The next few questions are about the different types of income people may receive. We don’t need to know the amount from each source.

Your responses can help us understand how people manage financially as they age.

Please feel free to refer to any records or other persons that may be of assistance in answering these questions.

Many of these questions ask about “last month.” By last month, I mean in \{CURRENT MONTH – 1\}.

PRESS 1 AND ENTER TO CONTINUE

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display you".

Otherwise, display "SP".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".

Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display “SELECT ALL THAT APPLY” and response option 2, “YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE”.

Display “in the last month” in underlined text.

QUESTION TEXT:

Did \{you/SP\} \{or \{SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME\}\} receive Social Security retirement and/or Railroad Retirement payments in the last month (that is in \{CURRENT MONTH – 1\})?

\{SELECT ALL THAT APPLY\}

CODES

<table>
<thead>
<tr>
<th>CODE</th>
<th>Code All That Apply</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES, SP RECEIVED PAYMENT FROM SOURCE</td>
</tr>
<tr>
<td>2</td>
<td>YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE</td>
</tr>
</tbody>
</table>
| 3    | NO PAYMENT RECEIVED FROM THIS SOURCE

REFUSED

DON'T KNOW
PROGRAMMER INSTRUCTIONS:

Allow code all that apply.
If 3 (NO PAYMENT) selected and [1 (SP PAYMENT) or 2 (SPOUSE PAYMENT)] is selected, display error message “INCONSISTENT ANSWER. ‘NO’ CANNOT BE SELECTED WITH ANY OTHER CATEGORY” when leaving the screen.

<table>
<thead>
<tr>
<th>IA4</th>
<th>ia3recssils1</th>
<th>R3 IA4 SP RECEIVD SSI LAST MONTH</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ia3recssils2</td>
<td>R3 IA4 SPOUSE PRT REC SSI LST MO</td>
</tr>
<tr>
<td></td>
<td>ia3recssils3</td>
<td>R3 IA4 NO SSI RECEIVD LAST MONTH</td>
</tr>
</tbody>
</table>

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or [SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME]".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display “SELECT ALL THAT APPLY” and response option 2, “YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE”.
Display “last month” in underlined text.

QUESTION TEXT:

Did [you/SP] [or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}] receive Supplemental Security Income, which is also called SSI, last month?

IF NEEDED: These are monthly government payments to lower-income people in need.

{SELECT ALL THAT APPLY}

CODES

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES, SP RECEIVED PAYMENT FROM SOURCE</td>
</tr>
<tr>
<td>2</td>
<td>YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE</td>
</tr>
<tr>
<td>3</td>
<td>NO PAYMENT RECEIVED FROM THIS SOURCE REFUSED DON'T KNOW</td>
</tr>
</tbody>
</table>

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.
If 3 (NO PAYMENT) selected and [1 (SP PAYMENT) or 2 (SPOUSE PAYMENT)] is selected, display error message “INCONSISTENT ANSWER. ‘NO’ CANNOT BE SELECTED WITH ANY OTHER CATEGORY” when leaving the screen.

<table>
<thead>
<tr>
<th>IA5</th>
<th>ia3rvpayls1</th>
<th>R3 IA5 SP REC PAY FRM VA LAST MO</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ia3rvpayls2</td>
<td>R3 IA5 SPOUS PA REC VA PAY LSTMO</td>
</tr>
<tr>
<td></td>
<td>ia3rvpayls3</td>
<td>R3 IA5 NO VA PAY REC LAST MONTH</td>
</tr>
</tbody>
</table>

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "you".
Otherwise, display "SP".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or [SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME]".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display “SELECT ALL THAT APPLY” and response option 2, “YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE”.

Display “last month” in underlined text.

QUESTION TEXT:
Did {you/SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} receive any payments from the Veteran’s Administration (U.S. Department of Veterans Affairs) last month related to military service or veteran survivor’s benefits?

{SELECT ALL THAT APPLY}

CODES     Code All That Apply
1          YES, SP RECEIVED PAYMENT FROM SOURCE
2          YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE
3          NO PAYMENT RECEIVED FROM THIS SOURCE
           REFUSED
           DON’T KNOW

PROGRAMMER INSTRUCTIONS:
Allow code all that apply.
If 3 (NO PAYMENT) selected and [1 (SP PAYMENT) or 2 (SPOUSE PAYMENT)]] is selected, display error message “INCONSISTENT ANSWER. ‘NO’ CANNOT BE SELECTED WITH ANY OTHER CATEGORY” when leaving the screen.

IA6PRE     IA6PRE    NOT ON FILE

People sometimes have other retirement income. This may be from pensions or retirement plans related to their jobs.

PRESS 1 AND ENTER TO CONTINUE

<table>
<thead>
<tr>
<th>IA6</th>
<th>ia3penjobou1</th>
<th>R3 IA6 SP HAS PENSION PLAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>ia3penjobou2</td>
<td>R3 IA6 SPOUSE HAS PENSION PLAN</td>
<td></td>
</tr>
<tr>
<td>ia3penjobou3</td>
<td>R3 IA6 NO PENSION PLAN</td>
<td></td>
</tr>
</tbody>
</table>

DISPLAY INSTRUCTIONS:
If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you". Otherwise, display "Does SP".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}"
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display “SELECT ALL THAT APPLY” and response option 2, “YES, SPOUSE/PARTNER HAS PENSION”.

QUESTION TEXT:
{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} have any pension plans that were a job-related or union benefit?
IF NEEDED: These plans often require that a person work for a certain number of years before they qualify or “are vested” in the pension plan.

{SELECT ALL THAT APPLY}

CODES Code All That Apply
1 YES, SP HAS PENSION
2 YES, SPOUSE/PARTNER HAS PENSION
3 NO PENSIONS
   REFUSED
   DON’T KNOW

PROGRAMMER INSTRUCTIONS:

Allow code all that apply.
If 3 (NO PENSIONS) selected and [1 (SP PENSION) or 2 (SPOUSE PENSION)] is selected, display error message “INCONSISTENT ANSWER. ‘NO’ CANNOT BE SELECTED WITH ANY OTHER CATEGORY” when leaving the screen.

IA7

ia3iraothac1 R3 IA7 SP HAS IRA OTHR RETIRE ACC
ia3iraothac2 R3 IA7 SPOUSE HAS IRA OTHR ACC
ia3iraothac3 R3 IA7 NO IRA OTHR RETIRE ACCT

DISPLAY INSTRUCTIONS:

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Does SP?". Otherwise, display "Do you".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME". Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display “SELECT ALL THAT APPLY” and response option 2, "YES, SPOUSE/PARTNER HAS 401K, 403B, IRA, OR KEOGH”.

QUESTION TEXT:

SHOW CARD IA1

Please look at the types of retirement plans on this card. {Do you/Does SP} {or [SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME]} have any of these retirement accounts?

IF NEEDED: 401Ks and 403Bs are plans where you contribute an amount each month from your paycheck, and your employer may match some of your contribution.

IF NEEDED: IRAs (Individual Retirement Accounts) and Keoghs are plans you set up on your own.

{SELECT ALL THAT APPLY}

CODES Code All That Apply
1 YES, SP HAS 401K, 403B, IRA, OR KEOGH
2 YES, SPOUSE/PARTNER HAS 401K, 403B, IRA, OR KEOGH
3 NO ACCOUNTS OF THIS TYPE
   REFUSED
   DON’T KNOW
PROGRAMMER INSTRUCTIONS:
Allow code all that apply.
If 3 (NO ACCT) selected and [1 (SP ACCT) or 2 (SPOUSE ACCT)] is selected, display error message “INCONSISTENT ANSWER. ‘NO’ CANNOT BE SELECTED WITH ANY OTHER CATEGORY” when leaving the screen.

<table>
<thead>
<tr>
<th>IA8</th>
<th>R3 IA8 SP OWNS MUTUAL FUND STOCK</th>
</tr>
</thead>
<tbody>
<tr>
<td>ia3mutfdstk1</td>
<td></td>
</tr>
<tr>
<td>ia3mutfdstk2</td>
<td>R3 IA8 SPOUSE OWNS FUNDS STOCK</td>
</tr>
<tr>
<td>ia3mutfdstk3</td>
<td>R3 IA8 SP SPOUSE OWN FUNDS STOCK</td>
</tr>
<tr>
<td>ia3mutfdstk4</td>
<td>R3 IA8 NO FUNDS OR STOCK OWNED</td>
</tr>
</tbody>
</table>

DISPLAY INSTRUCTIONS:
If IA7 = 1 (SP RETIREMENT ACCT) or 2 (SPOUSE RETIREMENT ACCT), display “Not including the retirement accounts we have already talked about, {do you/does SP}”. Otherwise, display “Do you/Does SP”.
If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you" or “do you”.
Otherwise, display "Does SP" or “does SP”.
If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".
Otherwise, display "SP FIRSTNAME LASTNAME".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".
If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display “SELECT ALL THAT APPLY” and response option 2, “YES, SPOUSE/PARTNER HAS ASSET” and 3, “YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY”.

QUESTION TEXT:
{Not including the retirement accounts we have already talked about, {do you/does SP}?{do you/Does SP}?} or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} own any mutual funds or stocks?
{SELECT ALL THAT APPLY}

CODES     Code All That Apply
1          YES, SP HAS ASSET
2          YES, SPOUSE/PARTNER HAS ASSET
3          YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY
4          NO ASSET OF THIS TYPE
           REFUSED
           DON’T KNOW

PROGRAMMER INSTRUCTIONS:
Allow code all that apply.
If 4 (NO ASSET) selected and [1 (SP ASSET), 2 (SPOUSE ASSET), or 3 (JOINT ASSET)] is selected, display error message “INCONSISTENT ANSWER. ‘NO’ CANNOT BE SELECTED WITH ANY OTHER CATEGORY” when leaving the screen.

<table>
<thead>
<tr>
<th>IA9</th>
<th>R3 IA9 SP OWNS BONDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>ia3ownbond1</td>
<td></td>
</tr>
<tr>
<td>ia3ownbond2</td>
<td>R3 IA9 SPOUSE OWNS BONDS</td>
</tr>
<tr>
<td>ia3ownbond3</td>
<td>R3 IA9 SP SPOUSE OWN BONDS</td>
</tr>
</tbody>
</table>
DISPLAY INSTRUCTIONS:
If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "do you".
Otherwise, display "does SP".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or [SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME]".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER HAS ASSET" and 3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY".

QUESTION TEXT:
Not including what we've already talked about, {do you/does SP} {or [SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME]} own any bonds, such as Government Savings Bonds, corporate, municipal, or other types of bonds?

{SELECT ALL THAT APPLY}

CODES

<table>
<thead>
<tr>
<th>Code</th>
<th>Code All That Apply</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES, SP HAS ASSET</td>
</tr>
<tr>
<td>2</td>
<td>YES, SPOUSE/PARTNER HAS ASSET</td>
</tr>
<tr>
<td>3</td>
<td>YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY</td>
</tr>
<tr>
<td>4</td>
<td>NO ASSET OF THIS TYPE</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
</tr>
</tbody>
</table>

PROGRAMMER INSTRUCTIONS:
Allow code all that apply.
If 4 (NO ASSET) selected and [1 (SP ASSET), 2 (SPOUSE ASSET), or 3 (JOINT ASSET)] is selected, display error message "INCONSISTENT ANSWER. ‘NO’ CANNOT BE SELECTED WITH ANY OTHER CATEGORY" when leaving the screen.

The next questions ask about different kinds of bank or savings accounts people sometimes have or property they own.
PRESS 1 AND ENTER TO CONTINUE
If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “do you”. Otherwise, display “does SP”.

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display “SELECT ALL THAT APPLY” and response option 2, “YES, SPOUSE/PARTNER HAS ASSET” and 3, “YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY”.

**QUESTION TEXT:**

Not counting what we’ve already talked about, {do you/does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} have any of the following types of accounts?

RESPONSE [1] a. A checking account?
RESPONSE [2] b. A savings account or money market account?
RESPONSE [3] c. Certificates of deposit?

{SELECT ALL THAT APPLY}

<table>
<thead>
<tr>
<th>CODES</th>
<th>Code All That Apply</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES, SP HAS ASSET</td>
</tr>
<tr>
<td>2</td>
<td>YES, SPOUSE/PARTNER HAS ASSET</td>
</tr>
<tr>
<td>3</td>
<td>YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY</td>
</tr>
<tr>
<td>4</td>
<td>NO ASSETS OF THIS TYPE</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
</tr>
</tbody>
</table>

**PROGRAMMER INSTRUCTIONS:**

Allow code all that apply.

If 4 (NO ASSETS) selected and [1 (SP ASSET), 2 (SPOUSE ASSET), or 3 (JOINT ASSET)] is selected, display error message “INCONSISTENT ANSWER. ‘NO’ CANNOT BE SELECTED WITH ANY OTHER CATEGORY” when leaving the screen.

<table>
<thead>
<tr>
<th>IA13</th>
<th>ia3realestt1</th>
<th>R3 IA13 SP OWNS REAL ESTATE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ia3realestt2</td>
<td>R3 IA13 SPOUSE OWNS REAL ESTATE</td>
</tr>
<tr>
<td></td>
<td>ia3realestt3</td>
<td>R3 IA13 SP SPOUSE OWN REAL ESTATE</td>
</tr>
<tr>
<td></td>
<td>ia3realestt4</td>
<td>R3 IA13 NO REAL ESTATE OWNED</td>
</tr>
</tbody>
</table>

**DISPLAY INSTRUCTIONS:**

If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “do you”. Otherwise, display “does SP”.

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display
"or [SP FIRSTNAME LASTNAME]/SPOUSE/PARTNER FIRSTNAME LASTNAME].
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display
"SELECT ALL THAT APPLY" and response option 2, "YES, SPOUSE/PARTNER HAS ASSET" and
3, "YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY".

If HP1 = 1 (OWNS HOME), display "besides [your/SP]'s home".

QUESTION TEXT:
{Do you/Does SP} {or [SP FIRSTNAME LASTNAME]/SPOUSE/PARTNER FIRSTNAME LASTNAME}) own
a business, a farm, or any other real estate {besides [SP’s] home}, including land or rental properties?

CODES Code All That Apply
1 YES, SP HAS ASSET
2 YES, SPOUSE/PARTNER HAS ASSET
3 YES, SP AND SPOUSE/PARTNER HAVE ASSET
4 jointley
3 NO ASSETS OF THIS TYPE
4 REFUSED
5 DON’T KNOW

PROGRAMMER INSTRUCTIONS:
Allow code all that apply.
If 4 (NO ASSETS) selected and [1 (SP ASSET), 2 (SPOUSE ASSET), or 3 (JOINT ASSET)] is selected, display error
message “INCONSISTENT ANSWER. ‘NO’ CANNOT BE SELECTED WITH ANY OTHER CATEGORY” when leaving
the screen.

IA50 ia3totincjt R3 IA50 JOINT TOTAL INCOME
ia3toincimjf R3 F IMPUTED JOINT TOTAL INC FLG
ia3toincimj1 R3 IA50 IMPUTED JOINT TOTAL INC1
ia3toincimj2 R3 IA50 IMPUTED JOINT TOTAL INC2
ia3toincimj3 R3 IA50 IMPUTED JOINT TOTAL INC3
ia3toincimj4 R3 IA50 IMPUTED JOINT TOTAL INC4
ia3toincimj5 R3 IA50 IMPUTED JOINT TOTAL INC5

DISPLAY INSTRUCTIONS:
If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “your”.
Otherwise, display “SP’s”.

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER),
display "and [SP FIRSTNAME LASTNAME]/SPOUSE/PARTNER FIRSTNAME LASTNAME)’s".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

If IA1 = 1 (SP SS/RR) or 2 (SPOUSE SS/RR), display “Social Security or Railroad Retirement”.
If IA4 = 1 (SP SSI) or 2 (SPOUSE SSI), display “Supplemental Security Income”.
If IA5 = 1 (SP VA) or 2 (SPouse VA), display “the Veteran’s Administration”.
If IA6 = 1 (SP PENSION) or 2 (SPOUSE PENSION), display “a pension plan”.
If IA7 = 1 (SP RETIREMENT ACCT) or 2 (SPOUSE RETIREMENT ACCT), display “any retirement accounts”.
If IA8 = 1 (SP MUTUAL FUNDS), 2 (SPOUSE MUTUAL FUNDS) or 3 (JOINT MUTUAL FUNDS), display “mutual
funds or stocks”.
If IA9 = 1 (SP BONDS), 2 (SPOUSE BONDS) or 3 (JOINT BONDS), display “bonds”.
If IA10a = 1 (SP CHECKING), 2 (SPOUSE CHECKING) or 3 (JOINT CHECKING) or IA10b = 1 (SP SAVINGS), 2
(SPOUSE SAVINGS) or 3 (JOINT SAVINGS), display “bank accounts”.
If IA10c = 1 (SP CDS), 2 (SPOUSE CDS) or 3 (JOINT CDS), display “CDs”.
If IA13 = 1 (SP REAL ESTATE), 2 (SPOUSE REAL ESTATE) or 3 (JOINT REAL ESTATE), display “business, farm, or
real estate”.
If LF1 = 1 (SP WORK LAST WEEK) or LF2 = 1 (SP HAD JOB LAST WEEK) or LF3 = 1 (SP WORK LAST MONTH) or
LF13 = 1 (SPOUSE WORK LAST MONTH), display “jobs”.
If more than one income source displayed, display “and” between each one.
Display “last year” in underlined text.

QUESTION TEXT:
Now I want to ask about {your/SP’s} {and SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME
LASTNAME’s} total income for last year, that is, for the calendar year ending in December {CURRENT YEAR -
1} before any federal or state taxes were taken out.

Now think about that total income from:
{Social Security or Railroad Retirement} {Supplemental Security Income}
{the Veteran’s Administration}
{a pension plan} {any retirement accounts}
{mutual funds or stocks} {bonds}
{bank accounts} {CDs} {business, farm or real estate}
{jobs} and from any other sources.
How much was {your/SP’s} {and SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME’s}
total income before taxes for last year (this is, for the 12 months ending in December {CURRENT YEAR - 1})?

IF NEEDED: We don’t need an exact dollar amount – the nearest $1,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to
understand how people manage financially as they age and what effect this might have on their health.

ENTER TOTAL INCOME FOR LAST YEAR [SECTION EW]

ENTER NUMBER

Range 1 to 99999999
REFUSED
DON’T KNOW

PROGRAMMER INSTRUCTIONS:
Range: $1-$999,999,999
Do not display the phrase 'Enter Number'.
If IA50 = 1-999,999,999, go to Section EW.

BOX IA51a

If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), go to IA51a.
Otherwise, go to IA51b.

IA51a

ia3toincesjt R3 IA51A JOINT EST TOT INCOME
ia3eincimjf R3 F IMPTD JOINT EST TOT INC FLG
DISPLAY INSTRUCTIONS:
If PROXY flag <> 1 (YES) or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display “your”. Otherwise, display “SP’s”.
If CURRENT INT SP MARITAL STATUS = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "and {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME". Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME". Display “last year” in underlined text.

QUESTION TEXT:

SHOW CARD IA2

Please look at this card and tell me which category is closest to {your/SP's} {and SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s} total income before taxes for last year (that is, for the 12 months ending in December {CURRENT YEAR - 1})?

CODES

<table>
<thead>
<tr>
<th>Code</th>
<th>Category</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>less than $27,600,</td>
<td>SECTION EW</td>
</tr>
<tr>
<td>2</td>
<td>$27,600-$41,999,</td>
<td>SECTION EW</td>
</tr>
<tr>
<td>3</td>
<td>$42,000-$63,999,</td>
<td>SECTION EW</td>
</tr>
<tr>
<td>4</td>
<td>$64,000-$107,999 or</td>
<td>SECTION EW</td>
</tr>
<tr>
<td>5</td>
<td>$108,000 or more?</td>
<td>SECTION EW</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
<td>SECTION EW</td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
<td>SECTION EW</td>
</tr>
</tbody>
</table>

IA51B

DISPLAY INSTRUCTIONS:
If PROXY flag <> 1 (YES), display “your”. Otherwise, display “SP’s”. Display “last year” in underlined text.

QUESTION TEXT:

SHOW CARD IA3

Please look at this card and tell me which category best fits {your/SP's} total income before taxes for last year
(that is, for the 12 months ending in December {CURRENT YEAR - 1})?

<table>
<thead>
<tr>
<th>CODES</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>less than $14,000,</td>
</tr>
<tr>
<td>2</td>
<td>$14,000-$21,999,</td>
</tr>
<tr>
<td>3</td>
<td>$22,000-$35,999,</td>
</tr>
<tr>
<td>4</td>
<td>$36,000-$48,999, or</td>
</tr>
<tr>
<td>5</td>
<td>$49,000 or more?</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
</tr>
</tbody>
</table>

PROGRAMMER INSTRUCTIONS:
Go to Section EW – Economic Well-being.