annuities last year before taxes and other deductions?

RANGE 0..99999996

END OF IF

END OF IF

IF Q290\_ > 0 OR Q290\_ = EMPTY OR (Q290\_ = 0 AND Q526\_ = 1) THEN

**Q294\_** (R TAX W/HELD OTR ANNUITIES in section SectionQ)

Were any federal income taxes withheld on these annuities?

1 Yes

5 No

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 (husband/wife/partner/spouse).

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

1 Yes

5 No

IF Q295\_ = 1 THEN

Q296\_ (NUMBER OF ANNUITIES SP in section SectionQ)

How many such annuity payments does your (^FLHWP) receive?

RANGE 0..20

ELSE

Q296\_ := 1

END OF IF

IF Q296\_ = 1 THEN

ANNtotSP := 1

ELSE

ANNtotSP := 2

END OF IF

IF Q296\_ > 0 THEN

LOOP FROM 1 TO ANNTOTSP

Fill code of question FLQ298 executed

IF ANNcnt = 1 THEN

Q298\_maximum := 10000

ELSE

IF Q298\_(1) = RESPONSE THEN

Q298\_maximum := str\_replace(",",";",Q298\_(1))

ELSE

| Q298\_maximum := 10000

| END OF IF

END OF IF

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

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

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

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

IF Q298\_(ANNcnt) = EMPTY THEN

| IF X507 = 1 THEN

| Q299\_Unf\_Random(ANNcnt) := 5

| ELSE

| Q299\_Unf\_Random(ANNcnt) := 6

| END OF IF

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

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

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

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

ELSEIF Q298\_(ANNcnt) = 0 THEN

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

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

1 Yes

5 No

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?  
1 Yes  
5 No

**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?  
RANGE 1900..(CURRENT CALENDAR YEAR())

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

**Q304\_** (SP MONTH ANNUITY PMT STARTED in section SectionQ)  
What month was that?  
1 January  
2 February  
3 March  
4 April  
5 May  
6 June  
7 July  
8 August  
9 September  
10 October  
11 November  
12 December

END OF IF

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

the cost of living?

1 Yes

5 No

**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?

1 Yes

5 No

**IF Q306\_(ANNcnt) = 5 THEN**

**Q307\_** (SP HOW LONG ANNUITY PMT CONTINUE in section SectionQ)

For how many years will it continue?

NUMBER (NO DECIMALS ALLOWED)

**END OF IF**

Fill code of question FLQ308 executed

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

**Q308\_** (SP ANNUITY PMT CHANGE AT DEATH in section SectionQ)

If (he/she/your spouse/your partner) were to die( before then,/,) would the payment from your (^FLHWP)'s annuity stop, continue unchanged, or continue at a reduced level?

1 Stop

2 Continue unchanged

3 Continue at a reduced level

7 Other, please specify:

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

STRING

**END OF GROUP**

**END OF IF**

**END OF LOOP**

**END OF IF**

**IF Q296\_ > 2 THEN**

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

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

before taxes and other deductions?

Please enter zero if annuity payments have not started yet or (he/she/your spouse/your partner) did not receive a payment last month.  
RANGE 250..20000

**IF Q310\_ = EMPTY THEN**

**IF Q498\_Unf\_Random = EMPTY THEN**

Q498\_Unf\_Random := 11

**END OF IF**

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

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

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

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

**ELSEIF Q310\_ = 0 THEN**

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

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

1 Yes

5 No

**IF Q530\_ = 1 THEN**

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

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

RANGE 0..99999996

**END OF IF**

**END OF IF**

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

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

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

1 Yes

5 No

**END OF IF**

**END OF IF**

**END OF IF**

**IF Q274\_ = EMPTY THEN**

**Q312\_** (R-SP TOTAL MONTHLY ANNUITY INCOME in section SectionQ)  
Overall, about how much income did you( and your ^FLHWP) receive last month from annuity payments, not including Social Security?

RANGE 0..99999996

END OF IF

END OF IF

Fill code of question FLQ316 executed

**Q316\_** (STOCK AND STOCK MUTUAL FUNDS in section SectionQ)  
(The next questions are about your assets, including those held by you and your ^FLHWP jointly, by you only, or by your ^FLHWP only.

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

1 Yes

5 No

IF Q316\_ = 1 THEN

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

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**Q317\_** (STOCKS TOTAL VALUE in section SectionQ)  
If you( or your ^FLHWP/) sold all those stocks and stock mutual funds and paid off anything you owed on them, about how much would you have?  
RANGE 1000..2000000

**q317\_diffwarning** (Section SectionQ)  
According to our records, the amount you entered differs greatly from your last survey in (January/February/March/April/May/June/July/August/September/October/November/December), (()): \$(PRELOADED STOCKS TOTAL VALUE()). Please review your answer. If it is correct, select Next to continue. Otherwise please make the correction before continuing.

**q317\_flag** (FLAG COMPARE AMOUNT in section PreloadQ)  
NUMBER (NO DECIMALS ALLOWED)

END OF GROUP

IF Q317\_ = EMPTY THEN

IF X044 = 1 THEN

```
| Q318_Unf_Random := 3
ELSEIF X044 = 2 THEN
| Q318_Unf_Random := 5
ELSE
| Q318_Unf_Random := 6
END OF IF
```

**Q318\_Unf** (Unfolding in section SectionQ)  
Thinking about the value of those stocks or stock mutual funds:

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

```
Q318_Unf_Results := explode("'", Q318_Unf)
```

END OF IF

**Q321\_** (STOCK INCOME in section SectionQ)  
Do these stocks or mutual funds pay any dividends or interest?  
1 Yes  
5 No

IF Q321\_ = 1 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**Q322\_** (STOCK INCOME HOW OFTEN in section SectionQ)  
How often are these dividends and interest (from stocks and stock mutual funds) paid?

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

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

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

END OF GROUP

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

**Q324\_** (STOCK INCOME AMOUNT LAST PERIOD in section SectionQ)  
About how much did you( or your ^FLHWP/) receive in your last dividends or interest payment from these stocks and stock mutual funds, before taxes and other deduc-

tions?  
RANGE 0..99999996

**IF Q324\_ != EMPTY THEN**

**Q325\_** (STOCK INCOME AMOUNT SAME PER PERIOD in section SectionQ)  
Do you( or your ^FLHWP/) get about the same amount of dividends and interest  
(from stocks and stock mutual funds) each payment?  
1 Yes  
5 No

**END OF IF**

**END OF IF**

**IF Q322\_ IN (1,6,7) OR Q322\_ = EMPTY OR (Q322\_ IN (3,4,5) AND Q324\_ =  
EMPTY) OR (Q322\_ IN (3,4,5) AND Q324\_ != EMPTY AND Q325\_ != 1) THEN**

**Q326\_** (STOCK INCOME AMOUNT - LCY in section SectionQ)  
About how much dividends and interest did you( or your ^FLHWP/) receive from these  
stocks or stock mutual funds in (LAST CALENDAR YEAR()), before taxes and other  
deductions? Please do not include any stocks or mutual funds in a pension plan.  
RANGE 250..1000000

**IF Q326\_ = EMPTY THEN**

**IF X518 = 1 THEN**  
| Q327\_Unf\_Random := 11  
**ELSEIF X518 = 2 THEN**  
| Q327\_Unf\_Random := 10  
**ELSE**  
| Q327\_Unf\_Random := 12  
**END OF IF**

**Q327\_Unf** (Unfolding in section SectionQ)  
Thinking about what was received from stocks or stock mutual funds in (LAST  
CALENDAR YEAR()):

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

Q327\_Unf\_Results := explode("'", Q327\_Unf)

**END OF IF**

**END OF IF**

**END OF IF**

**END OF IF**

**Q330\_** (BOND ASSETS in section SectionQ)  
Do you( or your ^FLHWP/) have any corporate, municipal, government or foreign bonds, or

bond funds? Do not count government savings bonds or Treasury bills.

Please **exclude** any corporate, municipal, government or foreign bonds, or bond funds **that you have in employer pension plans or retirement accounts.**

1 Yes

5 No

**IF Q330\_ = 1 THEN**

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

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

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

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

RANGE 1000..1500000

**q331\_diffwarning** (Section SectionQ)

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

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

NUMBER (NO DECIMALS ALLOWED)

**END OF GROUP**

**IF Q331\_ = EMPTY THEN**

**IF X045 = 1 THEN**

| Q332\_Unf\_Random := 3

**ELSEIF X045 = 2 THEN**

| Q332\_Unf\_Random := 5

**ELSE**

| Q332\_Unf\_Random := 6

**END OF IF**

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

Thinking about the value of those bonds or bond funds:

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

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

END OF IF

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

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

1 Yes

5 No

IF Q335\_ = 1 THEN

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

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

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

1 It accumulates or is reinvested

3 Monthly

4 Quarterly

5 Every 6 months

6 Yearly

7 Other, please specify:

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

STRING

END OF GROUP

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

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

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

RANGE 0..99999996

IF Q338\_ != EMPTY THEN

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

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

1 Yes

5 No

END OF IF

END OF IF

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

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

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

RANGE 250..1000000

IF Q340\_ = EMPTY THEN

IF X519 = 1 THEN

Q341\_Unf\_Random := 11

ELSEIF X519 = 2 THEN

Q341\_Unf\_Random := 10

ELSE

Q341\_Unf\_Random := 12

END OF IF

**Q341\_Unf** (Unfolding in section SectionQ)

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

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

Q341\_Unf\_Results := explode("", Q341\_Unf)

END OF IF

END OF IF

END OF IF

END OF IF

**Q344a** (CHECKING SAVINGS in section SectionQ)

Do you( or your ^FLHWP/) have any **checking** or **savings** accounts?

1 Yes

5 No

**Q344b** (MONEY MARKET FUNDS in section SectionQ)

Do you( or your ^FLHWP/) have any **money market funds**?

1 Yes

5 No

IF Q344a = 1 OR Q344b = 1 THEN

Q344\_ := 1

END OF IF

IF Q344\_ = 1 THEN

```
q345.compare := str_replace(", ", "", q345.compare)
```

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

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

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

RANGE 0..300000

**q345.diffwarning** (Section SectionQ)

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

**q345.flag** (FLAG COMPARE AMOUNT in section PreloadQ)

NUMBER (NO DECIMALS ALLOWED)

#### END OF GROUP

```
IF Q345_ = EMPTY THEN
```

```
  IF X046 = 1 THEN
```

```
    Q346_Unf_Random := 3
```

```
  ELSEIF X046 = 2 THEN
```

```
    Q346_Unf_Random := 5
```

```
  ELSE
```

```
    Q346_Unf_Random := 6
```

```
  END OF IF
```

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

Thinking about those accounts:

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

```
Q346_Unf_Results := explode("", Q346_Unf)
```

```
END OF IF
```

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

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

1 Yes

5 No

**IF Q349\_ = 1 THEN**

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

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

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

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

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

STRING

**END OF GROUP**

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

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

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

RANGE 0..99999996

**IF Q352\_ != EMPTY THEN**

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

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

- 1 Yes
- 5 No

**END OF IF**

**END OF IF**

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

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

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

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

RANGE 250..1000000

IF Q354\_ = EMPTY THEN

IF X520 = 1 THEN

Q494\_Unf\_Random := 11

ELSEIF X520 = 2 THEN

Q494\_Unf\_Random := 10

ELSE

Q494\_Unf\_Random := 12

END OF IF

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

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

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

Q494\_Unf\_Results := explode("'", Q494\_Unf)

END OF IF

END OF IF

END OF IF

END OF IF

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

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

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

1 Yes

5 No

IF Q356\_ = 1 THEN

q357\_compare := str\_replace(", ", "", q357\_compare)

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

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

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

RANGE 1000..1500000

**q357\_diffwarning** (Section SectionQ)

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

**q357\_flag** (FLAG COMPARE AMOUNT in section PreloadQ)  
NUMBER (NO DECIMALS ALLOWED)

#### END OF GROUP

**IF Q357\_ = EMPTY THEN**

**IF X048 = 1 THEN**

| Q358\_Unf\_Random := 3

**ELSEIF X048 = 2 THEN**

| Q358\_Unf\_Random := 5

**ELSE**

| Q358\_Unf\_Random := 6

**END OF IF**

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

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

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

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

**END OF IF**

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

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

1 Yes

5 No

**IF Q361\_ = 1 THEN**

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

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

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

1 It accumulates or is reinvested

3 Monthly

4 Quarterly

5 Every 6 months

6 Yearly  
7 Other, please specify:

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

END OF GROUP

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

**Q364\_** (CDS INCOME LAST PERIOD in section SectionQ)  
About how much did you( or your ^FLHWP/) receive in your last dividends and interest payment from these CDs, government bonds, or treasury bills, before taxes and other deductions?  
RANGE 0..99999996

IF Q364\_ = RESPONSE THEN

**Q365\_** (CDS INCOME SAME PER PERIOD in section SectionQ)  
Do you( or your ^FLHWP/) get about the same amount of dividends and interest (from CDs, Government Savings Bonds, and Treasury Bills) each payment?  
1 Yes  
5 No

END OF IF

END OF IF

IF Q362\_ IN (1,6,7) OR Q362\_ = EMPTY OR (Q362\_ IN (3,4,5) AND Q364\_ = EMPTY) OR (Q362\_ IN (3,4,5) AND Q364\_ != EMPTY AND Q365\_ != 1) THEN

**Q366\_** (CDS INCOME AMOUNT - LCY in section SectionQ)  
About how much dividends and interest did you( or your ^FLHWP/) receive from these CD's, government bonds, or treasury bills in (LAST CALENDAR YEAR()), before taxes and other deductions?  
RANGE 250..1000000

IF Q366\_ = EMPTY THEN

IF X511 = 1 THEN  
| Q367\_Unf\_Random := 11  
ELSEIF X511 = 2 THEN  
| Q367\_Unf\_Random := 10  
ELSE  
| Q367\_Unf\_Random := 12  
END OF IF

**Q367\_Unf** (Unfolding in section SectionQ)  
Thinking about any income received from CD's, government bonds or treasury bills

```

| | | in (LAST CALENDAR YEAR()):
| | | Was it more, about, or less than...
| | | Q367_Unf_Results := explode("'", Q367_Unf)
| | | END OF IF
| | | END OF IF
| | | END OF IF
| | | END OF IF

```

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

Please do not include leased vehicles.  
 1 Yes  
 5 No

```

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

```

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

**Q371\_** (TRANSPORTATION TOTAL VALUE in section SectionQ)  
 What are these transportation vehicles worth altogether, minus anything you still owe on them?  
 RANGE 0..100000

**q371\_diffwarning** (Section SectionQ)  
 According to our records, the amount you entered differs greatly from your last survey in (January/February/March/April/May/June/July/August/September/October/November/December), (()): \$(PRELOADED TRANSPORTATION TOTAL VALUE()). Please review your answer. If it is correct, select Next to continue. Otherwise please make the correction before continuing.

**q371\_flag** (FLAG COMPARE AMOUNT in section PreloadQ)  
 NUMBER (NO DECIMALS ALLOWED)

**END OF GROUP**

```

IF Q371_ = EMPTY THEN
  IF X050 = 1 THEN
    Q372_Unf_Random := 10
  
```

```
ELSEIF X050 = 2 THEN
| Q372_Unf_Random := 11
ELSE
| Q372_Unf_Random := 12
END OF IF
```

**Q372\_Unf** (Unfolding in section SectionQ)  
Thinking about the value of those vehicles:

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

```
Q372_Unf_Results := explode("'", Q372_Unf)
```

```
END OF IF
```

```
END OF IF
```

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

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

Please exclude the cash value of any life insurance policies.

1 Yes

5 No

```
IF Q375_ = 1 THEN
```

```
q376_compare := str_replace(", ", "", q376_compare)
```

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

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

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

RANGE 2000..700000

**q376\_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 OTHER ASSETS TOTAL VALUE()). Please review your answer. If it is correct, select Next to continue. Otherwise please make the correction before continuing.

**q376\_flag** (FLAG COMPARE AMOUNT in section PreloadQ)

| NUMBER (NO DECIMALS ALLOWED)

END OF GROUP

IF Q376\_ = EMPTY THEN

| IF X052 = 1 THEN

| | Q377\_Unf\_Random := 10

| ELSEIF X052 = 2 THEN

| | Q377\_Unf\_Random := 11

| ELSE

| | Q377\_Unf\_Random := 12

END OF IF

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

Thinking about the value of those assets:

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

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

END OF IF

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

Do any of these other savings or assets pay income?

1 Yes

5 No

IF Q380\_ = 1 THEN

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

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

RANGE 0..1000000

IF Q381\_ = EMPTY THEN

| IF X512 = 1 THEN

| | Q382\_Unf\_Random := 11

| ELSEIF X512 = 2 THEN

| | Q382\_Unf\_Random := 10

| ELSE

| | Q382\_Unf\_Random := 12

END OF IF

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

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

```

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

```

**Q395\_ (OTHER SOURCES OF INCOME in section SectionQ)**  
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.

1 Yes  
5 No

**IF Q395\_ = 1 THEN**

```

Q396_ (OTHER SOURCES OF INCOME AMOUNT - LCY in section SectionQ)
How much did you( and your ^FLHWP) receive altogether from these other sources in
(LAST CALENDAR YEAR()), before taxes and other deductions?
RANGE 1000..100000

```

**IF Q396\_ = EMPTY THEN**

**IF X508 = 1 THEN**

Q397\_Unf\_Random := 5

**ELSE**

Q397\_Unf\_Random := 6

**END OF IF**

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

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

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

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

**END OF IF**

**END OF IF**

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

Did you or other family members who may have been living there receive government

food stamps, also known as SNAP benefits, at any time (in the last two years/since ^z092, ^z093)?

Please include immediate family members who live with you.

1 Yes

5 No

**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?

1 Yes

5 No

**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)

- 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
- 12 December
- 13 All months
- 14 No months

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

END OF IF

END OF IF

END OF LOOP

ELSE

LOOP FROM Z093 TO FLCURRENTYEAR

QW777startyr2 := (FLCurrentYear + Z093) - QW777startyr

**QW777\_** (ANY MONTHS RECEIVED FOOD STAMPS in section SectionQ)  
Were there any months in (STARTING YEAR FOR QW777 LOOP- -DECREASING YEARS()) when you, or other family members who may have been living there, were receiving government food stamps or SNAP benefits?

- 1 Yes
- 5 No

IF QW777\_(QW777startyr2) = 1 THEN

IF QW777startyr2 = FLCurrentYear THEN

Fill code of question FLQW778 executed

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

Please choose all that apply.

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

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

**ELSEIF QW777startyr2 = Z093 THEN**

Fill code of question FLQW778\_min executed

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

Please choose all that apply.

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

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

ELSE

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

Please choose all that apply.

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

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

END OF IF

END OF IF

END OF LOOP

END OF IF

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

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

- 1 Yes
- 5 No

IF Q532\_ = 5 THEN

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

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

RANGE 0..99999996

```

IF Q406_ = EMPTY THEN
  IF X509 = 1 THEN
    Q407_Unf_Random := 5
  ELSE
    Q407_Unf_Random := 6
  END OF IF

Q407_Unf (Unfolding in section SectionQ)
Thinking about the value of the food stamps or SNAP benefits in the last month that
you received them:

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

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

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

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

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

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

IF A167_A028 = 1 AND not(X065ACouplenss(1) IN (1,2,3,4)) THEN
|
ELSEIF A167_A028 = 1 AND (A030 = YES OR A209_LivTogethr = YES OR A033_SplnNHome
= 1) THEN
|

```

**ELSE**

**Q414\_** (R SUBSIDIZED FOOD AT HOME SINCE LAST IW in section SectionQ)

Did you or other family members who may have been living there have any free or subsidized meals (such as 'Meals on Wheels') delivered to you at home at any time (in the last two years/since ^z092, ^z093)?

1 Yes

5 No

**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?

1 Yes

5 No

**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?

1 Yes

5 No

**END OF IF**

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

Fill code of question FLQ417 executed

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

(In addition to any food bought with food stamps or SNAP benefits, about/About) how much do you, and other family members who may be living there, spend on food that you use at home in an average week?

RANGE 0..99999996

**IF Q417\_ = EMPTY THEN**

**IF X513 = 1 THEN**

| Q418\_Unf\_Random := 5

**ELSEIF X513 = 2 THEN**

| Q418\_Unf\_Random := 6

**ELSE**

| Q418\_Unf\_Random := 3

**END OF IF**

**Q418\_Unf** (Unfolding in section SectionQ)

Thinking about what you spend on food for use at home in an average week:

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

Q418\_Unf\_Results := explode("'", Q418\_Unf)

END OF IF

**Q421\_** (R-HHMEM GET FOOD DELIVERED TO DOOR in section SectionQ)

Do you, or other family members who may be living there, have any food delivered to the door which isn't included in that amount?

1 Yes

5 No

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)

Thinking about any money you spend on eating out:

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

Q427\_Unf\_Results := explode("'", Q427\_Unf)

END OF IF

END OF IF

### LOOP FROM 3 TO PERSONCOUNTER

IF X061ARelateR(Qcnt) IN (3,4,5,6,7,8,90,91) AND X056AResStat(Qcnt) IN (1,2,3) AND X067AYrBorn(Qcnt) = RESPONSE AND (FLCurrentYear - X067AYrBorn(Qcnt) > 15) THEN

**Q432\_** (IF HHMEM WORKED IN LCY in section SectionQ)

During (LAST CALENDAR YEAR()), did (**FIRST NAME OF HH MEMBERS/CHILDREN(Qcnt)**) ((**RELATIONSHIP TO R(Qcnt)**)) do any work for pay?

1 Yes

5 No

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/he/she) earned from all jobs in (LAST CALEN-
| DAR 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)) ((RELATIONSHIP TO R(Qcnt))) do any work for pay?
| | 1 Yes
| | 5 No
|
| | 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/he/she) earned from all jobs in (LAST CALENDAR YEAR()):

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

Q434\_Unf\_Results(Qcnt) := explode("'", Q434\_Unf(Qcnt))

END OF IF

END OF IF

END OF IF

END OF LOOP

IF A098\_NumHHM > 0 THEN

**Q437\_** (HHMEM NON JOB INCOME RECD AMOUNT in section SectionQ)

Not including job income, about how much in total did other members of your family living in your household receive in (LAST CALENDAR YEAR()) from Social Security, pensions, welfare, interest, gifts, or anything else, before taxes and other deductions?

Please enter zero if none.

RANGE 0..99999996

IF Q437\_ = EMPTY THEN

IF X515 = 1 THEN

```
| Q438_Unf_Random := 5
ELSEIF X515 = 2 THEN
| Q438_Unf_Random := 3
ELSE
| Q438_Unf_Random := 6
END OF IF
```

**Q438\_Unf** (Unfolding in section SectionQ)

Thinking about the other members of your family living there, and any other money they received in (LAST CALENDAR YEAR()):

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

```
Q438_Unf_Results := explode("'", Q438_Unf)
```

END OF IF

**Q441\_** (HHMEM ASSETS in section SectionQ)

Do other members of your family living in your household have more than \$5,000 total in bank accounts, other financial assets, vehicles, property, or other investments?

Please do not include assets of yourself( or your ^FLHWP/).

1 Yes

5 No

IF Q441\_ = 1 THEN

```
Fill code of question FLQ442 executed
```

**Q442\_** (HHMEM ASSET AMOUNT in section SectionQ)

About how much altogether would these other family members' assets amount to, minus any debts they might have?

Please enter zero if none.

RANGE 5000..99999996

IF Q442\_ = EMPTY THEN

```
IF X502 = 1 THEN
```

```
| Q443_Unf_Random := 10
```

```
ELSE
```

```
| Q443_Unf_Random := 11
```

```
END OF IF
```

**Q443\_Unf** (Unfolding in section SectionQ)

Thinking about the value of these assets:

```

| | Would it be more, about, or less than...
| | Q443_Unf_Results := explode("'", Q443_Unf)
| | END OF IF
| | END OF IF
| | END OF IF

```

**Q446\_** (R OR SP FILE INCOME TAX RETURN - LCY in section SectionQ)  
Did you( or your ^FLHWP/) file a federal income tax return form for (LAST CALENDAR YEAR())?  
1 Yes  
5 No

**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?
| | 1 Yes
| | 5 No

```

**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.)  
1 Yes  
5 No

**IF Q453\_ = 1 THEN**

```

| | Q454_ (AMOUNT DONATE TO CHARITY in section SectionQ)
| | About how much money did these charitable donations amount to?
| | RANGE 0..99999996

```

**IF Q454\_ = EMPTY THEN**

```

| | IF X504 = 1 THEN
| | | Q455_Unf_Random := 5
| | ELSE
| | | Q455_Unf_Random := 6

```

END OF IF

**Q455\_Unf** (Unfolding in section SectionQ)

Thinking about your donations in (LAST CALENDAR YEAR()):

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

Q455\_Unf\_Results := explode("'", Q455\_Unf)

END OF IF

END OF IF

**Q464\_** (PUT ANY ASSETS IN TRUST in section SectionQ)

Have you( and your ^FLHWP/) put any of your assets into a trust?

1 Yes

5 No

IF Q464\_ = 1 THEN

**Q465\_** (RCV TRUST BENEFITS in section SectionQ)

Do you( or your ^FLHWP/) receive any income from your trust(s)?

1 Yes

5 No

q467\_compare := str\_replace(", ", "", q467\_compare)

GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

**Q467\_** (VALUE OF ANY TRUSTS in section SectionQ)

What about the value of any trusts?

If you( or your ^FLHWP/) could sell all the assets you have put in trusts, about how much would you have?

RANGE 0..100000

**q467\_diffwarning** (Section SectionQ)

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

**q467\_flag** (FLAG COMPARE AMOUNT in section PreloadQ)

NUMBER (NO DECIMALS ALLOWED)

END OF GROUP

IF Q467\_ = EMPTY THEN

IF X505 = 1 THEN

Q468\_Unf\_Random := 11

ELSE

Q468\_Unf\_Random := 10

END OF IF

**Q468\_Unf** (Unfolding in section SectionQ)

Thinking about the value of any assets put into trusts:

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

Q468\_Unf\_Results := explode("", Q468\_Unf)

END OF IF

**Q471\_** (ALL OTHER ASSETS IN TRUSTS PREV REPORTED in section SectionQ)

Have you already mentioned all of the investments and other assets that are included in the trust?

1 Yes

5 No

IF Q471\_ = 5 THEN

**Q472\_** (VALUE ASSETS NOT PREV REPORTED in section SectionQ)

What is the value of the assets in the trust that you did **NOT** include earlier?

RANGE 0..1000000

IF Q472\_ = EMPTY THEN

IF Q473\_Unf\_Random = EMPTY THEN

Q473\_Unf\_Random := 11

END OF IF

**Q473\_Unf** (Unfolding in section SectionQ)

Thinking about those other assets in the trust:

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

Q473\_Unf\_Results := explode("", Q473\_Unf)

END OF IF

END OF IF

**Q476\_** (CHANGE TERMS OF TRUST in section SectionQ)

If you wanted to, could you change the terms of the trust?

1 Yes

5 No

END OF IF

**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

6 Have no credit card(s) and/or only have debit card(s)

IF Q518\_ = 5 OR Q518\_ = EMPTY THEN

**Q519\_** (AMOUNT CRED CARD DEBT CARRIED OVER in section SectionQ)

How much credit card debt did you( and your ^FLHWP) carry over from last month to this one?

Please report the total amount owed, not the amount paid off or the minimum payment.

Please enter zero if all accounts were paid in full.

RANGE 0..99999996

IF Q519\_ = EMPTY THEN

IF X518 = 1 THEN

Q520\_Unf\_Random := 11

ELSEIF X518 = 2 THEN

Q520\_Unf\_Random := 10

ELSE

Q520\_Unf\_Random := 12

END OF IF

**Q520\_Unf** (Unfolding in section SectionQ)

Thinking about the credit card debt that was carried over from last month:

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

Q520\_Unf\_Results := explode("", Q520\_Unf)

END OF IF

END OF IF

**Q539\_** (R OR SP ANY MONEY OWED MEDICAL SERVICES in section SectionQ)

Do you( or your ^FLHWP/) owe any money for medical services to doctors, hospitals or

other healthcare providers?

(IWER: Please do not include any amount counted toward any credit card balance.)

1 Yes

5 No

**IF Q539\_ = 1 THEN**

**Q540\_** (R OR SP MEDICAL SERVICES DEBTS AMOUNT in section SectionQ)

Altogether, about how much would these medical debts amount to?

RANGE 0..99999996

**IF Q540\_ = EMPTY THEN**

**IF X518 = 1 THEN**

| Q541\_Unf\_Random := 3

**ELSEIF X051 = 2 THEN**

| Q541\_Unf\_Random := 5

**ELSE**

| Q541\_Unf\_Random := 6

**END OF IF**

**Q541\_Unf** (Unfolding in section SectionQ)

Thinking about those medical debts:

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

Q541\_Unf\_Results := explode("'", Q551\_Unf)

**END OF IF**

**END OF IF**

**Q544\_** (R OR SP ANY MONEY OWED EDUCATION DEBT in section SectionQ)

Do you( or your ^FLHWP/) owe any money or have any student loans for educational expenses?

(IWER: Please include any loans you are responsible for, for your own education or someone else's.)

1 Yes

5 No

**IF Q544\_ = 1 THEN**

**Q545\_** (R OR SP EDUCATION DEBTS AMOUNT in section SectionQ)

Altogether, about how much would these education related debts amount to?

RANGE 0..99999996

**IF Q545\_ = EMPTY THEN**

| **IF X518 = 1 THEN**

```
| Q546_Unf_Random := 3
ELSEIF X051 = 2 THEN
| Q546_Unf_Random := 5
ELSE
| Q546_Unf_Random := 6
END OF IF
```

**Q546\_Unf** (Unfolding in section SectionQ)  
Thinking about those education related debts:

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

```
Q546_Unf_Results := explode("'", Q551_Unf)
```

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

**Q549\_** (R OR SP ANY DEBTS NOT ASKED ABOUT BEFORE in section SectionQ)  
Do you( or your ^FLHWP/) have any debts that we haven't asked about, such as such as 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.

1 Yes  
5 No

```
IF Q549_ = 1 THEN
```

```
Q550_ (R OR SP DEBTS AMOUNT in section SectionQ)
Altogether, about how much would these other debts amount to?
RANGE 0..99999996
```

```
IF Q550_ = EMPTY THEN
```

```
IF X518 = 1 THEN
| Q551_Unf_Random := 3
ELSEIF X051 = 2 THEN
| Q551_Unf_Random := 5
ELSE
| Q551_Unf_Random := 6
END OF IF
```

**Q551\_Unf** (Unfolding in section SectionQ)  
Thinking about those other debts:

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

Q551\_Unf\_Results := explode("'", Q551\_Unf)

END OF IF

END OF IF

LOOP FROM 1 TO 3

IF LScnt = 1 OR Q483\_(LScnt - 1) = 1 THEN

Fill code of question FLQ483Q1 executed

Fill code of question FLQ483Q2 executed

**Q483\_** (R OR SP IF LUMP SUM RECEIVED in section SectionQ)

(People sometimes receive large amounts of money or property in the form of an inheritance, a trust fund, an insurance settlement, and so on.

/) (Since ^Z092, ^Z093 have you^FLQspouse ever received money or property in the form of an inheritance, a trust fund, or an insurance settlement?/Since ^Z092, ^Z093 have you^FLQspouse ever received any other large lump sum payments?/In the last two years, have you^FLQspouse ever received money or property in the form of an inheritance, a trust fund, or an insurance settlement?/In the last two years, have you^FLQspouse ever received any other large lump sum payments?)

By 'large' we mean \$10,000 or more.

1 Yes

5 No

IF Q483\_(LScnt) = 1 THEN

Fill code of question FLQ484Q executed

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

**Q484\_** (LUMP SUM FROM WHAT in section SectionQ)

What was the (next/) largest lump sum- -was it from an inheritance, a trust, an insurance settlement, or something else?

1 Insurance settlement

2 Pension settlement

3 Inheritance or trust

4 Gift

5 Lawsuit

7 Other, please specify:

**Q485S** (LUMP SUM FROM WHAT-SPECIFY in section SectionQ)

| STRING

END OF GROUP

IF Q484\_(LScnt) = EMPTY OR Q484\_(LScnt) != EMPTY THEN

Fill code of question FLQ484A executed

**Q487\_** (YEAR LUMP SUM RECEIVED in section SectionQ)

In what year did you( or your ^FLHWP/) receive a lump sum from that (insurance settlement/pension settlement/inheritance or trust/gift/lawsuit/^Q485S(LScnt))?  
RANGE 1900..(CURRENT CALENDAR YEAR())

IF Q487\_(LScnt) > FLCurrentYear - 3 THEN

**Q486\_** (MONTH LUMP SUM RECEIVED in section SectionQ)

What month was that?

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

END OF IF

**Q488\_** (LUMP SUM AMOUNT RECEIVED in section SectionQ)

About how much did you( or your ^FLHWP/) receive from the (insurance settlement/pension settlement/inheritance or trust/gift/lawsuit/^Q485S(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 we last interviewed you.

First we will retrieve the financial information we have on record. Please click

"Next" and wait until the next screen appears.

#### Start of section **PreloadR**

```
H004 := getHRSPreload(2,"H004_OwnRent")
H008 := getHRSPreload(2,"H008_OwnFarm")
H014 := getHRSPreload(2,"H014_OwnMobile")
H151 := getHRSPreload(2,"H151_Own2ndHome")
H020 := getHRSPreload(2,"H020_HomeValue1st")
H166 := getHRSPreload(2,"H166_HomeValue2nd")
R077_home := getHRSPreload(2, "R077_home")
preload_H004 := getHRSPreloadWave4(2,"H004_OwnRent")
preload_H008 := getHRSPreloadWave4(2,"H008_OwnFarm")
preload_H014 := getHRSPreloadWave4(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 := getHRSPreloadWave4(5, "Q133_")
```

```
IF preload_Q133 IN (1,2) THEN
| Z098 := 1
END OF IF
```

```
preload_Q147 := getHRSPreloadWave4(5, "Q147_")
```

```
IF preload_Q147 IN (1,2) THEN
| X086 := 1
END OF IF
```

```
X027 := getHRSPreloadWave4(2, "H151_Own2ndHome")
X087 := getHRSPreloadWave4(5, "Q316_")
preload_hhmembercounter := getHRSPreloadWave4(1,"hhmembercounter")
hhmembercounter := getHRSPreload(1,"hhmembercounter")
```

#### End of section **PreloadR**

Fill code of question FLQspouse executed  
Fill code of question FLQspouse2 executed

```
IF X079 = 1 OR H004 = 1 OR H151 = 1 OR H014 IN (1,2,3) OR H008 IN (1,2)
THEN
```

**R002** (bought or sold home in section SectionR)

Since (January/February/March/April/May/June/July/August/September/October/November/December),  
(()), have you( or your ^FLHWP/) bought or sold a home that was your primary resi-  
dence or second home?

1 Yes

5 No

**IF R002 = YES THEN**

**R003** (buy, sell, or both in section SectionR)

Did you only buy, only sell, or both buy and sell?

If there were multiple sales or multiple purchases, please select 'Other, please  
specify.'

1 Only bought

2 Only sold

3 Both bought and sold

7 Other, please specify:

**IF r003 = 7 THEN**

**R004** (other buy, sell, or both in section SectionR)

Please describe the transaction(s), including the month, year, and purchase price  
for each home.

STRING

**END OF IF**

**IF R003 IN (1,3) THEN**

**R006** (year bought home in section SectionR)

In what year did you buy a home?

RANGE (())..(CURRENT CALENDAR YEAR())

**IF (FLCurrentYear - R006) < 3 THEN**

**R005** (month bought home in section SectionR)

What month was that?

1 January

2 February

3 March

4 April

5 May

6 June

7 July

8 August

9 September

10 October

11 November

| 12 December

END OF IF

**R007** (purchase price in section SectionR)

What was the purchase price?

RANGE 0..99999996

IF R007 = EMPTY THEN

R008\_Unf\_Random := 11

**R008\_Unf** (Unfolding in section SectionR)

Thinking about the purchase price:

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

R008\_Unf\_Results := explode("'", R008\_Unf)

END OF IF

END OF IF

IF R003 IN (2,3) THEN

**R012** (year sold home in section SectionR)

In what year did you sell a home?

RANGE (())..(CURRENT CALENDAR YEAR())

IF (FLCurrentYear - R012) < 3 THEN

**R011** (month sold home in section SectionR)

What month was that?

1 January

2 February

3 March

4 April

5 May

6 June

7 July

8 August

9 September

10 October

11 November

12 December

END OF IF

**R013** (selling price in section SectionR)

What was the selling price?

RANGE 0..99999996

**IF R013 = EMPTY THEN**

R014\_Unf\_Random := 11

**R014\_Unf** (Unfolding in section SectionR)  
Thinking about the selling price:

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

R014\_Unf\_Results := explode('~', R014\_Unf)

**END OF IF**

**R018** (year bought sold home in section SectionR)  
In what year did you buy the home that you sold?  
RANGE 1900..(CURRENT CALENDAR YEAR())

**IF (FLCurrentYear - R018) < 3 THEN**

**R017** (month bought sold home in section SectionR)  
What month was that?

1 January

2 February

3 March

4 April

5 May

6 June

7 July

8 August

9 September

10 October

11 November

12 December

**END OF IF**

**R019** (purchase price of sold home in section SectionR)  
What was the purchase price of the home that you sold?  
RANGE 0..99999996

**IF R019 = EMPTY THEN**

R020\_Unf\_Random := 11

**R020\_Unf** (Unfolding in section SectionR)  
Thinking about the purchase price of the home that you sold:

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

R020\_Unf\_Results := explode("'", R020\_Unf)

END OF IF

END OF IF

END OF IF

Fill code of question FLR023 executed

**R023** (any major improvements in section SectionR)

Since (January/February/March/April/May/June/July/August/September/October/November/December),  
(()), did you( or your ^FLHWP/) (make any major additions or home improvements to a  
primary residence or second home that you owned/make any major additions or home  
improvements to a primary residence that you owned)?

1 Yes

5 No

**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?

RANGE 0..99999996

**IF R024 = EMPTY THEN**

R025\_Unf\_Random := 11

**R025\_Unf** (Unfolding in section SectionR)

Thinking about the dollar cost of these additions and improvements:

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

R025\_Unf\_Results := explode("'", R025\_Unf)

END OF IF

END OF IF

END OF IF

**IF Z098 = 1 OR Q133\_ IN (1,2) THEN**

**R028** (sold any real estate in section SectionR)

Since (January/February/March/April/May/June/July/August/September/October/November/December),  
(()), have you( or your ^FLHWP/) sold any real estate other than your principal residence  
or second home, such as land, or rental or investment property?

1 Yes

5 No

**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),  
(())?

1 Yes

5 No

**IF R029 = YES THEN**

**R030** (amount paid real estate in section SectionR)

About how much in total did you pay for this real estate?

RANGE 0..99999996

**IF R030 = EMPTY THEN**

R031\_Unf\_Random := 11

**R031\_Unf** (Unfolding in section SectionR)

Thinking about how much you paid in total for this real estate:

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

R031\_Unf\_Results := explode("'", R031\_Unf)

**END OF IF**

**END OF IF**

**R044** (made any major improvements in section SectionR)

Since (January/February/March/April/May/June/July/August/September/October/November/December),  
(()), did you( or your ^FLHWP/) make any major additions or home improvements  
to any real estate properties that you owned, other than your principal residence or  
second home?

Please do not count general maintenance or upkeep.

1 Yes

5 No

**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?

RANGE 0..99999996

**IF R045 = EMPTY THEN**

R046\_Unf\_Random := 11

**R046\_Unf** (Unfolding in section SectionR)

Thinking about the dollar cost of these additions and improvements:

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

R046\_Unf\_Results := explode("'", R046\_Unf)

END OF IF

END OF IF

ELSE

**R034** (also bought any real estate in section SectionR)

Did you( and your ^FLHWP) also buy any real estate of this sort since (January/February/March/April/May/June/July/August/September/October/November/December),  
(())?

1 Yes

5 No

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),  
(())?

RANGE 0..99999996

IF R035 = EMPTY THEN

R036\_Unf\_Random := 11

**R036\_Unf** (Unfolding in section SectionR)

Thinking about the total dollar value of the real estate you sold:

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

R036\_Unf\_Results := explode("'", R036\_Unf)

END OF IF

ELSE

**R039** (comparison bought versus sold real estate in section SectionR)

Overall, was the dollar cost of the real estate you bought greater than the dollar value of 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?

RANGE 0..99999996

**IF R040 = EMPTY THEN**

R041\_Unf\_Random := 11

**R041\_Unf** (Unfolding in section SectionR)

Thinking about how much (more/less) you bought than you sold:

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

R041\_Unf\_Results := explode("", R041\_Unf)

**END OF IF**

**END OF IF**

**END OF IF**

**R044** (made any major improvements in section SectionR)

Since (January/February/March/April/May/June/July/August/September/October/November/December),  
(()), did you( or your ^FLHWP/) make any major additions or home improvements  
to any real estate properties that you owned, other than your principal residence or  
second home?

Please do not count general maintenance or upkeep.

1 Yes

5 No

**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?

RANGE 0..99999996

**IF R045 = EMPTY THEN**

R046\_Unf\_Random := 11

**R046\_Unf** (Unfolding in section SectionR)

Thinking about the dollar cost of these additions and improvements:

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

```

| | R046_Unf_Results := explode("'", R046_Unf)
| | END OF IF
| | END OF IF
| | END OF IF
| | END OF IF

```

**IF x086 = 1 OR Q147\_ IN (1,2) THEN**

**R049** (put personal funds into privately held business in section SectionR)  
Since (January/February/March/April/May/June/July/August/September/October/November/December),  
(()), have you( or your ^FLHWP/) put personal funds into a privately held business,  
professional practice, partnership or farm that you own or share ownership in?  
1 Yes  
5 No

**IF R049 = YES THEN**

**R050** (how much put into prviately held business in section SectionR)  
Altogether, about how much new money did you( or your ^FLHWP/) put into that,  
including any funds that you borrowed?  
RANGE 0..99999996

**IF R050 = EMPTY THEN**

R051\_Unf\_Random := 11

**R051\_Unf** (Unfolding in section SectionR)  
Thinking about how much new money you( or your ^FLHWP/) put into that:  
Was it more, about, or less than...

R051\_Unf\_Results := explode("'", R051\_Unf)

**END OF IF**

**END OF IF**

**R054** (sold privately held business in section SectionR)  
Since (January/February/March/April/May/June/July/August/September/October/November/December),  
(()), have you( or your ^FLHWP/) sold part or all of any interest in a privately held  
business,professional practice, partnership or farm?  
1 Yes  
5 No

**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.  
RANGE 0..99999996

**IF R055 = EMPTY THEN**

R056\_Unf\_Random := 11

**R056\_Unf** (Unfolding in section SectionR)

Thinking about how much you( or your ^FLHWP/) sold your interest for:

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

R056\_Unf\_Results := explode("'", R056\_Unf)

**END OF IF**

**R060** (year sold in section SectionR)

In what year did you sell that?

If there were multiple sales, please provide the year of the most recent sale.

RANGE (())..(CURRENT CALENDAR YEAR())

**IF (FLCurrentYear - R060) < 3 THEN**

**R059** (month of sale in section SectionR)

What month was that?

1 January

2 February

3 March

4 April

5 May

6 June

7 July

8 August

9 September

10 October

11 November

12 December

**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?

1 Yes

5 No

**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?

1 Yes

5 No

**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)?

RANGE 0..99999996

**IF R064 = EMPTY THEN**

R065\_Unf\_Random := 11

**R065\_Unf** (Unfolding in section SectionR)

Thinking about how much more you (put in than you took out/take out than you put in):

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

R065\_Unf\_Results := explode("", R065\_Unf)

**END OF IF**

**END OF IF**

**ELSE**

**R068** (how much put into stocks in section SectionR)

Altogether, how much money (including any automatic reinvestment) did you( or your ^FLHWP/) put into that?

RANGE 0..99999996

**IF R068 = EMPTY THEN**

```

R069_Unf_Random := 11

R069_Unf (Unfolding in section SectionR)
Thinking about how much money (including any automatic reinvestment) you( or
your ^FLHWP/) put into that:

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

R069_Unf_Results := explode("'", R069_Unf)
END OF IF
END OF IF
ELSE
R072 (sold any stock in section SectionR)
Since (January/February/March/April/May/June/July/August/September/October/November/December),
(()), have you( or your ^FLHWP/) sold any shares of stock in publicly held corporations
or taken money out of any mutual funds, managed investment accounts or trusts?
1 Yes
5 No

IF R072 = YES THEN
R073 (how much sold stocks in section SectionR)
Altogether, how much money did you( or your ^FLHWP/) get from that?
RANGE 0..99999996

IF R073 = EMPTY THEN
R074_Unf_Random := 11

R074_Unf (Unfolding in section SectionR)
Thinking about how much money you( or your ^FLHWP/) got from that:

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

R074_Unf_Results := explode("'", R074_Unf)
END OF IF
END OF IF
END OF IF
END OF IF

IF X079 != 1 OR R077_home = YES THEN
|
ELSE
IF R002 = 5 THEN
GROUP OF QUESTIONS PRESENTED ON THE SAME SCREEN

```

**R077** (what happened to owned home in section SectionR)

Our records show that you( and your ^FLHWP) owned a home in (January/February/March/April/May/June/July/August/September/October/November/December),  
(()) that you do not now own and did not sell.

What happened to that home?

1 Gave it to someone

2 Did not own home in (January/February/March/April/May/June/July/August/September/October/November/D  
(()))

7 Other, please specify:

**R078** (other what happened to owned home in section SectionR)

STRING

END OF GROUP

**IF R077 = 1 THEN**

Fill code of question FLR080 executed

**R079** (who give home to in section SectionR)

Who did you( or your ^FLHWP/) give the house to, that is what is their relationship  
to you?

2 (Child, child-in-law, or grandchild/Child or child-in-law/Child or grandchild/Child-in-  
law or grandchild/Child/Child-in-law/Grandchild)

3 Other relative

4 Someone else

**IF R079 = 2 THEN**

FL\_CHILDLIST := getHRSPreload(1, "FL\_CHILDLIST", 2)

**R103** (which child gave home to in section SectionR)

Which child is that? Please choose all that apply.

Note: if you gave it to a grandchild, please choose the parent of that grand-  
child.

3 ((3))

4 ((4))

5 ((5))

6 ((6))

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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/December),  
(())

7 Other, please specify:

**R082** (other what did with proceeds of home sale in section SectionR)

STRING

END OF GROUP

END OF IF

END OF IF

**R083** (anyone move out took assets or debts in section SectionR)

Sometimes changes in a family's savings or assets are due to people joining or leaving the family.

Was there anyone living with you( and your ^FLHWP) in (January/February/March/April/May/June/July/August/September/October/November/December),  
(()) who doesn't live with you now and who took \$5,000 or more in assets or debts away with them?

1 Yes, took assets

2 Yes, took debts

3 Both assets and debts

5 No

IF R083 IN (1,3) THEN

**R084** (value of removed assets in section SectionR)

Altogether, what is the total dollar value of assets that were removed that way?

RANGE 0..99999996

IF R084 = EMPTY THEN

R085\_Unf\_Random := 11

**R085\_Unf** (Unfolding in section SectionR)

Thinking about the total dollar value of assets that were removed that way:

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

R085\_Unf\_Results := explode("", R085\_Unf)

END OF IF

END OF IF

IF R083 IN (2,3) THEN

**R088** (value of removed debts in section SectionR)

Altogether, what is the total dollar value of debts that were removed that way?

RANGE 0..99999996

IF R088 = EMPTY THEN

R089\_Unf\_Random := 11

**R089\_Unf** (Unfolding in section SectionR)

Thinking about the total dollar value of debts that were removed that way:

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

R089\_Unf\_Results := explode("", R089\_Unf)

END OF IF

END OF IF

**R092** (anyone move out took assets or debts in section SectionR)

Is there anyone in your family living with you( and your ^FLHWP) now who has joined the family since (January/February/March/April/May/June/July/August/September/October/November/December), (()) and who had \$5,000 or more in assets or debts at the time they joined the family?

1 Yes, had assets

2 Yes, had debts

3 Both assets and debts

5 No

IF R092 IN (1,3) THEN

**R093** (value of added assets in section SectionR)

Altogether, what was the total dollar value of assets that were brought into the family in that way?

RANGE 0..99999996

IF R093 = EMPTY THEN

R094\_Unf\_Random := 11

**R094\_Unf** (Unfolding in section SectionR)

Thinking about the total dollar value of assets that were brought into the family in that way:

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

R094\_Unf\_Results := explode("'", R094\_Unf)

END OF IF

END OF IF

IF R092 IN (2,3) THEN

**R097** (value of added debts in section SectionR)

Altogether, what was the total dollar value of debts that were brought into the family in that way?

RANGE 5000..99999996

IF R097 = EMPTY THEN

R098\_Unf\_Random := 11

**R098\_Unf** (Unfolding in section SectionR)

Thinking about the total dollar value of debts that were brought into the family in that way:

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

R098\_Unf\_Results := explode("'", R098\_Unf)

END OF IF

END OF IF

**R101** (how often assistance in section SectionR)

How often did you receive assistance with answers to the questions in this section?

1 Never

2 A few times

3 Most or all of the time

END OF IF

End of section **SectionR**

Start of section **Closing**

**CS\_001** (HOW PLEASANT INTERVIEW in section Closing)

Could you tell us how interesting or uninteresting you found the questions in this survey?

1 Very interesting

2 Interesting

3 Neither interesting nor uninteresting

4 Uninteresting

5 Very uninteresting

**CS\_003** (comments in section Closing)

Do you have any other comments on the survey? Please type these in the box below. (If you have no comments, please click next to complete this survey.)

STRING

End of section **Closing**

*/\* Please note that although question CS\_003 is listed in the routing, the answers are not included in the microdata in the event identifiable information is captured. Cleaned responses are available by request. \*/*