

New Immigrant Survey
Section H - Assets and Income Part 2

Section H: Assets and Income Part 2

Time Stamp and Date Stamp

H1. Is this place where you live a house, apartment, or what?

1. HOUSE [H1A]
2. APARTMENT [H1A]
3. DORMITORY [H22]
4. STUDENT HOUSING [H22]
5. JAIL [H31]
6. INSTITUTION [H22]
7. CONDO [H1A]
8. MOBILE HOME [H1A]
9. FARM [H1A]
97. OTHER [H1A]
- 2. DK [H1A]
- 1. RF [H1A]

H1A. Do you {Text fill IF A52=1 OR 2: and your husband/wife/partner/spouse or partner} own this {Text fill: If H1=1, 7, 8, 9, 97, -2, -1: "home"}{Text fill: If H1=2: "apartment"}, rent it, or what?

[IWER: PROBE DK AND RF]

1. OWN OR BUYING [H3]
2. RENT [H22]
3. LIVE HERE FOR FREE [H2]
- 2. DK [H26]
- 1. RF [H26]

H2. Why is that?

_____ {80 characters} [H26]

- 2. DK [H26]
- 1. RF [H26]

H3. What is its present value? I mean, about what would it bring in U.S. dollars if it were sold today?

[IWER: DO NOT PROBE DK]

{If nothing, enter 0 in amount}

US\$ _____ {8-digits}[H5; If H3=0:H5]

- 2. DK [ASSIGN RANDOM #1-3: H4A/RANDOM ASSIGNMENT]
- 1. RF [ASSIGN RANDOM #1-3: H4A/RANDOM ASSIGNMENT]

RANDOM ASSIGNMENT 1:

H4A. Would it amount to less than \$15,000, more than \$15,000, or what?

1. LESS THAN \$15,000 [H5]
3. ABOUT \$15,000 [H5]
5. MORE THAN \$15,000 [H4B]
- 2. DK [H5]
- 1. RF [H5]

H4B. Would it amount to less than \$50,000, more than \$50,000, or what?

1. LESS THAN \$50,000 [H5]
3. ABOUT \$50,000 [H5]

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- 5. MORE THAN \$50,000 [H4C]
- 2. DK [H5]
- 1. RF [H5]

H4C. Would it amount to less than \$150,000, more than \$150,000, or what?

- 1. LESS THAN \$150,000 [H5]
- 3. ABOUT \$150,000 [H5]
- 5. MORE THAN \$150,000 [H4D]
- 2. DK [H5]
- 1. RF [H5]

H4D. Would it amount to less than \$500,000, more than \$500,000, or what?

- 1. LESS THAN \$500,000 [H5]
- 3. ABOUT \$500,000 [H5]
- 5. MORE THAN \$500,000 [H5]
- 2. DK [H5]
- 1. RF [H5]

RANDOM ASSIGNMENT 2:

H4B. Would it amount to less than \$50,000, more than \$50,000, or what?

- 1. LESS THAN \$50,000 [H4A]
- 3. ABOUT \$50,000 [H5]
- 5. MORE THAN \$50,000 [H4C]
- 2. DK [H5]
- 1. RF [H5]

H4C. Would it amount to less than \$150,000, more than \$150,000, or what?

- 1. LESS THAN \$150,000 [H5]
- 3. ABOUT \$150,000 [H5]
- 5. MORE THAN \$150,000 [H4D]
- 2. DK [H5]
- 1. RF [H5]

H4D. Would it amount to less than \$500,000, more than \$500,000, or what?

- 1. LESS THAN \$500,000 [H5]
- 3. ABOUT \$500,000 [H5]
- 5. MORE THAN \$500,000 [H5]
- 2. DK [H5]
- 1. RF [H5]

H4A. Would it amount to less than \$15,000, more than \$15,000, or what?

- 1. LESS THAN \$15,000 [H5]
- 3. ABOUT \$15,000 [H5]
- 5. MORE THAN \$15,000 [H5]
- 2. DK [H5]
- 1. RF [H5]

RANDOM ASSIGNMENT 3:

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H4C. Would it amount to less than \$150,000, more than \$150,000, or what?

- 1. LESS THAN \$150,000 [H4B]
- 3. ABOUT \$150,000 [H5]
- 5. MORE THAN \$150,000 [H4D]
- 2. DK [H5]
- 1. RF [H5]

H4D. Would it amount to less than \$500,000, more than \$500,000, or what?

- 1. LESS THAN \$500,000 [H5]
- 3. ABOUT \$500,000 [H5]
- 5. MORE THAN \$500,000 [H5]
- 2. DK [H5]
- 1. RF [H5]

H4B. Would it amount to less than \$50,000, more than \$50,000, or what?

- 1. LESS THAN \$50,000 [H4A]
- 3. ABOUT \$50,000 [H5]
- 5. MORE THAN \$50,000 [H5]
- 2. DK [H5]
- 1. RF [H5]

H4A. Would it amount to less than \$15,000, more than \$15,000, or what?

- 1. LESS THAN \$15,000 [H5]
- 3. ABOUT \$15,000 [H5]
- 5. MORE THAN \$15,000 [H5]
- 2. DK [H5]
- 1. RF [H5]

H5_X. {PROGRAM WILL DISPLAY QUESTION TEXT ON H5_1 SCREEN. FOR H5_2 AND H5_3 SCREENS, A NOTE WILL BE DISPLAYED TO THE INTERVIEWER: CODE ANY ADDITIONAL LOANS REPORTED BY R} (When X=1: Do you have a mortgage or land contract?) (When X=2: Do you have a second mortgage?) (When X=3: Do you have any other loan that uses the property as collateral? Please do not include home equity lines of credit.)

[IF H5_2 OR H5_3 – IWER: CODE ANY ADDITIONAL LOANS REPORTED BY R]

[IWER: IF R SAYS THEY REFINANCED THE MORTGAGE, TREAT IT AS A MORTGAGE]

- 1. YES, MORTGAGE/LAND CONTRACT [H5_X; IF 3RD ITER.: H6]
- 2. YES, SECOND MORTGAGE [H5_X; IF 3RD ITER. AND NO H5_X=1: H10; IF 3RD ITER. AND ANY H5_X=1: H6]
- 3. YES, OTHER LOANS [H5_X; IF 3RD ITER. AND NO H5_X=1 OR 2: H13; IF 3RD ITER. ANY H5_X=1: H6; IF 3RD ITER. AND NO H5_X=1 AND ANY H5_X=2: H10]
- 4. NO/NO OTHER LOANS REPORTED [IF NO H5_X=1,2 OR 3: H16; IF ANY H5_X=1: H6; IF ANY H5_X=2 AND NO H5_X=1: H10; IF ANY H5_X=3 AND NO H5_X=1 OR 2: H13]
- 2. DK [H5_X; IF 3RD ITER. AND ANY H5_X=1: H6; IF 3RD ITER. AND NO H5_X=1 AND ANY H5_X=2: H10; IF 3RD ITER. AND NO H5_X=1 OR 2 AND ANY H5_X=3: H13]
- 1. RF [H5_X; IF 3RD ITER. AND ANY H5_X=1: H6; IF 3RD ITER. AND NO H5_X=1 AND ANY H5_X=2: H10; IF 3RD ITER. AND NO H5_X=1 OR 2 AND ANY H5_X=3: H13]

H6. About how much are the payments on the {Text fill: If H5_2=1(YES): "first"} mortgage or land contract?
{If nothing, enter 0 in amount}

US\$ _____{7-digits}[H6A; If H6=0:H8]

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- 2. DK [H8]
- 1. RF [H8]

H6A. PER:

- 1. WEEK [H7]
- 2. TWICE A MONTH [H7]
- 3. MONTH [H7]
- 4. QUARTER [H7]
- 5. SIX MONTHS [H7]
- 6. YEAR [H7]
- 7. ACADEMIC SEMESTER [H7]
- 8. ACADEMIC QUARTER [H7]
- 9. ACADEMIC YEAR [H7]
- 97. Other [H6B]

H6B. (specify) _____ {80 characters}[H7]

- 2. DK [H7]
- 1. RF [H7]

H7. Do the payments include property taxes or insurance?
(Which?)

- 1. TAXES ONLY [H8]
- 2. INSURANCE ONLY [H8]
- 3. BOTH [H8]
- 4. NO, NEITHER [H8]
- 2. DK [H8]
- 1. RF [H8]

H8. About how much do you still owe on the mortgage or land contract?
[IWER: DO NOT PROBE DK]
{If nothing, enter 0 in amount}

US\$ _____ {8-digits}[H10; If H8=0: H10]

- 2. DK [H9A]
- 1. RF [H9A]

H9A. Does it amount to less than \$20,000, more than \$20,000, or what?

- 1. LESS THAN \$20,000 [H9C]
- 2. ABOUT \$20,000 [H10]
- 3. MORE THAN \$20,000 [H9B]
- 2. DK [H10]
- 1. RF [H10]

H9B. Does it amount to less than \$100,000, more than \$100,000, or what?

- 1. LESS THAN \$100,000 [H10]
- 2. ABOUT \$100,000 [H10]
- 3. MORE THAN \$100,000 [H10]
- 2. DK [H10]
- 1. RF [H10]

H9C. Does it amount to less than \$5,000, more than \$5,000, or what?

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- 1. LESS THAN \$5,000 [H10]
- 2. ABOUT \$5,000 [H10]
- 3. MORE THAN \$5,000 [H10]
- 2. DK [H10]
- 1. RF [H10]

H10. **{IF R DID NOT REPORT THAT R HAS SECOND MORTGAGE (H5 DOES NOT INCLUDE 2), GO TO H13}**

About how much are the payments on that second mortgage?

{If nothing, enter 0 in amount}

US\$ _____ {7-digits}[H10A; If H10=0: H11]

- 2. DK [H11]
- 1. RF [H11]

H10A. PER:

- 1. WEEK [H11]
- 2. TWICE A MONTH [H11]
- 3. MONTH [H11]
- 4. QUARTER [H11]
- 5. SIX MONTHS [H11]
- 6. YEAR [H11]
- 7. ACADEMIC SEMESTER [H11]
- 8. ACADEMIC QUARTER [H11]
- 9. ACADEMIC YEAR [H11]
- 97. Other [H10B]

H10B. (specify) _____ {80 characters}[H11]

- 2. DK [H11]
- 1. RF [H11]

H11. About how much do you still owe on that second mortgage?

[IWER: DO NOT PROBE DK]

{If nothing, enter 0 in amount}

US\$ _____ {8-digits}[H13; If H11=0: H13]

- 2. DK [H12A]
- 1. RF [H12A]

H12A. Does it amount to less than \$20,000, more than \$20,000, or what?

- 1. LESS THAN \$20,000 [H12C]
- 2. ABOUT \$20,000 [H13]
- 3. MORE THAN \$20,000 [H12B]
- 2. DK [H13]
- 1. RF [H13]

H12B. Does it amount to less than \$100,000, more than \$100,000, or what?

- 1. LESS THAN \$100,000 [H13]
- 2. ABOUT \$100,000 [H13]
- 3. MORE THAN \$100,000 [H13]
- 2. DK [H13]
- 1. RF [H13]

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H12C. Does it amount to less than \$5,000, more than \$5,000, or what?

1. LESS THAN \$5,000 [H13]
2. ABOUT \$5,000 [H13]
3. MORE THAN \$5,000 [H13]
- 2. DK [H13]
- 1. RF [H13]

H13. **{IF R DID NOT REPORT THAT R HAS OTHER LOANS (H5 DOES NOT INCLUDE 3), GO TO H16}**

About how much are the payments on all of these other loans?

{If nothing, enter 0 in amount}

US\$ _____ {7-digits}[H13A; If H13=0: H14]

- 2. DK [H14]
- 1. RF [H14]

H13A. PER:

1. WEEK [H14]
2. TWICE A MONTH [H14]
3. MONTH [H14]
4. QUARTER [H14]
5. SIX MONTHS [H14]
6. YEAR [H14]
7. ACADEMIC SEMESTER [H14]
8. ACADEMIC QUARTER [H14]
9. ACADEMIC YEAR [H14]
97. Other [H13B]

H13B. (specify) _____ {80 characters}[H14]

- 2. DK [H14]
- 1. RF [H14]

H14. About how much do you still owe on all of these other loans?

[IWER: DO NOT PROBE DK]

{If nothing, enter 0 in amount}

US\$ _____ {8-digits}[H16; If H14=0: H16]

- 2. DK [H15A]
- 1. RF [H15A]

H15A. Does it amount to less than \$20,000, more than \$20,000, or what?

1. LESS THAN \$20,000 [H15C]
2. ABOUT \$20,000 [H16]
3. MORE THAN \$20,000 [H15B]
- 2. DK [H16]
- 1. RF [H16]

H15B. Does it amount to less than \$100,000, more than \$100,000, or what?

1. LESS THAN \$100,000 [H16]
2. ABOUT \$100,000 [H16]
3. MORE THAN \$100,000 [H16]

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- 2. DK [H16]
- 1. RF [H16]

H15C. Does it amount to less than \$5,000, more than \$5,000, or what?

- 1. LESS THAN \$5,000 [H16]
- 2. ABOUT \$5,000 [H16]
- 3. MORE THAN \$5,000 [H16]
- 2. DK [H16]
- 1. RF [H16]

H16. Do you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} have a home equity line of credit?

DEFINITION: A HOME EQUITY LINE OF CREDIT IS A LINE OF CREDIT OBTAINED BY USING THE EQUITY IN ONE'S HOME AS SECURITY.

- 1. YES [H17]
- 2. NO [H20]
- 2. DK [H20]
- 1. RF [H20]

H17. What is the maximum amount you could borrow on this line of credit?
{If nothing, enter 0 in amount}

US\$ _____ {8-digits}[H18; If H17=0: H20]

- 2. DK [H18]
- 1. RF [H18]

H18. Do you currently have a loan against this line of credit?

- 1. YES [H19]
- 2. NO [H20]
- 2. DK [H20]
- 1. RF [H20]

H19. About how much is currently owed on this loan?
{If nothing, enter 0 in amount and skip to H20}

US\$ _____ {8-digits}[H20]

- 2. DK [H20]
- 1. RF [H20]

H20. What was the purchase price of this home?
[IWER: IF R SAYS GIFT OR INHERITANCE, ASK VALUE WHEN RECEIVED]
{If nothing, enter 0 in amount}

US\$ _____ {8-digits}[H21; If H20=0: H21]

- 2. DK [H21]
- 1. RF [H21]

H21. In what year did you acquire it?

_____ YEAR {4-digits; check: DOB - present}[H26]

- 2. DK [H26]
- 1. RF [H26]

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H22. About how much rent do you pay?
{If nothing, enter 0 in amount}

US\$ _____ {7-digits}[H22A; If H22=0: H24]

-2. DK [H23A]

-1. RF [H23A]

H22A. PER:

1. WEEK [H24]

2. TWICE A MONTH [H24]

3. MONTH [H24]

4. QUARTER [H24]

5. SIX MONTHS [H24]

6. YEAR [H24]

7. ACADEMIC SEMESTER [H24]

8. ACADEMIC QUARTER [H24]

9. ACADEMIC YEAR [H24]

97. Other [H22B]

H22B. (specify) _____ {80 characters}[H24]

-2. DK [H24]

-1. RF [H24]

H23A. Does it amount to less than \$500 per month, more than \$500, or what?

1. LESS THAN \$500 [H23C]

2. ABOUT \$500 [H24]

3. MORE THAN \$500 [H23B]

-2. DK [H24]

-1. RF [H24]

H23B. Does it amount to less than \$1,000 per month, more than \$1,000, or what?

1. LESS THAN \$1,000 [H24]

2. ABOUT \$1,000 [H24]

3. MORE THAN \$1,000 [H24]

-2. DK [H24]

-1. RF [H24]

H23C. Does it amount to less than \$200 per month, more than \$200, or what?

1. LESS THAN \$200 [H24]

2. ABOUT \$200 [H24]

3. MORE THAN \$200 [H24]

-2. DK [H24]

-1. RF [H24]

H24. Do you rent it furnished or unfurnished?

1. FURNISHED [H25]

2. [VOL] PARTIALLY FURNISHED [H25]

3. UNFURNISHED [H25]

-2. DK [H25]

-1. RF [H25]

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H25. Are heat and electricity included in your rent?
[IWER: PROBE FOR WHICH]

- 1. YES, BOTH [H26]
- 2. HEAT ONLY [H26]
- 3. ELECTRICITY ONLY [H26]
- 4. NO, NEITHER [H26]
- 2. DK [H26]
- 1. RF [H26]

H26. Is your current {Text fill: If H1=1, 7, 8, 9, 97, -2, -1: "home"}{Text fill: If H1=2: "apartment"} {Text fill: If H1=3,4,6: "residence") part of a public or subsidized housing complex?

- 1. YES [H27]
- 2. NO [H27]
- 2. DK [H27]
- 1. RF [H27]

H27. Is your {Text fill: If H1=1, 7, 8, 9, 97, -2, -1: "home"}{Text fill: If H1=2: "apartment"} {Text fill: If H1=3,4,6: "residence") owned or partially owned by a relative or relatives {Text fill: IF A52=1 OR 2: "other than your" husband/wife/partner/spouse or partner}?

- 1. YES [H28]
- 2. NO [H31]
- 2. DK [H31]
- 1. RF [H31]

H28. What percent of this home is owned by a relative or relatives {Text fill: IF A52=1 OR 2: "other than your" husband/wife/partner/spouse or partner}?

PERCENT _____ {3-digits, soft check: <= 100}[H29]
-2. DK [H29]
-1. RF [H29]

H29. Who is this person? Is it someone you've already told us about? If there is more than one owner, please tell me about the principal owner.
{List the ID number of all relatives as listed in the Non-resident or CO-resident rosters. Give IWER ability to add relatives to the list.}

{SELECT NAME FROM ROSTER} [H30; IF NAME NOT ON ROSTER: H29A]
-1. REFUSED [H29A]
-2. DON'T KNOW [H29A]

H29A. Could you please give me the full name of this person, starting with the family name?

(_____) [MAX RANGE=40] 1 [H29B]
REFUSED.....-1 [H29B]
DON'T KNOW.....-2 [H29B]

H29B. What is that person's given, or first name

(_____) [MAX RANGE=40] 1 [H29E]
REFUSED.....-1 [H29E]
DON'T KNOW.....-2 [H29E]

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H29E. What is [name fill from H29B; IF H29B=-1,-2 / this person]'s relationship to you?

[RELATIONSHIP PICK LIST][H29G]

- OTHER SPECIFY 97 [H29F]
- REFUSED -1 [H29G]
- DON'T KNOW -2 [H29G]

H29F. OTHER (SPECIFY) (_____) [MAX RANGE=30] [H29G]

- REFUSED -1 [H29G]
- DON'T KNOW -2 [H29G]

H29G. CODE FROM H29E IF POSSIBLE. OTHERS: INTERVIEWER: IF NECESSARY. I can't always tell from a name, is [name fill from H29B; IF H29B=-1,-2 / this person] male or female?

- MALE 1 [H29H]
- FEMALE 2 [H29H]
- REFUSED -1 [H29H]
- DON'T KNOW -2 [H29H]

H29H. In what year was [name fill from H29B; IF H29B=-1,-2 / this person] born?

YEAR: #### [SOFT CHECK RANGE: 1890 TO PRESENT] [H29I]

- REFUSED -1 [H29I]
- DON'T KNOW -2 [H29I]

H29I. In what country was [he/she/he or she] born?

[COUNTRY PICKLIST]

[H30]

- OTHER SPECIFY 1 [H29J]
- REFUSED -1 [H30]
- DON'T KNOW -2 [H30]

H29J. OTHER SPECIFY (_____) [MAX=30] [H30]

- REFUSED -1 [H30]
- DON'T KNOW -1 [H30]

H30. Does that {Text fill: H29 RELATIVE} also live in this {Text fill: If H1=1, 7, 8, 9, 97, -2, -1: "home"}{Text fill: If H1=2: "apartment"} {Text fill: If H1=3,4,6: "residence"}?

- 1. YES [H31]
- 2. NO [H31]
- 2. DK [H31]
- 1. RF [H31]

Time Stamp

H31. Not including investment property and this home you are now living in, do you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} own a second home or condo? Please include time-share weeks.

- 1. YES [H32]
- 2. NO [H49]
- 2. DK [H49]
- 1. RF [H49]

H32. How many other homes do you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} own?

_____ {2-digits}{check: 1<=#<=10 homes}[H33]

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- 2. DK [H49]
- 1. RF [H49]

{Specify number of homes and then do sequence H33 through H46 for each additional home}

H33_XX. **{MAX LOOP ITERATIONS = 10}** In what country is your {Text fill: IF FIRST ITERATION: "second"}{Text fill: IF ITERATION 2 TO 10: "next"} home located?

COUNTRY_____ {Pick list, US first}{If US, skip to H34}{If OTHER, H33A}{If not US and not OTHER, H35}

- 1. NO MORE HOMES [H48]
- 2. DK [H35]
- 1. RF [H35]

H33A_XX. COUNTRY (other specify)_____ {30 characters}[H35]

- 2. DK [H35]
- 1. RF [H35]

H34_XX. In what state is it located?

STATE CODE: (__) **{MAX =2}** [H35]

- 2. DK [H35]
- 1. RF [H35]

H35_XX. About how many weeks a year do you use it?

#_____ {2-digits}{check: <= 52}[H36]

- 2. DK [H36]
- 1. RF [H36]

H36_XX. In what year did you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} acquire it?

_____ YEAR {4-digits; check: DOB - present}[H37]

- 2. DK [H37]
- 1. RF [H37]

H37_XX. Do you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} own all of it, part of it, or timeshares in it?

- 1. ALL [H39]
- 2. PART [H38]
- 3. TIMESHARE [H38]
- 2. DK [H38]
- 1. RF [H38]

H38_XX. What percent do you {Text fill IF A52=1 OR 2: "and your" husband/wife/partner/spouse or partner} own?

PERCENT_____ {3-digits, soft check: <= 100}[H39]

- 2. DK [H39]
- 1. RF [H39]

H39_XX. What was the purchase price {Text fill: If H37 not 1: "of the part that you own"}?

[IWER: IF OWNS PART OR TIMESHARES, ASK PURCHASE PRICE OF R'S SHARE. IF R SAYS GIFT OR INHERITANCE, ASK VALUE WHEN RECEIVED.]

{If nothing, enter 0 in amount}

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US\$ _____{8-digits}[H40; If H39=0: H40]

- 2. DK [H40]
- 1. RF [H40]

H40_XX. What is {Text fill: If H37 = 1: "its present value"} {Text fill: If H37 not 1: "the present value of your part of it"}? I mean, about what would it bring if it were sold today?

[IWER: DO NOT PROBE DK]
{If nothing, enter 0 in amount}

US\$ _____{8-digits}[H42; If H40=0: H42]

- 2. DK [H41A]
- 1. RF [H41A]

H41A_XX. Would it amount to less than \$50,000, more than \$50,000, or what?

- 1. LESS THAN \$50,000 [H41D]
- 2. ABOUT \$50,000 [H42]
- 3. MORE THAN \$50,000 [H41B]
- 2. DK [H42]
- 1. RF [H42]

H41B_XX. Would it amount to less than \$150,000, more than \$150,000, or what?

- 1. LESS THAN \$150,000 [H42]
- 2. ABOUT \$150,000 [H42]
- 3. MORE THAN \$150,000 [H41C]
- 2. DK [H42]
- 1. RF [H42]

H41C_XX. Would it amount to less than \$500,000, more than \$500,000, or what?

- 1. LESS THAN \$500,000 [H42]
- 2. ABOUT \$500,000 [H42]
- 3. MORE THAN \$500,000 [H42]
- 2. DK [H42]
- 1. RF [H42]

H41D_XX. Would it amount to less than \$15,000, more than \$15,000, or what?

- 1. LESS THAN \$15,000 [H42]
- 2. ABOUT \$15,000 [H42]
- 3. MORE THAN \$15,000 [H42]
- 2. DK [H42]
- 1. RF [H42]

H42_XX. {PROGRAM WILL DISPLAY QUESTION TEXT ON H42_1 SCREEN. FOR H42_2 AND H42_3 SCREENS, A NOTE WILL BE DISPLAYED TO THE INTERVIEWER: CODE ANY ADDITIONAL LOANS REPORTED BY R}

(When X=1: Do you have a mortgage or land contract on this property?) (When X=2: Do you have a second mortgage?) (When X=3: Do you have any other loan that uses this property as collateral? Please do not include home equity lines of credit.)

[IWER: IF R SAYS THEY REFINANCED THE MORTGAGE, TREAT IT AS A MORTGAGE]

- 1. [H42_XX_1] YES, MORTGAGE/LAND CONTRACT [H43]
- 2. [H42_XX_2] YES, SECOND MORTGAGE [H43]
- 3. [H42_XX_3] YES, OTHER LOANS [H43]
- 2. DK [NEXT HOME OR H47]

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-1. RF [NEXT HOME OR H47]

H43_XX. Taking all mortgages together, about how much do you owe on {Text fill: IF FIRST ITERATION: "your second"}{Text fill: IF ITERATION 2 TO 10: "this"} home?
{If nothing, enter 0 in amount}

US\$ _____{8-digits}[H45; If H43=0: H45]

- 2. DK [H44A]
- 1. RF [H44A]

H44A_XX. Does it amount to less than \$20,000, more than \$20,000, or what?

- 1. LESS THAN \$20,000 [H44C]
- 2. ABOUT \$20,000 [H45]
- 3. MORE THAN \$20,000 [H44B]
- 2. DK [H45]
- 1. RF [H45]

H44B_XX. Does it amount to less than \$100,000, more than \$100,000, or what?

- 1. LESS THAN \$100,000 [H45]
- 2. ABOUT \$100,000 [H45]
- 3. MORE THAN \$100,000 [H45]
- 2. DK [H45]
- 1. RF [H45]

H44C_XX. Does it amount to less than \$5,000, more than \$5,000, or what?

- 1. LESS THAN \$5,000 [H45]
- 2. ABOUT \$5,000 [H45]
- 3. MORE THAN \$5,000 [H45]
- 2. DK [H45]
- 1. RF [H45]

H45_XX. Taking all mortgages, about how much are the payments on this {Text fill: IF FIRST ITERATION: "second"}{Text fill: IF ITERATION 2 TO 10: ""} home?
{If nothing, enter 0 in amount}

US\$ _____{7-digits}[H45A; If H45=0: NEXT HOME OR H47]

- 2. DK [H46]
- 1. RF [H46]

H45A_XX. PER:

- 1. WEEK [H46]
- 2. TWICE A MONTH [H46]
- 3. MONTH [H46]
- 4. QUARTER [H46]
- 5. SIX MONTHS [H46]
- 6. YEAR [H46]
- 97. Other [H45B]

H45B_XX. (specify) _____ {80 characters}

- 2. DK [H46]
- 1. RF [H46]

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H46_XX. Do the payments include property taxes or insurance?
(Which?)

1. TAXES ONLY [NEXT H32 HOME OR H47]
2. INSURANCE ONLY [NEXT H32 HOME OR H47]
3. BOTH [NEXT H32 HOME OR H47]
4. NO, NEITHER [NEXT H32 HOME OR H47]
- 2. DK [NEXT H32 HOME OR H47]
- 1. RF [NEXT H32 HOME OR H47]

H47_XX. Are there any other homes?

1. YES [H33]
2. NO [H49]
- 2. DK [H49]
- 1. RF [H49]

Time Stamp

H49. Savings and investments are an important part of family finances. The next questions ask about a number of different kinds of savings or investments you may have.

Do you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} have any real estate {Text fill: If (H1A=1 OR H1A=2) AND H32=1: "other than your main home or second home"}{H1A=1 OR H1A=2) AND H32>1: "other than your main home or second homes"}{Text fill: If H1A=1 OR 2 AND H31 NOT 1: "other than your main home"}, such as land, rental real estate, a partnership, or money owed to you on a land contract or mortgage?

1. YES [H50]
2. [VOL] YES, MORE THAN ONE [H50]
3. NO [H68]
- 2. DK [H68]
- 1. RF [H68]

H50. Is any of this real estate located in the United States?

1. YES [H51]
2. NO [H52]
- 2. DK [H52]
- 1. RF [H52]

H51_X. What is the state in which it is located?

STATE CODE: (__) [MAX =2] {Allow up to three}[H51A_X OR H52]

- 2. DK [H52]
- 1. RF [H52]

H51A_X. ANY OTHER STATES REPORTED?

1. YES [H51]
2. NO [H52]

H52. Is any of this real estate located outside of the United States?

1. YES [H53]
2. NO [H54]

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- 2. DK [H54]
- 1. RF [H54]

H53_X. What is the country in which it is located?

COUNTRY_____ {Pick list: allow up to three}{H54; If OTHER, H53A}

- 2. DK [H54]
- 1. RF [H54]

H53A_X. COUNTRY (other specify)_____ {30 characters}[H54]

- 2. DK [H54]
- 1. RF [H54]

H54_X. {Repeat question H54 through H61C first If H50=1 and then If H52=1}

If you sold all of your {Text fill: United States/foreign} real estate of this type and then paid off any debts on it, about how much would you get?

[IWER: DO NOT PROBE DK/RF]

[INTERVIEWER: IF ACTUAL RESPONSE IS "-1" OR "-2" PLEASE OPEN COMMENT BOX AND NOTE THIS]

{Can be < 0}

\$_____ {15-digits}[H54A_X]

- 2. DK [ASSIGN RANDOM #1-3: H55A/RANDOM ASSIGNMENT]
- 1. RF [ASSIGN RANDOM #1-3: H55A/RANDOM ASSIGNMENT]

H54A_X. Currency_____

{Pick list, US\$ first; allow only one choice}{H56; If OTHER, H54B}

H54B_X. Currency (other specify)_____ {30 characters}[H56]

RANDOM ASSIGNMENT 1:

H55A_X. Would it amount to less than \$2,500, more than \$2,500, or what?

- 1. LESS THAN \$2,500 [H56]
- 3. ABOUT \$2,500 [H56]
- 5. MORE THAN \$2,500 [H55B]
- 2. DK [H56]
- 1. RF [H56]

H55B_X. Would it amount to less than \$125,000, more than \$125,000, or what?

- 1. LESS THAN \$125,000 [H56]
- 3. ABOUT \$125,000 [H56]
- 5. MORE THAN \$125,000 [H55C]
- 2. DK [H56]
- 1. RF [H56]

H55C_X. Would it amount to less than \$500,000, more than \$500,000, or what?

- 1. LESS THAN \$500,000 [H56]
- 3. ABOUT \$500,000 [H56]
- 5. MORE THAN \$500,000 [H55D]
- 2. DK [H56]
- 1. RF [H56]

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H55D_X. Would it amount to less than \$1,000,000, more than \$1,000,000, or what?

- 1. LESS THAN \$1,000,000 [H56]
- 3. ABOUT \$1,000,000 [H56]
- 5. MORE THAN \$1,000,000 [H56]
- 2. DK [H56]
- 1. RF [H56]

RANDOM ASSIGNMENT 2:

H55B_X. Would it amount to less than \$125,000, more than \$125,000, or what?

- 1. LESS THAN \$125,000 [H55A]
- 3. ABOUT \$125,000 [H56]
- 5. MORE THAN \$125,000 [H55C]
- 2. DK [H56]
- 1. RF [H56]

H55C_X. Would it amount to less than \$500,000, more than \$500,000, or what?

- 1. LESS THAN \$500,000 [H56]
- 3. ABOUT \$500,000 [H56]
- 5. MORE THAN \$500,000 [H55D]
- 2. DK [H56]
- 1. RF [H56]

H55D_X. Would it amount to less than \$1,000,000, more than \$1,000,000, or what?

- 1. LESS THAN \$1,000,000 [H56]
- 3. ABOUT \$1,000,000 [H56]
- 5. MORE THAN \$1,000,000 [H56]
- 2. DK [H56]
- 1. RF [H56]

H55A_X. Would it amount to less than \$2,500, more than \$2,500, or what?

- 1. LESS THAN \$2,500 [H56]
- 3. ABOUT \$2,500 [H56]
- 5. MORE THAN \$2,500 [H56]
- 2. DK [H56]
- 1. RF [H56]

RANDOM ASSIGNMENT 3:

H55C_X. Would it amount to less than \$500,000, more than \$500,000, or what?

- 1. LESS THAN \$500,000 [H55B]
- 3. ABOUT \$500,000 [H56]
- 5. MORE THAN \$500,000 [H55D]
- 2. DK [H56]
- 1. RF [H56]

H55D_X. Would it amount to less than \$1,000,000, more than \$1,000,000, or what?

- 1. LESS THAN \$1,000,000 [H56]

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- 3. ABOUT \$1,000,000 [H56]
- 5. MORE THAN \$1,000,000 [H56]
- 2. DK [H56]
- 1. RF [H56]

H55B_X. Would it amount to less than \$125,000, more than \$125,000, or what?

- 1. LESS THAN \$125,000 [H55A]
- 3. ABOUT \$125,000 [H56]
- 5. MORE THAN \$125,000 [H56]
- 2. DK [H56]
- 1. RF [H56]

H55A_X. Would it amount to less than \$2,500, more than \$2,500, or what?

- 1. LESS THAN \$2,500 [H56]
- 3. ABOUT \$2,500 [H56]
- 5. MORE THAN \$2,500 [H56]
- 2. DK [H56]
- 1. RF [H56]

H56_X. Do you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} currently receive any income or rent from your {Text fill: United States /foreign} {Text fill: If H49=1: "property"} {Text fill: If H49=2 "properties"}?

- 1. YES [H57]
- 2. NO [IF H52=1: H54_2; IF H52 NOT 1: H62]
- 2. DK [IF H52=1: H54_2; IF H52 NOT 1: H62]
- 1. RF [IF H52=1: H54_2; IF H52 NOT 1: H62]

H57_X. How often do you receive that?

- 1. WEEKLY [H58]
- 2. TWICE A MONTH [H58]
- 3. MONTHLY [H58]
- 4. QUARTERLY [H58]
- 5. SIX MONTHS [H58]
- 6. YEARLY [H60]
- 97. OTHER [H57A]
- 2. DK [H60]
- 1. RF [H60]

H57A_X. (specify)_____ {80 characters}[H60]

- 2. DK [H60]
- 1. RF [H60]

H58_X. Before any expenses or deductions, about how much did you receive {Text fill: If H57_X=2 or 5: "in the"} last {Text fill: If H57_X=1: "week"; If H57_X=2: "two weeks"; If H57_X=3: "month"; If H57_X=4 "quarter"; If H57_X=5 "six months"; If H57_X=6: "year"} from that?
[IWER: DO NOT PROBE DK]

_____ {15-digits}[H58B_X]

- 2. DK [H59]
- 1. RF [H59]

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H58B_X. {IF H50=1 AND H52=1: US THEN FOREIGN PROPERTIES; IF H50=1 AND X=1, AUTOMATICALLY CODE US DOLLARS AND SKIP TO H59}

Currency_____

{Pick list, US\$ first; allow only one choice}{H59; If OTHER, H58C}

- 2. DK [H59]
- 1. RF [H59]

H58C_X. Currency (other specify)_____ {30 characters}[H59]

- 2. DK [H59]
- 1. RF [H59]

H59_X. Do you get about the same amount each {Text fill: If H57_X=1: "week"; If H57_X=2: "two weeks"; If H57_X=3: "month"; If H57_X=4 "quarter"; If H57_X=5 "six months"; If H57_X=6: "year"}?

- 1. YES [IF H52=1: H54_2; IF H52 NOT 1: H62]
- 2. NO [H60]
- 2. DK [H60]
- 1. RF [H60]

H60_X. Before any expenses or deductions, about how much did you receive from this rental income in the last twelve months?

[IWER: DO NOT INCLUDE RENTAL INCOME FROM A BUSINESS OR FARM R OWNS.]

[IWER: DO NOT PROBE DK]

_____ {15-digits}[H60B_X]

- 2. DK [H61A]
- 1. RF [H61A]

H60B_X. {IF H50=1 AND H52=1: US THEN FOREIGN PROPERTIES; IF H50=1 AND X=1, AUTOMATICALLY CODE US DOLLARS AND SKIP TO [IF H52=1: H54_2; IF H52 NOT 1: H62]}

Currency_____

{Pick list, US\$ first; allow only one choice}{[IF H52=1: H54_2; IF H52 NOT 1: H62]; If OTHER, H60C}

H60C_X. Currency (other specify)_____ {30 characters}[IF H52=1: H54_2; IF H52 NOT 1: H62]

H61A_X. Did it amount to less than \$50,000, more than \$50,000, or what?

- 1. LESS THAN \$50,000 [H61C]
- 2. ABOUT \$50,000 [IF H52=1: H54_2; IF H52 NOT 1: H62]
- 3. MORE THAN \$50,000 [H61B]
- 2. DK [IF H52=1: H54_2; IF H52 NOT 1: H62]
- 1. RF [IF H52=1: H54_2; IF H52 NOT 1: H62]

H61B_X. Did it amount to less than \$75,000, more than \$75,000, or what?

- 1. LESS THAN \$75,000 [IF H52=1: H54_2; IF H52 NOT 1: H62]
- 2. ABOUT \$75,000 [IF H52=1: H54_2; IF H52 NOT 1: H62]
- 3. MORE THAN \$75,000 [IF H52=1: H54_2; IF H52 NOT 1: H62]
- 2. DK [IF H52=1: H54_2; IF H52 NOT 1: H62]
- 1. RF [IF H52=1: H54_2; IF H52 NOT 1: H62]

H61C_X. Did it amount to less than \$25,000, more than \$25,000, or what?

- 1. LESS THAN \$25,000 [IF H52=1: H54_2; IF H52 NOT 1: H62]

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- 2. ABOUT \$25,000 [IF H52=1: H54_2; IF H52 NOT 1: H62]
- 3. MORE THAN \$25,000 [IF H52=1: H54_2; IF H52 NOT 1: H62]
- 2. DK [IF H52=1: H54_2; IF H52 NOT 1: H62]
- 1. RF [IF H52=1: H54_2; IF H52 NOT 1: H62]

H62. {If H1A=1 or If H32>0 or both, then questions H62 through H67C}

Do you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} currently receive any rent from your {Text fill: If H1A=1 AND H32=2, -2, OR -1, or if H1A=1 AND H32 is not answered: "own home"} {Text fill: If H32=1: "second home"}{Text fill: If H32>1: "second homes"}{Text fill: If H1A=1 AND If H32=1: "own home or your second home"}{Text fill: If H1A=1 AND If H32>1: "own home or your second homes"}?

- 1. YES [H63]
- 2. NO [H68]
- 2. DK [H68]
- 1. RF [H68]

H63. How often do you receive that?

- 1. WEEKLY [H64]
- 2. TWICE A MONTH [H64]
- 3. MONTHLY [H64]
- 4. QUARTERLY [H64]
- 5. SIX MONTHS [H64]
- 6. YEARLY [H66]
- 97. Other [H63A]
- 2. DK [H66]
- 1. RF [H66]

H63A. (specify)_____ {80 characters}[H64]

- 2. DK [H66]
- 1. RF [H66]

H64. Before any expenses or deductions, about how much did you receive {Text fill: If H63=2 or 5: "in the"} last {Text fill: If H63=1: "week"; If H63=2: "two weeks"; If H63=3: "month"; If H63=4 "quarter"; If H63=5 "six months"; If H63=6: "year"; If H63_X=97: PERIOD FROM H63a;} from that?
[IWER: DO NOT PROBE DK]

\$_____ {15-digits}[H64A]

- 2. DK [H65]
- 1. RF [H65]

H64A. Currency_____ {Pick list, US\$ first; allow only one choice}{H65; If OTHER, H64B}

H64B. Currency (other specify)_____ {30 characters}[H65]

H65. Do you get about the same amount each {Text fill: If H63=1: "week"; If H63=2: "two weeks"; If H63=3: "month"; If H63=4 "quarter"; If H63=5 "six months"; If H63=6: "year"; If H57A_X=97: PERIOD FROM H63a;}?

- 1. YES [H68]
- 2. NO [H66]
- 2. DK [H66]
- 1. RF [H66]

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H66. Before any expenses or deductions, about how much did you receive from this rental income in the last twelve months?

[IWER: DO NOT INCLUDE RENTAL INCOME FROM A BUSINESS OR FARM R OWNS.]

[IWER: DO NOT PROBE DK]

\$ _____ {15-digits} [H66A]

-2. DK [H67A]

-1. RF [H67A]

H66A. Currency _____

{Pick list, US\$ first; allow only one choice}{H68; If OTHER, H66B}

H66B. Currency (other specify) _____ {30 characters}[H68]

H67A. Did it amount to less than \$50,000, more than \$50,000, or what?

1. LESS THAN \$50,000 [H67C]

2. ABOUT \$50,000 [H68]

3. MORE THAN \$50,000 [H67B]

-2. DK [H68]

-1. RF [H68]

H67B. Did it amount to less than \$75,000, more than \$75,000, or what?

1. LESS THAN \$75,000 [H68]

2. ABOUT \$75,000 [H68]

3. MORE THAN \$75,000 [H68]

-2. DK [H68]

-1. RF [H68]

H67C. Did it amount to less than \$25,000, more than \$25,000, or what?

1. LESS THAN \$25,000 [H68]

2. ABOUT \$25,000 [H68]

3. MORE THAN \$25,000 [H68]

-2. DK [H68]

-1. RF [H68]

Time Stamp

H68. Do you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} own part or all of a business or farm?

1. YES [H69]

2. [VOL] YES, MORE THAN ONE [H69]

3. NO [H91]

-2. DK [H91]

-1. RF [H91]

H69. How many farms and businesses do you own?

_____ {2-digits}{check: <= 10}[H70]

-2. DK [H90]

-1. RF [H90]

{Specify number and then do questions H70 to H89 for each farm and business.}

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H70_XX. **{MAX LOOP ITERATIONS = 10}** Now I would like to ask you about the {Text fill: H69 NUMBER > 1, first/second/third/fourth/fifth/sixth/seventh/eighth/ninth/tenth} business or farm that you own. In what country is it located?

COUNTRY _____{Pick list, US first}{If US, skip to H71}{If OTHER, H70A}

- 2. DK [H72]
- 1. RF [H72]

H70A_XX. COUNTRY (other specify) _____{30 characters}[H72]

- 2. DK [H72]
- 1. RF [H72]

H71_XX. In what state is it located?

STATE CODE: (__) **{MAX =2}** [H72]

- 2. DK [H72]
- 1. RF [H72]

H72_XX. What industry would you say this business or farm is in?
_____ {80 characters}[H73]

H73_XX. What goods and services does this business or farm provide?
_____ {80 characters}[H74]

H74_XX. Do you {Text fill: "or your" husband/wife/partner/spouse or partner} own this business {Text fill: IF A52 IS NOT 1 OR 2: "by yourself"} {Text fill: IF A52=1 OR 2: "yourselves"} or with others?

- 1. SELF [H77]
- 2. WITH OTHERS [H75]
- 2. DK [H77]
- 1. RF [H77]

H75_XX. Is this a partnership?

- 1. YES [H76]
- 2. NO [H77]
- 2. DK [H77]
- 1. RF [H77]

H76_XX. How many partners are there in all?

_____{3-digits}[H77]

- 2. DK [H79]
- 1. RF [H79]

H77_XX. Is this a corporation?

- 1. YES [H78]
- 2. NO [H79]
- 2. DK [H79]
- 1. RF [H79]

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H78_XX. What percentage of shares do you own?

PERCENT _____{3-digits, soft check: <= 100}[H79]

-2. DK [H79]

-1. RF [H79]

H79_XX. What is the approximate value of the assets of this business or farm **that you own** (e.g., equipment, buildings) if you sold them today?

\$ _____{15-digits}[H79A_XX]

-2. DK [H80]

-1. RF [H80]

H79A_XX. Currency _____

{Pick list, US\$ first; allow only one choice}{H80; If OTHER, H79B}

H79B_XX. Currency (other specify) _____{30 characters}[H80]

H80_XX. If you sold the part of the business or farm you own and then paid off any debts on it, about how much would you get?

[IWER: DO NOT PROBE DK/RF]

[INTERVIEWER: IF ACTUAL RESPONSE IS "-1" OR "-2" PLEASE OPEN COMMENT BOX AND NOTE THIS]

{Can be < 0}

\$ _____{15-digits}[H80A_XX]

-2. DK [ASSIGN RANDOM #1-3: H81A/RANDOM ASSIGNMENT]

-1. RF [ASSIGN RANDOM #1-3: H81A/RANDOM ASSIGNMENT]

H80A_XX. Currency _____

{Pick list, US\$ first; allow only one choice}{If not OTHER, [H82]}

H80B_XX. Currency (other specify) _____{30 characters}[H82]

RANDOM ASSIGNMENT 1:

H81A_XX. Would it amount to less than \$5,000, more than \$5,000, or what?

1. LESS THAN \$5,000 [H82]

2. ABOUT \$5,000 [H82]

3. MORE THAN \$5,000 [H81B]

-2. DK [H82]

-1. RF [H82]

H81B_XX. Would it amount to less than \$10,000, more than \$10,000, or what?

1. LESS THAN \$10,000 [H82]

2. ABOUT \$10,000 [H82]

3. MORE THAN \$10,000 [H81C]

-2. DK [H82]

-1. RF [H82]

H81C_XX. Would it amount to less than \$100,000, more than \$100,000, or what?

1. LESS THAN \$100,000 [H82]

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- 2. ABOUT \$100,000 [H82]
- 3. MORE THAN \$100,000 [H81D]
- 2. DK [H82]
- 1. RF [H82]

H81D_XX. Would it amount to less than \$1,000,000, more than \$1,000,000, or what?

- 1. LESS THAN \$1,000,000 [H82]
- 2. ABOUT \$1,000,000 [H82]
- 3. MORE THAN \$1,000,000 [H82]
- 2. DK [H82]
- 1. RF [H82]

RANDOM ASSIGNMENT 2:

H81B_XX. Would it amount to less than \$10,000, more than \$10,000, or what?

- 1. LESS THAN \$10,000 [H81A]
- 2. ABOUT \$10,000 [H82]
- 3. MORE THAN \$10,000 [H81C]
- 2. DK [H82]
- 1. RF [H82]

H81C_XX. Would it amount to less than \$100,000, more than \$100,000, or what?

- 1. LESS THAN \$100,000 [H82]
- 2. ABOUT \$100,000 [H82]
- 3. MORE THAN \$100,000 [H81D]
- 2. DK [H82]
- 1. RF [H82]

H81D_XX. Would it amount to less than \$1,000,000, more than \$1,000,000, or what?

- 1. LESS THAN \$1,000,000 [H82]
- 2. ABOUT \$1,000,000 [H82]
- 3. MORE THAN \$1,000,000 [H82]
- 2. DK [H82]
- 1. RF [H82]

H81A_XX. Would it amount to less than \$5,000, more than \$5,000, or what?

- 1. LESS THAN \$5,000 [H82]
- 2. ABOUT \$5,000 [H82]
- 3. MORE THAN \$5,000 [H82]
- 2. DK [H82]
- 1. RF [H82]

RANDOM ASSIGNMENT 3:

H81C_XX. Would it amount to less than \$100,000, more than \$100,000, or what?

- 1. LESS THAN \$100,000 [H81B]
- 2. ABOUT \$100,000 [H82]
- 3. MORE THAN \$100,000 [H81D]
- 2. DK [H82]
- 1. RF [H82]

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H81D_XX. Would it amount to less than \$1,000,000, more than \$1,000,000, or what?

- 1. LESS THAN \$1,000,000 [H82]
- 2. ABOUT \$1,000,000 [H82]
- 3. MORE THAN \$1,000,000 [H82]
- 2. DK [H82]
- 1. RF [H82]

H81B_XX. Would it amount to less than \$10,000, more than \$10,000, or what?

- 1. LESS THAN \$10,000 [H81A]
- 2. ABOUT \$10,000 [H82]
- 3. MORE THAN \$10,000 [H82]
- 2. DK [H82]
- 1. RF [H82]

H81A_XX. Would it amount to less than \$5,000, more than \$5,000, or what?

- 1. LESS THAN \$5,000 [H82]
- 2. ABOUT \$5,000 [H82]
- 3. MORE THAN \$5,000 [H82]
- 2. DK [H82]
- 1. RF [H82]

H82_XX. Do you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} currently receive any income from your {Text fill: H69 NUMBER > 1; first/second/third/fourth/fifth/sixth/seventh/eighth/ninth/tenth} farm or business?

- 1. YES [H83]
- 2. NO [NEXT BUSINESS OR H91]
- 2. DK [NEXT BUSINESS OR H91]
- 1. RF [NEXT BUSINESS OR H91]

H83_XX. How often do you receive that?

- 1. WEEKLY [H84]
- 2. TWICE A MONTH [H84]
- 3. MONTHLY [H84]
- 4. QUARTERLY [H84]
- 5. SIX MONTHS [H84]
- 6. YEARLY [H86]
- 97. OTHER [H83A]

H83A_XX (specify) _____ {80 characters}[H84]

- 2. DK [H86]
- 1. RF [H86]

H84_XX. Before any expenses or deductions, about how much did you receive last {Text fill: PERIOD FROM H83_X OR H83A_X} from that?

[IWER: WE WANT THE AMOUNT BEFORE ANY DEDUCTIONS.]

[IWER: DO NOT PROBE DK]

\$ _____ {15-digits}[H84A_XX]

- 2. DK [H85]

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-1. RF [H85]

H84A_XX. Currency _____

{Pick list, US\$ first; allow only one choice}{H85; If OTHER, H84B}

H84B_XX. Currency (other specify) _____{30 characters}[H85]

H85_XX. Do you get about the same amount each {Text fill: PERIOD FROM H83_X OR H83A_X}?

1. YES [H88]

2. NO [H86]

-2. DK [H86]

-1. RF [H86]

H86_XX. Before any expenses or deductions, about how much did you receive from this farm or business in the last twelve months?

[IWER: WE WANT THE AMOUNT BEFORE ANY DEDUCTIONS.]

[IWER: DO NOT PROBE DK]

\$ _____{15-digits} [H86A_XX]

-2. DK [H87A]

-1. RF [H87A]

H86A_XX. Currency _____

{Pick list, US\$ first; allow only one choice}{H88; If OTHER, H86B}

H86B_XX. Currency (other specify) _____{30 characters}[H88]

H87A_XX. Did it amount to less than \$20,000, more than \$20,000, or what?

1. LESS THAN \$20,000 [H87C]

2. ABOUT \$20,000 [H88]

3. MORE THAN \$20,000 [H87B]

-2. DK [H88]

-1. RF [H88]

H87B_XX. Did it amount to less than \$50,000, more than \$50,000, or what?

1. LESS THAN \$50,000 [H88]

2. ABOUT \$50,000 [H88]

3. MORE THAN \$50,000 [H88]

-2. DK [H88]

-1. RF [H88]

H87C_XX. Did it amount to less than \$5,000, more than \$5,000, or what?

1. LESS THAN \$5,000 [H87D]

2. ABOUT \$5,000 [H88]

3. MORE THAN \$5,000 [H88]

-2. DK [H88]

-1. RF [H88]

H87D_XX. Did it amount to less than \$2,000, more than \$2,000, or what?

1. LESS THAN \$2,000 [H88]

2. ABOUT \$2,000 [H88]

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- 3. MORE THAN \$2,000 [H88]
- 2. DK [H88]
- 1. RF [H88]

H88_XX. Did you tell me about this income earlier in the interview?

- 1. YES [H89]
- 2. NO [H89]
- 2. DK [H89]
- 1. RF [H89]

H89_XX. How many people work full-time for this business?

_____{6-digits}[NEXT BUSINESS OR H90]

- 2. DK [NEXT BUSINESS OR H90]
- 1. RF [NEXT BUSINESS OR H90]

H90_XX. Are there any other farms or businesses?

- 1. YES [H70]
- 2. NO [H91]
- 2. DK [H91]
- 1. RF [H91]

Time Stamp

H91. Do you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} have any shares of stock or stock mutual funds?

- 1. YES [H92]
- 2. NO [H100]
- 2. DK [H100]
- 1. RF [H100]

H92. If you sold all those and paid off anything you owed on them, about how much would you have?

[IWER: DO NOT PROBE DK]

[INTERVIEWER: IF ACTUAL RESPONSE IS "-1" OR "-2" PLEASE OPEN COMMENT BOX AND NOTE THIS]

{Can be < 0}

\$ _____{8-digits}[H92A]

- 2. DK [ASSIGN RANDOM #1-3: H93A/RANDOM ASSIGNMENT]
- 1. RF [ASSIGN RANDOM #1-3: H93A/RANDOM ASSIGNMENT]

H92A. Currency _____

{Pick list, US\$ first; allow only one choice}{H94; If OTHER, H92B}

H92B. Currency (other specify) _____{30 characters}[H93]

RANDOM ASSIGNMENT 1:

H93A. Would it amount to less than \$2,500, more than \$2,500, or what?

- 1. LESS THAN \$2,500 [H94]
- 3. ABOUT \$2,500 [H94]
- 5. MORE THAN \$2,500 [H93B]

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- 2. DK [H94]
- 1. RF [H94]

H93B. Would it amount to less than \$25,000, more than \$25,000, or what?

- 1. LESS THAN \$25,000 [H94]
- 3. ABOUT \$25,000 [H94]
- 5. MORE THAN \$25,000 [H93C]
- 2. DK [H94]
- 1. RF [H94]

H93C. Would it amount to less than \$125,000, more than \$125,000, or what?

- 1. LESS THAN \$125,000 [H94]
- 3. ABOUT \$125,000 [H94]
- 5. MORE THAN \$125,000 [H93D]
- 2. DK [H94]
- 1. RF [H94]

H93D. Would it amount to less than \$400,000, more than \$400,000, or what?

- 1. LESS THAN \$400,000 [H94]
- 3. ABOUT \$400,000 [H94]
- 5. MORE THAN \$400,000 [H94]
- 2. DK [H94]
- 1. RF [H94]

RANDOM ASSIGNMENT 2:

H93B. Would it amount to less than \$25,000, more than \$25,000, or what?

- 1. LESS THAN \$25,000 [H93A]
- 3. ABOUT \$25,000 [H94]
- 5. MORE THAN \$25,000 [H93C]
- 2. DK [H94]
- 1. RF [H94]

H93C. Would it amount to less than \$125,000, more than \$125,000, or what?

- 1. LESS THAN \$125,000 [H94]
- 3. ABOUT \$125,000 [H94]
- 5. MORE THAN \$125,000 [H93D]
- 2. DK [H94]
- 1. RF [H94]

H93D. Would it amount to less than \$400,000, more than \$400,000, or what?

- 1. LESS THAN \$400,000 [H94]
- 3. ABOUT \$400,000 [H94]
- 5. MORE THAN \$400,000 [H94]
- 2. DK [H94]
- 1. RF [H94]

H93A. Would it amount to less than \$2,500, more than \$2,500, or what?

- 1. LESS THAN \$2,500 [H94]

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- 3. ABOUT \$2,500 [H94]
- 5. MORE THAN \$2,500 [H94]
- 2. DK [H94]
- 1. RF [H94]

RANDOM ASSIGNMENT 3:

H93C. Would it amount to less than \$125,000, more than \$125,000, or what?

- 1. LESS THAN \$125,000 [H93B]
- 3. ABOUT \$125,000 [H94]
- 5. MORE THAN \$125,000 [H93D]
- 2. DK [H94]
- 1. RF [H94]

H93D. Would it amount to less than \$400,000, more than \$400,000, or what?

- 1. LESS THAN \$400,000 [H94]
- 3. ABOUT \$400,000 [H94]
- 5. MORE THAN \$400,000 [H94]
- 2. DK [H94]
- 1. RF [H94]

H93B. Would it amount to less than \$25,000, more than \$25,000, or what?

- 1. LESS THAN \$25,000 [H93A]
- 3. ABOUT \$25,000 [H94]
- 5. MORE THAN \$25,000 [H94]
- 2. DK [H94]
- 1. RF [H94]

H93A. Would it amount to less than \$2,500, more than \$2,500, or what?

- 1. LESS THAN \$2,500 [H94]
- 3. ABOUT \$2,500 [H94]
- 5. MORE THAN \$2,500 [H94]
- 2. DK [H94]
- 1. RF [H94]

H94. Do these stocks or mutual funds pay any dividends or interest?

- 1. YES [H95]
- 2. NO [H100]
- 2. DK [H100]
- 1. RF [H100]

H95. How often is it paid?

- 1. ACCUMULATES/REINVEST [H98]
- 2. MONTHLY [H96]
- 3. QUARTERLY [H96]
- 4. SIX MONTHS [H96]
- 5. YEARLY [H98]
- 97. OTHER [H95A]
- 2. DK [H98]
- 1. RF [H98]

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H95A. (specify) _____ {80 characters}[H96]

-2. DK [H98]

-1. RF [H98]

H96. Before any expenses or deductions, about how much did you receive {Text fill: If H95=4: "in the"} last {Text fill: If H95=2: "month"; If H95=3: "quarter"; If H95=4: "six months"; If H95=97: PERIOD FROM H95A} from that?

[IWER: WE WANT THE AMOUNT BEFORE ANY DEDUCTIONS.]

[IWER: DO NOT PROBE DK]

_____ {15-digits}[H96A]

-2. DK [H97]

-1. RF [H97]

H96A. Currency _____

{Pick list, US\$ first; allow only one choice}{H97; If OTHER, H96B}

H96B. Currency (other specify) _____ {30 characters}[H97]

H97. Did you get about the same amount each {Text fill: If H95=2: "month"; If H95=3: "quarter"; If H95=4: "six months"; If H95=97: PERIOD FROM H95A}?

1. YES [H100]

2. NO [H98]

-2. DK [H98]

-1. RF [H98]

H98. **Before taxes and other deductions**, about how much did you receive from stocks or stock mutual funds in the **last twelve months?**

(IWER: WE WANT THE AMOUNT BEFORE ANY DEDUCTIONS.)

[IWER: DO NOT PROBE DK]

_____ {15-digits} [H98A]

-2. DK [H99A]

-1. RF [H99A]

H98A. Currency _____

{Pick list, US\$ first; allow only one choice}{H100; If OTHER, H98B}

H98B. Currency (other specify) _____ {30 characters}[H100]

H99A. Did it amount to less than \$5,000, more than \$5,000, or what?

1. LESS THAN \$5,000 [H99C]

2. ABOUT \$5,000 [H100]

3. MORE THAN \$5,000 [H99B]

-2. DK [H100]

-1. RF [H100]

H99B. Did it amount to less than \$25,000, more than \$25,000, or what?

1. LESS THAN \$25,000 [H100]

2. ABOUT \$25,000 [H100]

2. MORE THAN \$25,000 [H100]

-2. DK [H100]

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-1. RF [H100]

H99C. Did it amount to less than \$1,000, more than \$1,000, or what?

- 1. LESS THAN \$1,000 [H100]
- 2. ABOUT \$1,000 [H100]
- 3. MORE THAN \$1,000 [H100]
- 2. DK [H100]
- 1. RF [H100]

Time Stamp

H100. Aside from anything you have already told me about, Do you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} have any **corporate** bonds?

- 1. YES [H101]
- 2. NO [H101]
- 2. DK [H101]
- 1. RF [H101]

H101. Aside from anything you have already told me about, do you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} have any **government** bonds? Do **not** include United States Government savings bonds or treasury bills.

- 1. YES [H102]
- 2. NO [H104]
- 2. DK [H104]
- 1. RF [H104]

{If H100 not 1 and H101 not 1, go to H112}

H102. Are any of these issued by the United States Government?

- 1. YES [H103]
- 2. NO [H103]
- 2. DK [H103]
- 1. RF [H103]

H103. Are any of these issued by non-United States governments?

- 1. YES [H104]
- 2. NO [H104]
- 2. DK [H104]
- 1. RF [H104]

{Do questions H104 through H111C_X separately for corporate bonds (H100=1), U.S government bonds (H102=1), and foreign bonds (H103=1)}

H104_X. **{MAX LOOP ITERATIONS = 3}** Now I would like you to think about the {Text fill: corporate/ United States Government/foreign} bonds you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} have.

If you sold all those bonds and paid off anything you owed on them, about how much would you have?

[IWER: DO NOT PROBE DK/RF]

[INTERVIEWER: IF ACTUAL RESPONSE IS "-1" OR "-2" PLEASE OPEN COMMENT BOX AND NOTE THIS]

{Can be < 0}

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\$_____ {15-digits}[H104A_X]

-2. DK [ASSIGN RANDOM #1-3: H105A_X/RANDOM ASSIGNMENT]

-1. RF [ASSIGN RANDOM #1-3: H105A_X/RANDOM ASSIGNMENT]

H104A_X. Currency_____

{Pick list, US\$ first; allow only one choice}{H106_X; If OTHER, H104B_X}

H104B_X. Currency (other specify)_____ {30 characters}[H106_X]

RANDOM ASSIGNMENT 1:

H105A_X. Would it amount to less than \$2,500, more than \$2,500, or what?

- 1. LESS THAN \$2,500 [H106_X]
- 3. ABOUT \$2,500 [H106_X]
- 5. MORE THAN \$2,500 [H105B_X]
- 2. DK [H106_X]
- 1. RF [H106_X]

H105B_X. Would it amount to less than \$25,000, more than \$25,000, or what?

- 1. LESS THAN \$25,000 [H106_X]
- 3. ABOUT \$25,000 [H106_X]
- 5. MORE THAN \$25,000 [H105C_X]
- 2. DK [H106_X]
- 1. RF [H106_X]

H105C_X. Would it amount to less than \$125,000, more than \$125,000, or what?

- 1. LESS THAN \$125,000 [H106_X]
- 3. ABOUT \$125,000 [H106_X]
- 5. MORE THAN \$125,000 [H105D_X]
- 2. DK [H106_X]
- 1. RF [H106_X]

H105D_X. Would it amount to less than \$250,000, more than \$250,000, or what?

- 1. LESS THAN \$250,000 [H106_X]
- 3. ABOUT \$250,000 [H106_X]
- 5. MORE THAN \$250,000 [H106_X]
- 2. DK [H106_X]
- 1. RF [H106_X]

RANDOM ASSIGNMENT 2:

H105B_X. Would it amount to less than \$25,000, more than \$25,000, or what?

- 1. LESS THAN \$25,000 [H105A_X]
- 3. ABOUT \$25,000 [H106_X]
- 5. MORE THAN \$25,000 [H105C_X]
- 2. DK [H106_X]
- 1. RF [H106_X]

H105C_X. Would it amount to less than \$125,000, more than \$125,000, or what?

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- 1. LESS THAN \$125,000 [H106_X]
- 3. ABOUT \$125,000 [H106_X]
- 5. MORE THAN \$125,000 [H105D_X]
- 2. DK [H106_X]
- 1. RF [H106_X]

H105D_X. Would it amount to less than \$250,000, more than \$250,000, or what?

- 1. LESS THAN \$250,000 [H106_X]
- 3. ABOUT \$250,000 [H106_X]
- 5. MORE THAN \$250,000 [H106_X]
- 2. DK [H106_X]
- 1. RF [H106_X]

H105A_X. Would it amount to less than \$2,500, more than \$2,500, or what?

- 1. LESS THAN \$2,500 [H106_X]
- 3. ABOUT \$2,500 [H106_X]
- 5. MORE THAN \$2,500 [H106_X]
- 2. DK [H106_X]
- 1. RF [H106_X]

RANDOM ASSIGNMENT 3:

H105C_X. Would it amount to less than \$125,000, more than \$125,000, or what?

- 1. LESS THAN \$125,000 [H105B_X]
- 3. ABOUT \$125,000 [H106_X]
- 5. MORE THAN \$125,000 [H105D_X]
- 2. DK [H106_X]
- 1. RF [H106_X]

H105D_X. Would it amount to less than \$250,000, more than \$250,000, or what?

- 1. LESS THAN \$250,000 [H106_X]
- 3. ABOUT \$250,000 [H106_X]
- 5. MORE THAN \$250,000 [H106_X]
- 2. DK [H106_X]
- 1. RF [H106_X]

H105B_X. Would it amount to less than \$25,000, more than \$25,000, or what?

- 1. LESS THAN \$25,000 [H105A_X]
- 3. ABOUT \$25,000 [H106_X]
- 5. MORE THAN \$25,000 [H106_X]
- 2. DK [H106_X]
- 1. RF [H106_X]

H105A_X. Would it amount to less than \$2,500, more than \$2,500, or what?

- 1. LESS THAN \$2,500 [H106_X]
- 3. ABOUT \$2,500 [H106_X]
- 5. MORE THAN \$2,500 [H106_X]
- 2. DK [H106_X]
- 1. RF [H106_X]

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H106_X. Do these bonds or bond funds pay any dividends or interest?

- 1. YES [H107]
- 2. NO [NEXT ASSET OR H112]
- 2. DK [NEXT ASSET OR H112]
- 1. RF [NEXT ASSET OR H112]

H107_X. How often is it paid?

- 1. ACCUMULATES/REINVEST [H110]
- 2. MONTHLY [H108]
- 3. QUARTERLY [H108]
- 4. SIX MONTHS [H108]
- 5. YEARLY [H110]
- 97. OTHER [H107A]
- 2. DK [H110]
- 1. RF [H110]

H107A_X. (specify)_____ {80 characters}[H108]

- 2. DK [H110]
- 1. RF [H110]

H108_X. Before any expenses or deductions, about how much did you receive {Text fill: If H107_X=4: "in the"} last {Text fill: If H107_X=2: "month"; If H107_X=3: "quarter"; If H107_X=4: "six months"; If H107_X=97: PERIOD FROM H107A_X;} from that?

[IWER: WE WANT THE AMOUNT BEFORE ANY DEDUCTIONS.]

[IWER: DO NOT PROBE DK]

_____ {15-digits}[H108A_X]

- 2. DK [H110]
- 1. RF [H110]

H108A_X. Currency_____

{Pick list, US\$ first; allow only one choice}[H109; If OTHER, H108B]

H108B_X. Currency (other specify)_____ {30 characters}[H109]

H109_X. Did you get about the same amount each {Text fill: If H107_X=2: "month"; If H107_X=3: "quarter"; If H107_X=4: "six months"; If H107_X=97: PERIOD FROM H107A_X;}?

- 1. YES [H112]
- 2. NO [H110]
- 2. DK [H110]
- 1. RF [H110]

H110_X. Before taxes and other deductions, about how much did you receive from these bonds or bond funds in the last twelve months?

[IWER: WE WANT THE AMOUNT BEFORE ANY DEDUCTIONS.]

[IWER: DO NOT PROBE DK]

\$_____ {15-digits}[H110A_X]

- 2. DK [H111A_X_X]
- 1. RF [H111A_X_X]

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H110A_X. Currency_____ {Pick list, US\$ first; allow only one choice}{H112; If OTHER, H110B}

H110B_X. Currency (other specify)_____ {30 characters}{H112}

H111A_X. Did it amount to less than \$5,000, more than \$5,000, or what?

- 1. LESS THAN \$5,000 [H111C_X]
- 2. ABOUT \$5,000 [H112]
- 3. MORE THAN \$5,000 [H111B_X]
- 2. DK [H112]
- 1. RF [H112]

H111B_X. Did it amount to less than \$20,000, more than \$20,000, or what?

- 1. LESS THAN \$20,000 [H112]
- 2. ABOUT \$20,000 [H112]
- 2. MORE THAN \$20,000 [H112]
- 2. DK [H112]
- 1. RF [H112]

H111C_X. Did it amount to less than \$1,000, more than \$1,000, or what?

- 1. LESS THAN \$1,000 [H112]
- 2. ABOUT \$1,000 [H112]
- 3. MORE THAN \$1,000 [H112]
- 2. DK [H112]
- 1. RF [H112]

Time Stamp

H112. Aside from anything you have already told me about, do you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} have any checking or savings accounts or money market funds?

- 1. YES [H113]
- 2. NO [H124]
- 2. DK [H124]
- 1. RF [H124]

H113. Are these checking or savings accounts held in a bank or institution in the United States, a foreign country, or both?

- 1. UNITED STATES ONLY [H114]
- 2. UNITED STATES AND FOREIGN COUNTRY [H114]
- 3. FOREIGN COUNTRY ONLY [H115]
- 2. DK [H116]
- 1. RF [H116]

H114. In what main state are these checking or savings accounts held?

STATE CODE: (__) [MAX =2] [IF H113=1, H116; IF H113=2, H115]

- 2. DK {IF H113=1, [H116]; IF H113=2, [H115]}
- 1. RF {IF H113=1, [H116]; IF H113=2, [H115]}

H115. In what main country are these checking or savings accounts held?

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COUNTRY_____ {Pick list}[H116; IF H115="OTHER": H115A]

-2. DK [H116]

-1. RF [H116]

H115A. COUNTRY (other specify)_____ {30 characters}[H116]

-2. DK [H116]

-1. RF [H116]

H116_X. {Do questions H116 to H123 for United States holdings if answer to H113=1; Do questions H116 to H123 for all foreign countries if answer to H113=3; Do questions H116 to H123 for United States holdings and all foreign country holdings separately if answer to H113=2; Do questions H116 to H123 for all holdings if answer to H113=-2 or -1}

{MAX LOOP ITERATIONS = 2}

If you added up all such accounts {Text fill: If H113 = 1 or 2: "held in the United States,"} {Text fill: If H113 = 2 or 3: "held in all foreign countries,"} {Text fill: If H113 = -2 or -1: ", " } about how much would they amount to right now?
[IWER: DO NOT PROBE DK]

H116A_X. \$_____ {15-digits}[H116B_X]

-2. DK [ASSIGN RANDOM #1-3: H117A_X/RANDOM ASSIGNMENT]

-1. RF [ASSIGN RANDOM #1-3: H117A_X/RANDOM ASSIGNMENT]

H116B_X. {IF H113=2: US THEN FOREIGN HOLDINGS; IF H113=1 AND X=1 or if H113=2 AND X=1, AUTOMATICALLY CODE US DOLLARS AND SKIP TO H118}

Currency_____

{Pick list, US\$ first; allow only one choice}{H118; If OTHER, H116C}

H116C_X. Currency (other specify)_____ {30 characters}[H118]

RANDOM ASSIGNMENT 1:

H117A_X. Does it amount to less than \$5,000, more than \$5,000, or what?

1. LESS THAN \$5,000 [H118]

3. ABOUT \$5,000 [H118]

5. MORE THAN \$5,000 [H117B_X]

-2. DK [H118]

-1. RF [H118]

H117B_X. Does it amount to less than \$50,000, more than \$50,000, or what?

1. LESS THAN \$50,000 [H118]

3. ABOUT \$50,000 [H118]

5. MORE THAN \$50,000 [H117C_X]

-2. DK [H118]

-1. RF [H118]

H117C_X. Does it amount to less than \$150,000, more than \$150,000, or what?

1. LESS THAN \$150,000 [H118]

3. ABOUT \$150,000 [H118]

5. MORE THAN \$150,000 [H117D_X]

-2. DK [H118]

-1. RF [H118]

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H117D_X. Does it amount to less than \$300,000, more than \$300,000, or what?

- 1. LESS THAN \$300,000 [H118]
- 3. ABOUT \$300,000 [H118]
- 5. MORE THAN \$300,000 [H118]
- 2. DK [H118]
- 1. RF [H118]

RANDOM ASSIGNMENT 2:

H117B_X. Does it amount to less than \$50,000, more than \$50,000, or what?

- 1. LESS THAN \$50,000 [H117A_X]
- 3. ABOUT \$50,000 [H118]
- 5. MORE THAN \$50,000 [H117C_X]
- 2. DK [H118]
- 1. RF [H118]

H117C_X. Does it amount to less than \$150,000, more than \$150,000, or what?

- 1. LESS THAN \$150,000 [H118]
- 3. ABOUT \$150,000 [H118]
- 5. MORE THAN \$150,000 [H17D]
- 2. DK [H118]
- 1. RF [H118]

H117D_X. Does it amount to less than \$300,000, more than \$300,000, or what?

- 1. LESS THAN \$300,000 [H118]
- 3. ABOUT \$300,000 [H118]
- 5. MORE THAN \$300,000 [H118]
- 2. DK [H118]
- 1. RF [H118]

H117A_X. Does it amount to less than \$5,000, more than \$5,000, or what?

- 1. LESS THAN \$5,000 [H118]
- 3. ABOUT \$5,000 [H118]
- 5. MORE THAN \$5,000 [H118]
- 2. DK [H118]
- 1. RF [H118]

RANDOM ASSIGNMENT 3:

H117C_X. Does it amount to less than \$150,000, more than \$150,000, or what?

- 1. LESS THAN \$150,000 [H117B_X]
- 3. ABOUT \$150,000 [H118]
- 5. MORE THAN \$150,000 [H117D_X]
- 2. DK [H118]
- 1. RF [H118]

H117D_X. Does it amount to less than \$300,000, more than \$300,000, or what?

- 1. LESS THAN \$300,000 [H118]

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- 3. ABOUT \$300,000 [H118]
- 5. MORE THAN \$300,000 [H118]
- 2. DK [H118]
- 1. RF [H118]

H117B_X. Does it amount to less than \$50,000, more than \$50,000, or what?

- 1. LESS THAN \$50,000 [H117A_X]
- 3. ABOUT \$50,000 [H118]
- 5. MORE THAN \$50,000 [H118]
- 2. DK [H118]
- 1. RF [H118]

H117A_X. Does it amount to less than \$5,000, more than \$5,000, or what?

- 1. LESS THAN \$5,000 [H118]
- 3. ABOUT \$5,000 [H118]
- 5. MORE THAN \$5,000 [H118]
- 2. DK [H118]
- 1. RF [H118]

H118_X. Do these accounts or money market funds {Text fill: If H113 = 1 or 2: "held in the United States"} {Text fill: If H113 = 2 or 3: "held in all foreign countries"} {Text fill: If H113 = -2 or -1: ""} pay any dividends or interest?

- 1. YES [H119]
- 2. NO [NEXT ASSET OR H124]
- 2. DK [NEXT ASSET OR H124]
- 1. RF [NEXT ASSET OR H124]

H119_X. How often is it paid?

- 1. ACCUMULATES/REINVEST [H124]
- 2. MONTHLY [H120]
- 3. QUARTERLY [H120]
- 4. SIX MONTHS [H120]
- 5. YEARLY [H124]
- 97. Other [H119A]
- 2. DK [H122]
- 1. RF [H122]

H119A_X. (specify)_____ {80 characters}[H120]

- 2. DK [H122]
- 1. RF [H122]

H120_X. Before taxes and other deductions, about how much did you receive {Text fill: If H119_X=4: "in the"} last {Text fill: If H119_X=2: "month"; If H119_X=3: "quarter"; If H119_X=4: "six months"; If H119_X=97: PERIOD FROM H119A_X} from these accounts {Text fill: If H113 = 1 or 2: "held in the United States"} {Text fill: If H113 = 2 or 3: "held in all foreign countries"} {Text fill: If H113 = -2 or -1: ""}?

[IWER: WE WANT THE AMOUNT BEFORE ANY DEDUCTIONS.]

[IWER: DO NOT PROBE DK]

_____ {15-digits}[H120A_X]

- 2. DK [H124]

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-1. RF [H124]

H120A_X. Currency_____ {Pick list, US\$ first; allow only one choice}{H121; If OTHER, H120B}

H120B_X. Currency (other specify)_____ {30 characters}{H121}

H121_X. Did you get about the same amount each {Text fill: If H119_X=2: "month"; If H119_X=3: "quarter"; If H119_X=4: "six months"; If H119_X=97: PERIOD FROM H119A_X}?

- 1. YES [H124]
- 2. NO [H122]
- 2. DK [H122]
- 1. RF [H122]

H122_X. Before taxes and other deductions, about how much did you receive from these accounts {Text fill: If H113 = 1 or 2: "held in the United States"} {Text fill: If H113 = 2 or 3: "held in all foreign countries"} {Text fill: If H113 = -2 or -1: ""} in the last twelve months?

[IWER: WE WANT THE AMOUNT BEFORE ANY DEDUCTIONS.]

[IWER: DO NOT PROBE DK]

\$_____ {15-digits}{H122A_X}

- 2. DK [H123A]
- 1. RF [H123A]

H122A_X. Currency_____ {Pick list, US\$ first; allow only one choice}{NEXT ASSET OR H124; If OTHER, H122B}

H122B_X. Currency (other specify)_____ {30 characters}{NEXT ASSET OR H124}

H123A_X. Did it amount to less than \$2,000, more than \$2,000, or what?

- 1. LESS THAN \$2,000 [H123C]
- 2. ABOUT \$2,000 [NEXT ASSET OR H124]
- 3. MORE THAN \$2,000 [H123B]
- 2. DK [NEXT ASSET OR H124]
- 1. RF [NEXT ASSET OR H124]

H123B_X. Did it amount to less than \$5,000, more than \$5,000, or what?

- 1. LESS THAN \$5,000 [NEXT ASSET OR H124]
- 2. ABOUT \$5,000 [NEXT ASSET OR H124]
- 3. MORE THAN \$5,000 [NEXT ASSET OR H124]
- 2. DK [NEXT ASSET OR H124]
- 1. RF [NEXT ASSET OR H124]

H123C_X. Did it amount to less than \$1,000, more than \$1,000, or what?

- 1. LESS THAN \$1,000 [NEXT ASSET OR H124]
- 2. ABOUT \$1,000 [NEXT ASSET OR H124]
- 3. MORE THAN \$1,000 [NEXT ASSET OR H124]
- 2. DK [NEXT ASSET OR H124]
- 1. RF [NEXT ASSET OR H124]

Time Stamp

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H124. Aside from anything you have already told me about, do you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} have any money in CDs, Government Savings Bonds, or U.S. Treasury Bills?

- 1. YES [H126]
- 2. NO [H134]
- 2. DK [H134]
- 1. RF [H134]

H126. If you added up all such assets, about how much would they amount to right now?
[IWER: DO NOT PROBE DK]

\$ _____ {15-digits}[H126A]

- 2. DK [ASSIGN RANDOM #1-3: H127A/RANDOM ASSIGNMENT]
- 1. RF [ASSIGN RANDOM #1-3: H127A/RANDOM ASSIGNMENT]

H126A. Currency _____
{Pick list, US\$ first; allow only one choice}{H128; If OTHER, H126B}

H126B. Currency (other specify) _____ {30 characters}[H128]

RANDOM ASSIGNMENT 1:

H127A. Would it amount to less than \$2,500, more than \$2,500, or what?

- 1. LESS THAN \$2,500 [H128]
- 3. ABOUT \$2,500 [H128]
- 5. MORE THAN \$2,500 [H127B]
- 2. DK [H128]
- 1. RF [H128]

H127B. Would it amount to less than \$25,000, more than \$25,000, or what?

- 1. LESS THAN \$25,000 [H128]
- 3. ABOUT \$25,000 [H128]
- 5. MORE THAN \$25,000 [H127C]
- 2. DK [H128]
- 1. RF [H128]

H127C. Would it amount to less than \$125,000, more than \$125,000, or what?

- 1. LESS THAN \$125,000 [H128]
- 3. ABOUT \$125,000 [H128]
- 5. MORE THAN \$125,000 [H127D]
- 2. DK [H128]
- 1. RF [H128]

H127D. Would it amount to less than \$250,000, more than \$250,000, or what?

- 1. LESS THAN \$250,000 [H128]
- 3. ABOUT \$250,000 [H128]
- 5. MORE THAN \$250,000 [H128]
- 2. DK [H128]
- 1. RF [H128]

RANDOM ASSIGNMENT 2:

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H127B. Would it amount to less than \$25,000, more than \$25,000, or what?

- 1. LESS THAN \$25,000 [H127A]
- 3. ABOUT \$25,000 [H128]
- 5. MORE THAN \$25,000 [H127C]
- 2. DK [H128]
- 1. RF [H128]

H127C. Would it amount to less than \$125,000, more than \$125,000, or what?

- 1. LESS THAN \$125,000 [H128]
- 3. ABOUT \$125,000 [H128]
- 5. MORE THAN \$125,000 [H127D]
- 2. DK [H128]
- 1. RF [H128]

H127D. Would it amount to less than \$250,000, more than \$250,000, or what?

- 1. LESS THAN \$250,000 [H128]
- 3. ABOUT \$250,000 [H128]
- 5. MORE THAN \$250,000 [H128]
- 2. DK [H128]
- 1. RF [H128]

H127A. Would it amount to less than \$2,500, more than \$2,500, or what?

- 1. LESS THAN \$2,500 [H128]
- 3. ABOUT \$2,500 [H128]
- 5. MORE THAN \$2,500 [H128]
- 2. DK [H128]
- 1. RF [H128]

RANDOM ASSIGNMENT 3:

H127C. Would it amount to less than \$125,000, more than \$125,000, or what?

- 1. LESS THAN \$125,000 [H81B]
- 3. ABOUT \$125,000 [H128]
- 5. MORE THAN \$125,000 [H81D]
- 2. DK [H128]
- 1. RF [H128]

H127D. Would it amount to less than \$250,000, more than \$250,000, or what?

- 1. LESS THAN \$250,000 [H128]
- 3. ABOUT \$250,000 [H128]
- 5. MORE THAN \$250,000 [H128]
- 2. DK [H128]
- 1. RF [H128]

H127B. Would it amount to less than \$25,000, more than \$25,000, or what?

- 1. LESS THAN \$25,000 [H127A]
- 3. ABOUT \$25,000 [H128]
- 5. MORE THAN \$25,000 [H128]
- 2. DK [H128]

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-1. RF [H128]

H127A. Would it amount to less than \$2,500, more than \$2,500, or what?

- 1. LESS THAN \$2,500 [H128]
- 3. ABOUT \$2,500 [H128]
- 5. MORE THAN \$2,500 [H128]
- 2. DK [H128]
- 1. RF [H128]

H128. Do these CDs, government bonds, or treasury bills pay any dividends or interest?

- 1. YES [H129]
- 2. NO [H134]
- 2. DK [H134]
- 1. RF [H134]

H129. How often is it paid?

- 1. ACCUMULATES/REINVEST [H132]
- 2. MONTHLY [H130]
- 3. QUARTERLY [H130]
- 4. SIX MONTHS [H130]
- 5. YEARLY [H132]
- 97. OTHER [H129A]
- 2. DK [H132]
- 1. RF [H132]

H129A. (specify) _____ {80 characters}[H130]

- 2. DK [H132]
- 1. RF [H132]

H130 Before taxes and other deductions, about how much did you receive {Text fill: If H129=4: "in the"} last {Text fill: If H129=2: "month"; If H129=3: "quarter"; If H129=4: "six months"; If H129=97: PERIOD FROM H129A} from those accounts?

[IWER: WE WANT THE AMOUNT BEFORE ANY DEDUCTIONS.]

[IWER: DO NOT PROBE DK]

_____ {15-digits}[H131]

- 2. DK [H132]
- 1. RF [H132]

H131. Did you get about the same amount each {Text fill: If H129=2: "month"; If H129=3: "quarter"; If H129=4: "six months"; If H129=97: PERIOD FROM H129A}?

- 1. YES [H134]
- 2. NO [H132]
- 2. DK [H132]
- 1. RF [H132]

H132. Before taxes and other deductions, about how much did you receive from CD's, government bonds, or U.S. treasury bills in the last twelve months?

[IWER: IF NOT AMOUNT, ENTER \$US]

[IWER: WE WANT THE AMOUNT BEFORE ANY DEDUCTIONS.]

[IWER: DO NOT PROBE DK]

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\$ _____{15-digits}[H132A]

-2. DK [H133A]

-1. RF [H133A]

H132A. Currency _____

{Pick list, US\$ first; allow only one choice}{H134; if OTHER, H132B}

H132B. Currency (other specify) _____{30 characters}[H134]

H133A. Did it amount to less than \$2,000, more than \$2,000, or what?

1. LESS THAN \$2,000 [H133C]

2. ABOUT \$2,000 [H134]

3. MORE THAN \$2,000 [H133B]

-2. DK [H134]

-1. RF [H134]

H133B. Did it amount to less than \$5,000, more than \$5,000, or what?

1. LESS THAN \$5,000 [H134]

2. ABOUT \$5,000 [H134]

3. MORE THAN \$5,000 [H134]

-2. DK [H134]

-1. RF [H134]

H133C. Did it amount to less than \$1,000, more than \$1,000, or what?

1. LESS THAN \$1,000 [H134]

2. ABOUT \$1,000 [H134]

3. MORE THAN \$1,000 [H134]

-2. DK [H134]

-1. RF [H134]

Time Stamp

H134. Do you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} own anything for transportation, like cars, trucks, a trailer, a motor home, a boat, or an airplane?

1. YES [H135]

2. NO [H140]

-2. DK [H140]

-1. RF [H140]

H135. Is this transportation equipment held in the United States, a foreign country, or both?

1. UNITED STATES ONLY [H136]

2. UNITED STATES AND FOREIGN COUNTRY [H136]

3. FOREIGN COUNTRY ONLY [H137]

-2. DK [H138]

-1. RF [H138]

H136. In what main state is this transportation equipment kept?

STATE CODE: (__) [MAX =2] {IF H135=1, [H138]; IF H135=2, [H137]}

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- 2. DK {IF H135=1, [H138]; IF H135=2, [H137]}
- 1. RF {IF H135=1, [H138]; IF H135=2, [H137]}

H137. In what main country is this transportation equipment kept?

COUNTRY_____ {Pick list}[H138; IF H137="OTHER": H137A]

- 2. DK [H138]
- 1. RF [H138]

H137A. COUNTRY (other specify)_____ {30 characters}[H138]

- 2. DK [H138]
- 1. RF [H138]

H138_X. {Do questions H138 to H139C for United States holdings if answer to H135=1; Do questions H138 to H139C for all foreign countries if answer to H135=3; Do questions H138 to H139C for United States holdings and all foreign country holdings separately if answer to H135=2; Do questions H138 to H139C for all holdings if answer to H135=-2 or -1} {MAX LOOP ITERATIONS = 2}

What are those {Text fill: If H135 = 1 or 2: "held in the United States"} {Text fill: If H135 = 2 or 3: "held in all foreign countries"} {Text fill: If H135 = -2 or -1: ""} all worth altogether, minus anything you still owe on them?

[IWER: DO NOT PROBE DK/RF]

[INTERVIEWER: IF ACTUAL RESPONSE IS "-1" OR "-2" PLEASE OPEN COMMENT BOX AND NOTE THIS]

{Can be < 0}

H138A_X. \$_____ {15-digits}[H138B_X]

- 2. DK [ASSIGN RANDOM #1-3: H139A/RANDOM ASSIGNMENT]
- 1. RF [ASSIGN RANDOM #1-3: H139A/RANDOM ASSIGNMENT]

H138B_X. { IF H135=2: US THEN FOREIGN HOLDINGS; IF H135=1 AND X=1, AUTOMATICALLY CODE US DOLLARS AND SKIP TO H140}

Currency_____

{Pick list, US\$ first; allow only one choice}{NEXT ASSET OR H140; If OTHER, H138C}

H138C_X. Currency (other specify)_____ {30 characters}[NEXT ASSET OR H140]

RANDOM ASSIGNMENT 1:

H139A_X. Does it amount to less than \$5,000, more than \$5,000, or what?

- 1. LESS THAN \$5,000 [NEXT ASSET OR H140]
- 3. ABOUT \$5,000 [NEXT ASSET OR H140]
- 5. MORE THAN \$5,000 [H139B]
- 2. DK [NEXT ASSET OR H140]
- 1. RF [NEXT ASSET OR H140]

H139B_X. Does it amount to less than \$25,000, more than \$25,000, or what?

- 1. LESS THAN \$25,000 [NEXT ASSET OR H140]
- 3. ABOUT \$25,000 [NEXT ASSET OR H140]
- 5. MORE THAN \$25,000 [H139C]
- 2. DK [NEXT ASSET OR H140]
- 1. RF [NEXT ASSET OR H140]

H139C_X. Does it amount to less than \$200,000, more than \$200,000, or what?

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- 1. LESS THAN \$200,000 [NEXT ASSET OR H140]
- 3. ABOUT \$200,000 [NEXT ASSET OR H140]
- 5. MORE THAN \$200,000 [NEXT ASSET OR H140]
- 2. DK [NEXT ASSET OR H140]
- 1. RF [NEXT ASSET OR H140]

RANDOM ASSIGNMENT 2:

H139B_X. Does it amount to less than \$25,000, more than \$25,000, or what?

- 1. LESS THAN \$25,000 [H139A]
- 3. ABOUT \$25,000 [NEXT ASSET OR H140]
- 5. MORE THAN \$25,000 [H139C]
- 2. DK [NEXT ASSET OR H140]
- 1. RF [NEXT ASSET OR H140]

H139C_X. Does it amount to less than \$200,000, more than \$200,000, or what?

- 1. LESS THAN \$200,000 [NEXT ASSET OR H140]
- 3. ABOUT \$200,000 [NEXT ASSET OR H140]
- 5. MORE THAN \$200,000 [NEXT ASSET OR H140]
- 2. DK [NEXT ASSET OR H140]
- 1. RF [NEXT ASSET OR H140]

H139A_X. Does it amount to less than \$5,000, more than \$5,000, or what?

- 1. LESS THAN \$5,000 [NEXT ASSET OR H140]
- 3. ABOUT \$5,000 [NEXT ASSET OR H140]
- 5. MORE THAN \$5,000 [NEXT ASSET OR H140]
- 2. DK [NEXT ASSET OR H140]
- 1. RF [NEXT ASSET OR H140]

RANDOM ASSIGNMENT 3:

H139C_X. Does it amount to less than \$200,000, more than \$200,000, or what?

- 1. LESS THAN \$200,000 [H139B]
- 3. ABOUT \$200,000 [NEXT ASSET OR H140]
- 5. MORE THAN \$200,000 [NEXT ASSET OR H140]
- 2. DK [NEXT ASSET OR H140]
- 1. RF [NEXT ASSET OR H140]

H139B_X. Does it amount to less than \$25,000, more than \$25,000, or what?

- 1. LESS THAN \$25,000 [H139A]
- 3. ABOUT \$25,000 [NEXT ASSET OR H140]
- 5. MORE THAN \$25,000 [NEXT ASSET OR H140]
- 2. DK [NEXT ASSET OR H140]
- 1. RF [NEXT ASSET OR H140]

H139A_X. Does it amount to less than \$5,000, more than \$5,000, or what?

- 1. LESS THAN \$5,000 [NEXT ASSET OR H140]
- 3. ABOUT \$5,000 [NEXT ASSET OR H140]
- 5. MORE THAN \$5,000 [NEXT ASSET OR H140]
- 2. DK [NEXT ASSET OR H140]

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-1. RF [NEXT ASSET OR H140]

Time Stamp

H140. Do you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} have any other savings or assets, such as jewelry, money owed to you by others, a collection for investment purposes, or rights in a trust or estate where you are the beneficiary that you haven't already told us about?

[IWER: EXCLUDE THE CASH VALUE OF ANY LIFE INSURANCE POLICIES]

1. YES [H141]

2. NO [H146]

-2. DK [H146]

-1. RF [H146]

H141. If you sold all that and then paid off any debts on it, about how much would you have?

[IWER: DO NOT PROBE DK/RF]

[INTERVIEWER: IF ACTUAL RESPONSE IS "-1" OR "-2" PLEASE OPEN COMMENT BOX AND NOTE THIS]

\$_____ {15-digits} {Can be < 0} [H141A]

-2. DK [ASSIGN RANDOM #1-3: H142A/RANDOM ASSIGNMENT]

-1. RF [ASSIGN RANDOM #1-3: H142A/RANDOM ASSIGNMENT]

H141A. Currency_____

{Pick list, US\$ first; allow only one choice} {H143; If OTHER, H141B}

H141B. Currency (other specify)_____ {30 characters} [H143]

RANDOM ASSIGNMENT 1:

H142A. Would it amount to less than \$5,000, more than \$5,000, or what?

1. LESS THAN \$5,000 [H143]

3. ABOUT \$5,000 [H143]

5. MORE THAN \$5,000 [H142B]

-2. DK [H143]

-1. RF [H143]

H142B. Would it amount to less than \$50,000, more than \$50,000, or what?

1. LESS THAN \$50,000 [H143]

3. ABOUT \$50,000 [H143]

5. MORE THAN \$50,000 [H142C]

-2. DK [H143]

-1. RF [H143]

H142C. Would it amount to less than \$100,000, more than \$100,000, or what?

1. LESS THAN \$100,000 [H143]

3. ABOUT \$100,000 [H143]

5. MORE THAN \$100,000 [H143]

-2. DK [H143]

-1. RF [H143]

RANDOM ASSIGNMENT 2:

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H142B. Would it amount to less than \$50,000, more than \$50,000, or what?

- 1. LESS THAN \$50,000 [H142A]
- 3. ABOUT \$50,000 [H143]
- 5. MORE THAN \$50,000 [H142C]
- 2. DK [H143]
- 1. RF [H143]

H142C. Would it amount to less than \$100,000, more than \$100,000, or what?

- 1. LESS THAN \$100,000 [H143]
- 3. ABOUT \$100,000 [H143]
- 5. MORE THAN \$100,000 [H143]
- 2. DK [H143]
- 1. RF [H143]

H142A. Would it amount to less than \$5,000, more than \$5,000, or what?

- 1. LESS THAN \$5,000 [H143]
- 3. ABOUT \$5,000 [H143]
- 5. MORE THAN \$5,000 [H143]
- 2. DK [H143]
- 1. RF [H143]

RANDOM ASSIGNMENT 3:

H142C. Would it amount to less than \$100,000, more than \$100,000, or what?

- 1. LESS THAN \$100,000 [H142B]
- 3. ABOUT \$100,000 [H143]
- 5. MORE THAN \$100,000 [H143]
- 2. DK [H143]
- 1. RF [H143]

H142B. Would it amount to less than \$50,000, more than \$50,000, or what?

- 1. LESS THAN \$50,000 [H142A]
- 3. ABOUT \$50,000 [H143]
- 5. MORE THAN \$50,000 [H143]
- 2. DK [H143]
- 1. RF [H143]

H142A. Would it amount to less than \$5,000, more than \$5,000, or what?

- 1. LESS THAN \$5,000 [H143]
- 3. ABOUT \$5,000 [H143]
- 5. MORE THAN \$5,000 [H143]
- 2. DK [H143]
- 1. RF [H143]

H143. Do any of these other savings or assets pay any income?

- 1. YES [H144]
- 2. NO [H146]
- 2. DK [H146]
- 1. RF [H146]

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H144. Before taxes and other deductions, about how much income did you receive from these other assets in the last twelve months?

[IWER: WE WANT THE AMOUNT BEFORE ANY DEDUCTIONS.]

[IWER: DO NOT PROBE DK]

\$ _____{15-digits}[H144A]

-2. DK [H145A]

-1. RF [H145A]

H144A. Currency _____

{Pick list, US\$ first; allow only one choice}[H146; If OTHER, H144B]

H144B. Currency (other specify) _____{30 characters}[H146]

H145A. Did it amount to less than \$5,000, more than \$5,000, or what?

1. LESS THAN \$5,000 [H145C]

2. ABOUT \$5,000 [H146]

3. MORE THAN \$5,000 [H145B]

-2. DK [H146]

-1. RF [H146]

H145B. Did it amount to less than \$25,000, more than \$25,000, or what?

1. LESS THAN \$25,000 [H146]

2. ABOUT \$25,000 [H146]

3. MORE THAN \$25,000 [H146]

-2. DK [H146]

-1. RF [H146]

H145C. Did it amount to less than \$1,000, more than \$1,000, or what?

1. LESS THAN \$1,000 [H146]

2. ABOUT \$1,000 [H146]

3. MORE THAN \$1,000 [H146]

-2. DK [H146]

-1. RF [H146]

Time Stamp

H146. Do you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} currently have any money or assets that are held in an Individual Retirement Account, that is, in an IRA or KEOGH account in the United States?

1. YES [H147]

2. NO [H153]

-2. DK [H153]

-1. RF [H153]

H147. About how much are in your IRA or KEOGH accounts at the present time?

[IWER: DO NOT PROBE DK/RF]

[IWER: AMOUNT IN U.S. DOLLARS]

\$ _____{15-digits}[H149]

-2. DK [ASSIGN RANDOM #1-3: H148A/RANDOM ASSIGNMENT]

-1. RF [ASSIGN RANDOM #1-3: H148A/RANDOM ASSIGNMENT]

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RANDOM ASSIGNMENT 1:

H148A. Does it amount to less than \$10,000, more than \$10,000, or what?

- 1. LESS THAN \$10,000 [H149]
- 3. ABOUT \$10,000 [H149]
- 5. MORE THAN \$10,000 [H148B]
- 2. DK [H149]
- 1. RF [H149]

H148B. Does it amount to less than \$25,000, more than \$25,000, or what?

- 1. LESS THAN \$25,000 [H149]
- 3. ABOUT \$25,000 [H149]
- 5. MORE THAN \$25,000 [H148C]
- 2. DK [H149]
- 1. RF [H149]

H148C. Does it amount to less than \$100,000, more than \$100,000, or what?

- 1. LESS THAN \$100,000 [H149]
- 3. ABOUT \$100,000 [H149]
- 5. MORE THAN \$100,000 [H148D]
- 2. DK [H149]
- 1. RF [H149]

H148D. Does it amount to less than \$400,000, more than \$400,000, or what?

- 1. LESS THAN \$400,000 [H149]
- 3. ABOUT \$400,000 [H149]
- 5. MORE THAN \$400,000 [H149]
- 2. DK [H149]
- 1. RF [H149]

RANDOM ASSIGNMENT 2:

H148B. Does it amount to less than \$25,000, more than \$25,000, or what?

- 1. LESS THAN \$25,000 [H148A]
- 3. ABOUT \$25,000 [H149]
- 5. MORE THAN \$25,000 [H148C]
- 2. DK [H149]
- 1. RF [H149]

H148C. Does it amount to less than \$100,000, more than \$100,000, or what?

- 1. LESS THAN \$100,000 [H149]
- 3. ABOUT \$100,000 [H149]
- 5. MORE THAN \$100,000 [H148D]
- 2. DK [H149]
- 1. RF [H149]

H148D. Does it amount to less than \$400,000, more than \$400,000, or what?

- 1. LESS THAN \$400,000 [H149]
- 3. ABOUT \$400,000 [H149]

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- 5. MORE THAN \$400,000 [H149]
- 2. DK [H149]
- 1. RF [H149]

H148A. Does it amount to less than \$10,000, more than \$10,000, or what?

- 1. LESS THAN \$10,000 [H149]
- 3. ABOUT \$10,000 [H149]
- 5. MORE THAN \$10,000 [H149]
- 2. DK [H149]
- 1. RF [H149]

RANDOM ASSIGNMENT 3:

H148C. Does it amount to less than \$100,000, more than \$100,000, or what?

- 1. LESS THAN \$100,000 [H148B]
- 3. ABOUT \$100,000 [H149]
- 5. MORE THAN \$100,000 [H148D]
- 2. DK [H149]
- 1. RF [H149]

H148D. Does it amount to less than \$400,000, more than \$400,000, or what?

- 1. LESS THAN \$400,000 [H149]
- 3. ABOUT \$400,000 [H149]
- 5. MORE THAN \$400,000 [H149]
- 2. DK [H149]
- 1. RF [H149]

H148B. Does it amount to less than \$25,000, more than \$25,000, or what?

- 1. LESS THAN \$25,000 [H148A]
- 3. ABOUT \$25,000 [H149]
- 5. MORE THAN \$25,000 [H149]
- 2. DK [H149]
- 1. RF [H149]

H148A. Does it amount to less than \$10,000, more than \$10,000, or what?

- 1. LESS THAN \$10,000 [H149]
- 3. ABOUT \$10,000 [H149]
- 5. MORE THAN \$10,000 [H149]
- 2. DK [H149]
- 1. RF [H149]

H149. Is the money in these accounts invested mostly in stocks, mostly in interest-earning assets, is it about evenly split between these, or what?

- 1. MOSTLY OR ALL STOCKS [H150]
- 2. MOSTLY OR ALL INTEREST EARNING [H150]
- 3. EVENLY SPLIT [H150]
- 97. OTHER [H149A]

H149A. (specify) _____ {80 characters}[H150]

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-2. DK [H150]

-1. RF [H150]

H150. Did you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} receive any income in the last twelve months from any of your IRA or KEOGH accounts?

1. YES [H151]

2. NO [H153]

-2. DK [H153]

-1. RF [H153]

H151. Before taxes and other deductions, about how much income did you receive from these IRA and/or KEOGH accounts in the last twelve months?

[IWER: WE WANT THE AMOUNT BEFORE ANY DEDUCTIONS.]

[IWER: DO NOT PROBE DK]

[IWER: AMOUNT IN U.S. DOLLARS]

\$ _____ {15-digits}[H153]

-2. DK [H152A]

-1. RF [H152A]

H152A. Did it amount to less than \$5,000, more than \$5,000, or what?

1. LESS THAN \$5,000 [H152C]

2. ABOUT \$5,000 [H153]

3. MORE THAN \$5,000 [H152B]

-2. DK [H153]

-1. RF [H153]

H152B. Did it amount to less than \$25,000, more than \$25,000, or what?

1. LESS THAN \$25,000 [H153]

2. ABOUT \$25,000 [H153]

3. MORE THAN \$25,000 [H153]

-2. DK [H153]

-1. RF [H153]

H152C. Did it amount to less than \$1,000, more than \$1,000, or what?

1. LESS THAN \$1,000 [H153]

2. ABOUT \$1,000 [H153]

3. MORE THAN \$1,000 [H153]

-2. DK [H153]

-1. RF [H153]

Time Stamp

H153. Do you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} currently have any money or assets that are held in a tax favored or tax protected savings account **in a foreign country** that you have not already told us about?

1. YES [H154]

2. NO [H160]

-2. DK [H160]

-1. RF [H160]

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H154. About how much are in these tax favored or tax protected savings accounts at the present time?
[IWER: DO NOT PROBE DK/RF]

\$ _____ {15-digits}[H154A]
-2. DK [ASSIGN RANDOM #1-3: H155A/RANDOM ASSIGNMENT]
-1. RF [ASSIGN RANDOM #1-3: H155A/RANDOM ASSIGNMENT]

H154A. Currency _____
{Pick list, US\$ first; allow only one choice}[H156; If OTHER, H154B]

H154B. Currency (other specify) _____ {30 characters}[H156]

RANDOM ASSIGNMENT 1:

H155A. Does it amount to less than \$10,000, more than \$10,000, or what?

- 1. LESS THAN \$10,000 [H156]
- 3. ABOUT \$10,000 [H156]
- 5. MORE THAN \$10,000 [H155B]
- 2. DK [H156]
- 1. RF [H156]

H155B. Does it amount to less than \$25,000, more than \$25,000, or what?

- 1. LESS THAN \$25,000 [H156]
- 3. ABOUT \$25,000 [H156]
- 5. MORE THAN \$25,000 [H155C]
- 2. DK [H156]
- 1. RF [H156]

H155C. Does it amount to less than \$100,000, more than \$100,000, or what?

- 1. LESS THAN \$100,000 [H156]
- 3. ABOUT \$100,000 [H156]
- 5. MORE THAN \$100,000 [H155D]
- 2. DK [H156]
- 1. RF [H156]

H155D. Does it amount to less than \$400,000, more than \$400,000, or what?

- 1. LESS THAN \$400,000 [H156]
- 3. ABOUT \$400,000 [H156]
- 5. MORE THAN \$400,000 [H156]
- 2. DK [H156]
- 1. RF [H156]

RANDOM ASSIGNMENT 2:

H155B. Does it amount to less than \$25,000, more than \$25,000, or what?

- 1. LESS THAN \$25,000 [H155A]
- 3. ABOUT \$25,000 [H156]
- 5. MORE THAN \$25,000 [H155C]
- 2. DK [H156]

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-1. RF [H156]

H155C. Does it amount to less than \$100,000, more than \$100,000, or what?

- 1. LESS THAN \$100,000 [H156]
- 3. ABOUT \$100,000 [H156]
- 5. MORE THAN \$100,000 [H155D]
- 2. DK [H156]
- 1. RF [H156]

H155D. Does it amount to less than \$400,000, more than \$400,000, or what?

- 1. LESS THAN \$400,000 [H156]
- 3. ABOUT \$400,000 [H156]
- 5. MORE THAN \$400,000 [H156]
- 2. DK [H156]
- 1. RF [H156]

H155A. Does it amount to less than \$10,000, more than \$10,000, or what?

- 1. LESS THAN \$10,000 [H156]
- 3. ABOUT \$10,000 [H156]
- 5. MORE THAN \$10,000 [H156]
- 2. DK [H156]
- 1. RF [H156]

RANDOM ASSIGNMENT 3:

H155C. Does it amount to less than \$100,000, more than \$100,000, or what?

- 1. LESS THAN \$100,000 [H155B]
- 3. ABOUT \$100,000 [H156]
- 5. MORE THAN \$100,000 [H155D]
- 2. DK [H156]
- 1. RF [H156]

H155D. Does it amount to less than \$400,000, more than \$400,000, or what?

- 1. LESS THAN \$400,000 [H156]
- 3. ABOUT \$400,000 [H156]
- 5. MORE THAN \$400,000 [H156]
- 2. DK [H156]
- 1. RF [H156]

H155B. Does it amount to less than \$25,000, more than \$25,000, or what?

- 1. LESS THAN \$25,000 [H155A]
- 3. ABOUT \$25,000 [H156]
- 5. MORE THAN \$25,000 [H156]
- 2. DK [H156]
- 1. RF [H156]

H155A. Does it amount to less than \$10,000, more than \$10,000, or what?

- 1. LESS THAN \$10,000 [H156]
- 3. ABOUT \$10,000 [H156]

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- 5. MORE THAN \$10,000 [H156]
- 2. DK [H156]
- 1. RF [H156]

H156. Is the money in these accounts invested mostly in stocks, mostly in interest-earning assets, is it about evenly split between these, or what?

- 1. MOSTLY OR ALL STOCKS [H157]
- 2. MOSTLY OR ALL INTEREST EARNING [H157]
- 3. EVENLY SPLIT [H157]
- 97. OTHER [H156A]

H156A. (specify)_____ {80 characters}[H157]

- 2. DK [H157]
- 1. RF [H157]

H157. Did you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} receive any income in the last twelve months from any of these tax favored or tax protected savings accounts?

- 1. YES [H158]
- 2. NO [H160]
- 2. DK [H160]
- 1. RF [H160]

H158. Before taxes and other deductions, about how much income did you receive from these tax favored or tax protected savings accounts in the last twelve months?

[IWER: WE WANT THE AMOUNT BEFORE ANY DEDUCTIONS.]
[IWER: DO NOT PROBE DK]

\$_____ {15-digits}[H158A]

- 2. DK [H159A]
- 1. RF [H159A]

H158A. Currency_____

{Pick list, US\$ first; allow only one choice}[H160; If OTHER, H159B]

H158B. Currency (other specify)_____ {30 characters}[H160]

H159A. Did it amount to less than \$5,000, more than \$5,000, or what?

- 1. LESS THAN \$5,000 [H159C]
- 2. ABOUT \$5,000 [H160]
- 3. MORE THAN \$5,000 [H159B]
- 2. DK [H160]
- 1. RF [H160]

H159B. Did it amount to less than \$25,000, more than \$25,000, or what?

- 1. LESS THAN \$25,000 [H160]
- 2. ABOUT \$25,000 [H160]
- 3. MORE THAN \$25,000 [H160]
- 2. DK [H160]
- 1. RF [H160]

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H159C. Did it amount to less than \$1,000, more than \$1,000, or what?

- 1. LESS THAN \$1,000 [H160]
- 2. ABOUT \$1,000 [H160]
- 3. MORE THAN \$1,000 [H160]
- 2. DK [H160]
- 1. RF [H160]

Time Stamp

H160. And do you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} have any debts that we haven't asked about, such as credit card balances, medical debts, life insurance policy loans, loans from relatives, student loans, and so forth?

[IWER: DO NOT INCLUDE LOANS FOR TRANSPORTATION]

- 1. YES [H161]
- 2. NO [H164]
- 2. DK [H164]
- 1. RF [H164]

H161. Altogether, about how much would that amount to?

[IWER: DO NOT PROBE DK/RF]

\$ _____ {15-digits}[H161A]

- 2. DK [ASSIGN RANDOM #1-3: H162A/RANDOM ASSIGNMENT]
- 1. RF [ASSIGN RANDOM #1-3: H162A/RANDOM ASSIGNMENT]

H161A. Currency _____

{Pick list, US\$ first; allow only one choice}{H163; if OTHER, H161B}

H161B. Currency (other specify) _____ {30 characters}[H163]

RANDOM ASSIGNMENT 1:

H162A. Does it amount to less than \$500 more than \$500, or what?

- 1. LESS THAN \$500 [H163]
- 3. ABOUT \$500 [H163]
- 5. MORE THAN \$500 [H162B]
- 2. DK [H163]
- 1. RF [H163]

H162B. Does it amount to less than \$5,000, more than \$5,000, or what?

- 1. LESS THAN \$5,000 [H163]
- 3. ABOUT \$5,000 [H163]
- 5. MORE THAN \$5,000 [H162C]
- 2. DK [H163]
- 1. RF [H163]

H162C. Does it amount to less than \$50,000, more than \$50,000, or what?

- 1. LESS THAN \$50,000 [H163]
- 3. ABOUT \$50,000 [H163]
- 5. MORE THAN \$50,000 [H163]
- 2. DK [H163]

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-1. RF [H163]

RANDOM ASSIGNMENT 2:

H162B. Does it amount to less than \$5,000, more than \$5,000, or what?

- 1. LESS THAN \$5,000 [H162A]
- 3. ABOUT \$5,000 [H163]
- 5. MORE THAN \$5,000 [H162C]
- 2. DK [H163]
- 1. RF [H163]

H162C. Does it amount to less than \$50,000, more than \$50,000, or what?

- 1. LESS THAN \$50,000 [H163]
- 3. ABOUT \$50,000 [H163]
- 5. MORE THAN \$50,000 [H163]
- 2. DK [H163]
- 1. RF [H163]

H162A. Does it amount to less than \$500, more than \$500, or what?

- 1. LESS THAN \$500 [H163]
- 3. ABOUT \$500 [H163]
- 5. MORE THAN \$500 [H163]
- 2. DK [H163]
- 1. RF [H163]

RANDOM ASSIGNMENT 3:

H162C. Does it amount to less than \$50,000, more than \$50,000, or what?

- 1. LESS THAN \$50,000 [H162B]
- 3. ABOUT \$50,000 [H163]
- 5. MORE THAN \$50,000 [H163]
- 2. DK [H163]
- 1. RF [H163]

H162B. Does it amount to less than \$5,000, more than \$5,000, or what?

- 1. LESS THAN \$5,000 [H162A]
- 3. ABOUT \$5,000 [H163]
- 5. MORE THAN \$5,000 [H163]
- 2. DK [H163]
- 1. RF [H163]

H162A. Does it amount to less than \$500, more than \$500, or what?

- 1. LESS THAN \$500 [H163]
- 3. ABOUT \$500 [H163]
- 5. MORE THAN \$500 [H163]
- 2. DK [H163]
- 1. RF [H163]

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H163_X. **{REPEAT FOR UP TO 7 LOANS}**{Text fill: FIRST ITERATION ONLY: For each of these other debts, I would like to ask you the following questions.}{Text fill: FIRST ITERATION ONLY: Starting with the oldest loan you currently have, in what year did you incur this debt?}{Text fill: SECOND THROUGH SEVENTH ITERATIONS ONLY: In what year did you incur the next debt?}

YEAR: _____ {4 digits: check DOB to present}[H163A_X].

- 2. DK [H163A_X]
- 1. RF [H163A_X]

H163A_X. How much did you borrow?

\$ _____ {15-digits}[H163B_X]

- 2. DK [H163D_X]
- 1. RF [H163D_X]

H163B_X. CURRENCY _____ (PICK LIST, US\$ FIRST, ALLOW ONLY ONE CHOICE){H163D_X; IF H163B_X=OTHER: [H163C_X]}

H163C_X. CURRENCY (other specify) _____ {30 CHARACTERS}[H163D_X]

H163D_X. How much {Text fill: in CURRENCY FROM H163B_X OR H163C_X; if H163B_X or H163C_X = -1 or -2: “ ”} do you still owe?

\$ _____ {15-digits}[H163E_X]

- 2. DK [H163E_X]
- 1. RF [H163E_X]

H163E_X. Who did you borrow this from?

- 1. RELATIVE [H163G_X]
- 2. CURRENT EMPLOYER [H163S_X]
- 3. PAST EMPLOYER [H163S_X]
- 4. BANK [H163S_X]
- 5. ROTATING CREDIT SOCIETY [H163S_X]
- 6. CREDIT CARD [H163S_X]
- 97. OTHER SPECIFY [H163F_X]
- 2. DK [H163S_X]
- 1. RF [H163S_X]

H163F_X. OTHER (SPECIFY) _____ {80 CHARACTERS}[H163S_X]

- 2. DK [H163S_X]
- 1. RF [H163S_X]

H163G_X. Is this someone that you have already told us about?

- 1. YES [H163H_X]
- 2. NO [H163I_X]
- 2. DK [H163I_X]
- 2. RF [H163I_X]

H163H_X. Who? **{PULL NON-RESIDENT AND CO-RESIDENT ROSTERS, IF NOT ON ROSTER OR DK/REF GO TO H163I_X. IF ON ROSTER: CODE THEN GO TO H163S_X}**

{SELECT NAME FROM ROSTER} [H163S_X; IF NAME NOT ON ROSTER: H163I_X]

- 1. REFUSED [H163I_X]
- 2. DON'T KNOW [H163I_X]

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H163I_X. Could you please give me the full name of this person, starting with the family name?

(_____)[MAX RANGE=40] 1 [H163J_X]
 REFUSED.....-1 [H163J_X]
 DON'T KNOW.....-2 [H163J_X]

H163J_X. What is that person's given, or first name

(_____)[MAX RANGE=40] 1 [H163M_X]
 REFUSED.....-1 [H163M_X]
 DON'T KNOW.....-2 [H163M_X]

H163M_X. What is [name fill from H163J_X; IF H163J_X =-1, -2 / this person]'s relationship to you?

[RELATIONSHIP PICK LIST][H163O_X]
 OTHER SPECIFY97 [H163N_X]
 REFUSED.....-1 [H163O_X]
 DON'T KNOW.....-2 [H163O_X]

H163N_X. OTHER (SPECIFY) (_____)[MAX RANGE=30] [H163O_X]
 REFUSED.....-1 [H163O_X]
 DON'T KNOW.....-2 [H163O_X]

H163O_X. CODE FROM H29E IF POSSIBLE. OTHERS: INTERVIEWER: IF NECESSARY. I can't always tell from a name, is [name fill from H163J_X; IF H163J_X =-1,-2 / this person] male or female?

MALE 1 [H163P_X]
 FEMALE.....2 [H163P_X]
 REFUSED.....-1 [H163P_X]
 DON'T KNOW.....-2 [H163P_X]

H163P_X. In what year was [name fill from H163J_X; IF H163J_X =-1,-2 / this person] born?

YEAR: #### [SOFT CHECK RANGE: 1890 TO PRESENT] [H163Q_X]
 REFUSED.....-1 [H163Q_X]
 DON'T KNOW.....-2 [H163Q_X]

H163Q_X. In what country was [he/she/he or she] born?

[COUNTRY PICKLIST] [H163S_X]
 OTHER SPECIFY97 [H163R_X]
 REFUSED.....-1 [H163S_X]
 DON'T KNOW.....-2 [H163S_X]

H163R_X. OTHER SPECIFY (_____)[MAX=30] [H163S_X]
 REFUSED.....-1 [H163S_X]
 DON'T KNOW.....-1 [H163S_X]

H163S_X. In what country is this loan held?

[IWER: IF LENDER IS PERSON - WHERE THAT PERSON IS LIVING. IF LENDER IS INSTITUTION - WHERE THAT INSTITUTION IS LOCATED]

COUNTRY_____ {Pick list, US first}[H163U_X; IF OTHER, H163T_X]
 -2. DK [H163U_X]
 -1. RF [H163U_X]

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H163T_X. COUNTRY (other specify)_____ {30 characters}[H163U_X]

- 2. DK [H163U_X]
- 1. RF [H163U_X]

H163U_X. What is the current interest rate on that loan?

% _____ {3 digits plus two decimals}% [H163V_X]

- 2. DK [H163V_X]
- 1. RF [H163V_X]

H163V_X. What is the total length of that loan?

_____ {3 DIGITS PLUS 2 DECIMALS}[H163W_X]

- 2. DK [H163Y_X]
- 1. RF [H163Y_X]

H163W_X. UNITS:

- 1. WEEKS [H163Y_X]
- 2. MONTHS [H163Y_X]
- 3. YEARS [H163Y_X]
- 97. OTHER [H163X_X]
- 2. DK [H163Y_X]
- 1. RF [H163Y_X]

H163X_X. OTHER (SPECIFY)_____ {30 characters}[H163Y_X]

H163Y_X. Do you currently have another loan that you have not told me about?

- 1. YES [H163_X; IF NUMBER OF ITERATIONS=7: H164]
- 2. NO [H164]
- 2. DK [H164]
- 1. RF [H164]

Time Stamp

H164. Other than income you have already told me about, did you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} receive any income from trust funds or royalties in the last twelve months?

- 1. YES [H165]
- 2. NO [H166]
- 2. DK [H166]
- 1. RF [H166]

H165. Before taxes and other deductions, how much did you {Text fill IF A52=1 OR 2: "and your" husband/wife/partner/spouse or partner} receive altogether in the last twelve months?
[IWER: WE WANT THE AMOUNT BEFORE ANY DEDUCTIONS.]

\$ _____ {15-digits}[H165A]

- 2. DK [H166]
- 1. RF [H166]

H165A. Currency _____ {Pick list, US\$ first}[H166; If OTHER, H165B]

H165B. Currency (other specify)_____ {30 characters}[H166]

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H166. Other than income you have already told me about, did you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} receive any income from alimony or child support payments?

- 1. YES [H167]
- 2. NO [H168]
- 2. DK [H168]
- 1. RF [H168]

H167. How much did you {Text fill IF A52=1 OR 2: "and your" husband/wife/partner/spouse or partner} receive altogether from these sources in the last twelve months?

\$ _____ {15-digits}[H167A]

- 2. DK [H168]
- 1. RF [H168]

H167A. Currency _____ {Pick list, US\$ first}{H168; If OTHER, H167B}

H167B. Currency (other specify) _____ {30 characters}[H168]

H168. Other than income you have already told me about, did you {Text fill IF A52=1 OR 2: "and your" husband/wife/partner/spouse or partner} receive any other income in the last twelve months, for example, from odd jobs, consulting fees, and so forth?

[IWER: DO NOT INCLUDE FINANCIAL SUPPORT FROM RELATIVES OR FRIENDS.]

- 1. YES [H169]
- 2. NO [H170]
- 2. DK [H170]
- 1. RF [H170]

H169. Before taxes and other deductions, how much did you {Text fill IF A52=1 OR 2: "and your" husband/wife/partner/spouse or partner} receive altogether from these other sources in the last twelve months?
[IWER: WE WANT THE AMOUNT BEFORE ANY DEDUCTIONS.]

\$ _____ {15-digits}[H169A]

- 2. DK [H170]
- 1. RF [H170]

H169A. Currency _____ {Pick list, US\$ first}{H170; If OTHER, H169B}

H169B. Currency (other specify) _____ {30 characters}[H170]

H170. Did you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} receive U.S. government food stamps or participate in the Supplemental Food Program for Women, Infants, and Children, also called WIC at any time during the last twelve months?

- 1. YES [H171]
- 2. NO [H174]
- 2. DK [H174]
- 1. RF [H174]

H171. How many dollars' worth of food stamps did you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} receive during the last twelve months?

[IWER: AMOUNT IN U.S. DOLLARS]

\$ _____ {5-digits}[H172]

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- 2. DK [H172]
- 1. RF [H172]

H172. Did you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} receive government food stamps at any time during the last month?

- 1. YES [H173]
- 2. NO [H174]
- 2. DK [H174]
- 1. RF [H174]

H173. How many dollars' worth of food stamps did you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} receive last month?

\$ _____{4-digits}[H174]

- 2. DK [H174]
- 1. RF [H174]

Time Stamp

H174. Are you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} currently receiving any income from firm or occupational retirement pensions? Do not include any pensions from working for the government. [IWER: THIS EXCLUDES STATE AND LOCAL GOVERNMENTS AS WELL.] [IWER: DO NOT INCLUDE ANY LUMP-SUM PENSION PAYMENTS. DO NOT INCLUDE ANY MILITARY PENSION REPORTED EARLIER.]

- 1. YES [H175]
- 2. NO [H182]
- 2. DK [H182]
- 1. RF [H182]

H175. **{IF A52 IS NOT 1 OR 2, ASSIGN 1 FOR H175 AND GO TO H176}**

Who receives that?

- 1. RESPONDENT ONLY [H176]
- 2. SPOUSE/PARTNER ONLY [H176]
- 3. BOTH [H176]
- 2. DK [H176]
- 1. RF [H176]

H176_X. **{R FIRST, THEN SPOUSE}**

{Text fill: If H175=3: "First I will ask about your retirement pensions, then about your" husband's/wife's/partner's/spouse or partner's.} {Text fill: If H175=1 or 3: "Do you yourself"} {Text fill: If H175=2 or 3, SECOND ITERATION: "Does your spouse"} {Text fill: If H175=-2 or -1: "Do you or your" husband/wife/partner/spouse or partner} receive income from more than one firm or occupational retirement pension?

- 1. YES [H177]
- 2. NO [H177]
- 2. DK [IF H175=3: SECOND ITERATION OR H177]
- 1. RF [IF H175=3: SECOND ITERATION OR H177]

H177_X. {Text fill: IF H176=1, -2, OR -1: "Are these retirement pensions held in the United States, a foreign country, or both?"} {Text fill: IF H176=2: "Is this retirement pension held in the United States or a foreign country?"}

- 1. UNITED STATES ONLY [H180]
- 2. UNITED STATES AND FOREIGN COUNTRY [H179]

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- 3. FOREIGN COUNTRY ONLY [H179]
- 2. DK [H180]
- 1. RF [H180]

H179_X. In what main country {Text fill: IF H176=1, -2, OR -1: "are these pensions"}{Text fill: IF H176=2:"is this pension"} held?

COUNTRY_____ {Pick list}[H180; IF H179="OTHER": H179A]

- 2. DK [H180]
- 1. RF [H180]

H179A. COUNTRY (other specify)_____ {30 characters}[H180]

- 2. DK [H180]
- 1. RF [H180]

H180_X. {If H177=1, 2, or 3: H180 through H181D; US FIRST, THEN FOREIGN; If H177= -1 or -2: H180 through H181D, no reference to US/Foreign}

Before taxes and other deductions, how much did {Text fill: If H175=1 or 3: "you"} {Text fill: If H175=2 or 3, SECOND ITERATION: "your spouse"} {Text fill: If H175=-2 or -1: "you or your" husband/wife/partner/spouse or partner} receive last month from all {Text fill: US/foreign "firm or occupational"; if H177= -1 or -2, "firm or occupational"} pensions?
[IWER: WE WANT THE AMOUNT BEFORE ANY DEDUCTIONS.]
[IWER: DO NOT PROBE DK]

\$_____ {15-digits}[H180A_X]

- 2. DK [H181A]
- 1. RF [H181A]

H180A_X. Currency_____ {Pick list, US\$ first}[H182; If OTHER, H180B]

H180B_X Currency (other specify)_____ {30 characters}[H182]

H181A_X. Did it amount to less than \$1,000, more than \$1,000, or what?

- 1. LESS THAN \$1,000 [H181D]
- 2. ABOUT \$1,000 [REPEAT FOR FOREIGN OR H182]
- 3. MORE THAN \$1,000 [H181B]
- 2. DK [REPEAT FOR FOREIGN OR H182]
- 1. RF [REPEAT FOR FOREIGN OR H182]

H181B_X. Did it amount to less than \$2,000, more than \$2,000, or what?

- 1. LESS THAN \$2,000 [REPEAT FOR FOREIGN OR H182]
- 2. ABOUT \$2,000 [REPEAT FOR FOREIGN OR H182]
- 3. MORE THAN \$2,000 [H181C]
- 2. DK [REPEAT FOR FOREIGN OR H182]
- 1. RF [REPEAT FOR FOREIGN OR H182]

H181C_X. Did it amount to less than \$4,000, more than \$4,000, or what?

- 1. LESS THAN \$4,000 [REPEAT FOR FOREIGN OR H182]
- 2. ABOUT \$4,000 [REPEAT FOR FOREIGN OR H182]
- 3. MORE THAN \$4,000 [REPEAT FOR FOREIGN OR H182]
- 2. DK [REPEAT FOR FOREIGN OR H182]
- 1. RF [REPEAT FOR FOREIGN OR H182]

H181D_X. Did it amount to less than \$500, more than \$500, or what?

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1. LESS THAN \$500 [REPEAT FOR FOREIGN OR H182]
2. ABOUT \$500 [REPEAT FOR FOREIGN OR H182]
3. MORE THAN \$500 [REPEAT FOR FOREIGN OR H182]
- 2. DK [REPEAT FOR FOREIGN OR H182]
- 1. RF [REPEAT FOR FOREIGN OR H182]

H182. Are you {Text fill: "or your" husband/wife/partner/spouse or partner} currently receiving any income from a state, local, or federal government pension in the United States or from a pension from working for a government in a foreign country?

[IWER: DO NOT INCLUDE ANY LUMP-SUM PENSION PAYMENTS. DO NOT INCLUDE ANY MILITARY PENSION REPORTED EARLIER.]

1. YES[H183]
2. NO [H186]
- 2. DK [H186]
- 1. RF [H186]

H183. **{IF A52 IS NOT 1 OR 2, ASSIGN 1 FOR H175 AND GO TO H176}**

Who receives that?

1. RESPONDENT ONLY [H184]
2. SPOUSE/PARTNER ONLY [H184]
3. BOTH [H184]
- 2. DK [H184]
- 1. RF[H184]

H184_X. **{If H183=1, 2, or 3, thenH184 through H199D; R FIRST, THEN SPOUSE}**

{Text fill: If H183=3: "First I will ask about your retirement pensions, then about your" husband's/wife's/partner's/spouse or partner's.} {Text fill: If H183=1 or 3: "Do you yourself"} {Text fill: If H183=2 or 3: "Does your spouse"} {Text fill: If H183=2 or -1: "Do you or your" husband/wife/partner/spouse or partner} receive income from more than one retirement pension?

1. YES [H185]
2. NO [H185]
- 2. DK [H185]
- 1. RF [H185]

H185_X. {Text fill: IF H184=1, -2, OR -1: "Are these retirement pensions"} {Text fill: IF H184=2: "Is this retirement pension"} held in the United States, a foreign country, or both?

1. UNITED STATES ONLY [H186]
2. UNITED STATES AND FOREIGN COUNTRY [H186]
3. FOREIGN COUNTRY ONLY [H187]
- 2. DK [H188]
- 1. RF [H188]

H186_X. In what main state are these pensions held?

STATE CODE: (__) [MAX =2] {IF H185=1, [H188]; IF H185=2, [H187]}

- 2. DK {IF H185=1, [H188]; IF H185=2, [H187]}
- 1. RF {IF H185=1, [H188]; IF H185=2, [H187]}

H187_X. In what main country {Text fill: IF H184=1, -2, OR -1: "are these pensions"}{Text fill: IF H184=1:"is this pension"} held?

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COUNTRY _____ {Pick list, US first}[H188; IF H187_X="OTHER": H187A_X]

- 2. DK [H188]
- 1. RF [H188]

H187A_X. COUNTRY (other specify) _____ {30 characters}[H188]

- 2. DK [H188]
- 1. RF [H188]

H188_X. {If H185=1, 2, or 3, then H188 through H189D_X; US FIRST, THEN FOREIGN}

Before taxes and other deductions, how much did {Text fill: If H185=1 or 3: "you"} {Text fill: If H185=2 or 3: "your spouse"} {Text fill: If H185=-2 or -1: "you or your" husband/wife/partner/spouse or partner} receive last month from all {Text fill: US/foreign "government"} pensions?

[IWER: WE WANT THE AMOUNT BEFORE ANY DEDUCTIONS.]

[IWER: DO NOT PROBE DK]

\$ _____ {15-digits}[H188A_X]

- 2. DK [H189A_X]
- 1. RF [H189A_X]

H188A_X. Currency _____ {Pick list, US\$ first}[H190; If OTHER, H188B]

H188B_X. Currency (other specify) _____ {30 characters}[H190]

H189A_X. Did it amount to less than \$1,000, more than \$1,000, or what?

- 1. LESS THAN \$1,000 [H189D_X]
- 2. ABOUT \$1,000 [H190]
- 3. MORE THAN \$1,000 [H189B_X]
- 2. DK [H190]
- 1. RF [H190]

H189B_X. Did it amount to less than \$2,000, more than \$2,000, or what?

- 1. LESS THAN \$2,000 [H190]
- 2. ABOUT \$2,000 [H190]
- 3. MORE THAN \$2,000 [H189C_X]
- 2. DK [H190]
- 1. RF [H190]

H189C_X. Did it amount to less than \$4,000, more than \$4,000, or what?

f

- 1. LESS THAN \$4,000 [H190]
- 2. ABOUT \$4,000 [H190]
- 3. MORE THAN \$4,000 [H190]
- 2. DK [H190]
- 1. RF [H190]

H189D_X. Did it amount to less than \$500, more than \$500, or what?

- 1. LESS THAN \$500 [H190]
- 2. ABOUT \$500 [H190]
- 3. MORE THAN \$500 [H190]
- 2. DK [H190]
- 1. RF [H190]

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Time Stamp

H190. Aside from anything you have already told me about, are you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} currently receiving any income from annuities?
[IWER: DO NOT INCULDE SOCIAL SECURITY.]

- 1. YES [H191]
- 2. NO [H194]
- 2. DK [H194]
- 1. RF [H194]

H191. Before taxes and other deductions, how much did you {Text fill IF A52=1 OR 2: "and your" husband/wife/partner/spouse or partner} receive last month from all annuities?
[IWER: WE WANT THE AMOUNT BEFORE ANY DEDUCTIONS.]
[IWER: ENTER 0 IF ANNUITY PAYMENTS HAVE NOT YET STARTED]
[IWER: DO NOT PROBE DK]

\$ _____{15-digits}[H191A]

- 2. DK [H193]
- 1. RF [H193]

H191A. Currency _____{Pick list, US\$ first}[H193; If OTHER, H191B]

H191B. Currency (other specify) _____{30 characters}[H193]

H192A. Did it amount to less than \$1,000, more than \$1,000, or what?

- 1. LESS THAN \$1,000 [H192D]
- 2. ABOUT \$1,000 [H193]
- 3. MORE THAN \$1,000 [H192B]
- 2. DK [H193]
- 1. RF [H193]

H192B. Did it amount to less than \$2,000, more than \$2,000, or what?

- 1. LESS THAN \$2,000 [H193]
- 2. ABOUT \$2,000 [H193]
- 3. MORE THAN \$2,000 [H192C]
- 2. DK [H193]
- 1. RF [H193]

H192C. Did it amount to less than \$4,000, more than \$4,000, or what?

- 1. LESS THAN \$4,000 [H193]
- 2. ABOUT \$4,000 [H193]
- 3. MORE THAN \$4,000 [H193]
- 2. DK [H193]
- 1. RF [H193]

H192D. Did it amount to less than \$500, more than \$500, or what?

- 1. LESS THAN \$500 [H193]
- 2. ABOUT \$500 [H193]
- 3. MORE THAN \$500 [H193]

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- 2. DK [H193]
- 1. RF [H193]

H193. In what year did you start to receive that annuity payment?

YEAR
{4-digits}{check: DOB – PRESENT}
-2. DK
-1. RF

{If H193 = 2001, 2002, or 2003: H193A; If H193 < 2001: H194}

H193A. Which month was that?

- 1. JAN [H194]
- 2. FEB [H194]
- 3. MAR [H194]
- 4. APR [H194]
- 5. MAY [H194]
- 6. JUN [H194]
- 7. JUL [H194]
- 8. AUG [H194]
- 9. SEP [H194]
- 10. OCT [H194]
- 11. NOV [H194]
- 12. DEC [H194]
- 2. DK [H194]
- 1. RF [H194]

{BEGINNING OF LOOP – REPEAT FOR ALL CO-RESIDENT HH MEMBERS BESIDES R AND SPOUSE ABOVE AGE 16}

H194_XX. **{IF NO OTHER MEMBERS OF HH ABOVE AGE 16 EXCEPT R AND SPOUSE/PARTNER, GO TO H200}{MAX ITERATIONS: 30}**

During the last twelve months, did {Text fill: HOUSEHOLD MEMBER FIRST NAME} do any work for pay?

- 1. YES [H195]
- 2. NO [NEXT HH MEMBER OR H198]
- 2. DK [NEXT HH MEMBER OR H198]
- 1. RF [NEXT HH MEMBER OR H198]

H195_XX. Before taxes and other deductions, about how much money did {Text fill: he/she} earn from all jobs in the last twelve months?

[IWER: DO NOT INCLUDE JOB INCOME OF R OR SPOUSE]

[IWER: DO NOT PROBE DK]

\$ _____ {15-digits}[H195A_XX]

- 2. DK [H197A]
- 1. RF [H197A]

H195A_XX. Currency _____ {Pick list, US\$ first}{NEXT HH MEMBER OR H198; If OTHER, H196B}

H196B_XX. Currency (other specify) _____ {30 characters}[NEXT HH MEMBER OR H198]

H197A_XX. Did it amount to less than \$5,000, more than \$5,000, or what?

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1. LESS THAN \$5,000 [H197D]
2. ABOUT \$5,000 [NEXT HH MEMBER OR H198]
3. MORE THAN \$5,000 [H197B]
- 2. DK [NEXT HH MEMBER OR H198]
- 1. RF [NEXT HH MEMBER OR H198]

H197B_XX. Did it amount to less than \$25,000, more than \$25,000, or what?

1. LESS THAN \$25,000 [NEXT HH MEMBER OR H198]
2. ABOUT \$25,000 [NEXT HH MEMBER OR H198]
3. MORE THAN \$25,000 [H197C]
- 2. DK [NEXT HH MEMBER OR H198]
- 1. RF [NEXT HH MEMBER OR H198]

H197C_XX. Did it amount to less than \$50,000, more than \$50,000, or what?

1. LESS THAN \$50,000 [NEXT HH MEMBER OR H198]
2. ABOUT \$50,000 [NEXT HH MEMBER OR H198]
3. MORE THAN \$50,000 [NEXT HH MEMBER OR H198]
- 2. DK [NEXT HH MEMBER OR H198]
- 1. RF [NEXT HH MEMBER OR H198]

H197D_XX. Did it amount to less than \$2,000, more than \$2,000, or what?

1. LESS THAN \$2,000 [NEXT HH MEMBER OR H198]
2. ABOUT \$2,000 [NEXT HH MEMBER OR H198]
3. MORE THAN \$2,000 [NEXT HH MEMBER OR H198]
- 2. DK [NEXT HH MEMBER OR H198]
- 1. RF [NEXT HH MEMBER OR H198]

H198. Not including job income and before taxes and other deductions, about how much in total did other members of your family living in this household receive in the last twelve months from all other income sources?

[IWER: WE WANT THE AMOUNT BEFORE ANY DEDUCTIONS.]

[IWER: DO NOT PROBE DK]

[IWER: IF NOTHING, ENTER "0"]

\$_____ {15-digits}[H198A; IF H198=0: H200]

- 2. DK [H199A]
- 1. RF [H199A]

H198A. Currency_____ {Pick list, US\$ first}[H200; If OTHER, H198B]

H198B. Currency (other specify)_____ {30 characters}[H200]

H199A. Did it amount to less than \$10,000, more than \$10,000, or what?

1. LESS THAN \$10,000 [H199D]
2. ABOUT \$10,000 [H200]
3. MORE THAN \$10,000 [H199B]
- 2. DK [H200]
- 1. RF [H200]

H199B. Did it amount to less than \$20,000, more than \$20,000, or what?

1. LESS THAN \$20,000 [H200]
2. ABOUT \$20,000 [H200]

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- 3. MORE THAN \$20,000 [H199C]
- 2. DK [H200]
- 1. RF [H200]

H199C. Did it amount to less than \$50,000, more than \$50,000, or what?

- 1. LESS THAN \$50,000 [H200]
- 2. ABOUT \$50,000 [H200]
- 3. MORE THAN \$50,000 [H200]
- 2. DK [H200]
- 1. RF [H200]

H199D. Did it amount to less than \$2,000, more than \$2,000, or what?

- 1. LESS THAN \$2,000 [H200]
- 2. ABOUT \$2,000 [H200]
- 3. MORE THAN \$2,000 [H200]
- 2. DK [H200]
- 1. RF [H200]

H200. Did you {Text fill IF A52=1 OR 2: "or your" husband/wife/partner/spouse or partner} file a United States federal income tax return form for the year 2002?

- 1. YES [H201]
- 2. NO [I1]
- 2. DK [I1]
- 1. RF [I1]

H201. Did you {Text fill IF A52=1 OR 2: "and your" husband/wife/partner/spouse or partner} itemize deductions on your 2002 federal income tax, (such as property taxes, interest payments, medical expenses, and charitable contributions)?

- 1. YES [I1]
- 2. NO [I1]
- 3. [VOL] DID/WILL NOT FILE [I1]
- 2. DK [I1]
- 1. RF [I1]