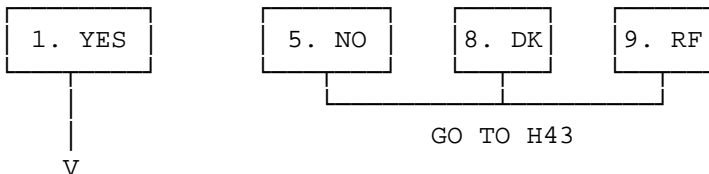


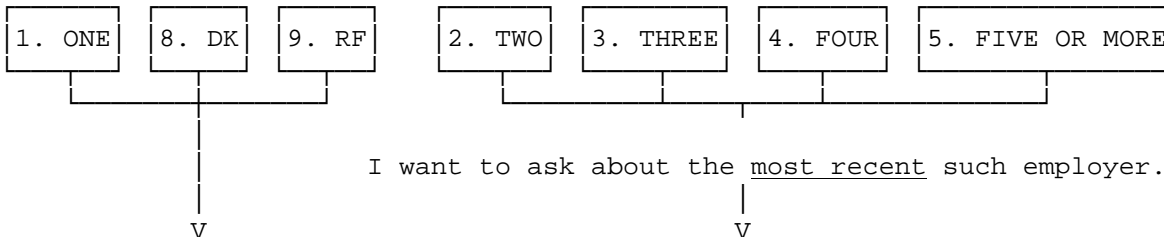
SECTION H: JOB HISTORY (July 25, 1995) – PAGE 1

PROXY (PRIMARY/SECONDARY)  1

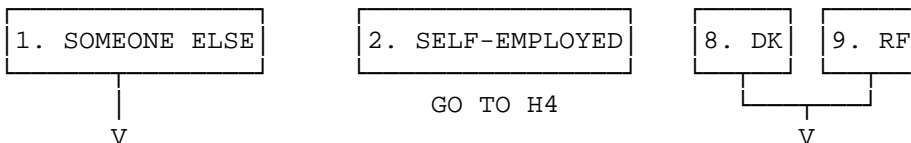
H1. Besides (your current job/the job you just told me about), have you worked for any other employer for at least 5 years or more, including self-employment?



H2. For how many such employers have you worked?



H3. (Were you working for someone else, were you self-employed, or what?)  
 [IF R SAYS "I RAN MY OWN BUSINESS", MARK SELF-EMPLOYED.]



H3a. For whom did you work? [What is the (company's/organization's) name?]

\_\_\_\_\_

H4. When did you start working for (that employer/yourself)?

\_\_\_\_\_ OR \_\_\_\_\_ YRS AGO OR AT AGE \_\_\_\_\_  
 YEAR

H5. What kind of business or industry did you work in -- that is, what did they make or do at the place where you worked?

BRANCHPOINT: IF R IS SELF-EMPLOYED (H3=2), GO TO H6.

H5a. What was the official title of your job? (The title that your employer used?)

\_\_\_\_\_

H6. What sort of work did you do? (Tell me a little more about what you did.)

\_\_\_\_\_

\_\_\_\_\_

SECTION H: JOB HISTORY (July 25, 1995) – PAGE 2

H7. When did you (leave that employer/stop working for yourself)?

\_\_\_\_\_ OR \_\_\_\_\_ YRS AGO OR AT AGE \_\_\_\_\_  
 YEAR

H8. During your last full year at that job, how many hours a week did you usually work?

\_\_\_\_\_ HOURS/WEEK

H9. [READ SLOWLY:] Counting paid vacations as weeks of work, how many weeks did you work that year?

\_\_\_\_\_ # WEEKS

H10. How much were you earning, before taxes and other deductions, that year? (Is that per hour, week, month, or year?)

\$ \_\_\_\_\_ PER \_\_\_\_\_  X96. NOTHING  X97. OTHER (SPECIFY)  X98. DK  X99. RF

H11. Why did you leave? (Did the business close, were you laid off or let go, did you find a better job, did you leave to take care of family members, or what?)  
 [DO NOT PROBE BUT CHECK ALL THAT APPLY.]

1. BUSINESS CLOSED	2. LAID OFF/ LET GO	3. POOR HEALTH/ DISABLED	4. FAMILY CARE
5. BETTER JOB	6. QUIT	7. RETIRED	97. OTHER (SPECIFY): _____

H12. Were you included in a pension or retirement plan, or in any tax-deferred savings plan, when you worked for (that employer/yourself)?

1. YES	5. NO	8. DK	9. RF
--------	-------	-------	-------

GO TO BRANCHPOINT BEFORE H23

V

H13. I would like to know what type of plan this was. In some retirement plans, Type A, benefits are usually based on a formula involving age, years of service, and salary. In other plans, Type B, money is accumulated in an account for you. Was your plan Type A or Type B?

1. TYPE A	2. TYPE B	3. BOTH TYPES	8. DK	9. RF
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GO TO H14

GO TO H18

GO TO H14

GO TO H21

V

H13a. How much money was in your account when you left that employer?

\$ \_\_\_\_\_  X96. NOTHING  X97. OTHER (SPECIFY)  X98. DK  X99. RF

SECTION H: JOB HISTORY (July 25, 1995) – PAGE 3

H14. Do you expect to receive benefits from this plan in the future, are you receiving benefits now, did you get a cash settlement when you left, did you lose your benefits, or what?

[DO NOT PROBE BUT CHECK ALL THAT APPLY AND ASK ALL APPROPRIATE FOLLOW-UP QUESTIONS. IF MORE THAN 1 BOX IS CHECKED, FOLLOW THE SKIPS FOR THE FIRST BOX MARKED.]

1. EXPECT FUTURE BENEFITS

→ NEXT PAGE, H15

2. RECEIVING BENEFITS NOW

H14a. In what month and year did you start to receive these benefits?

\_\_\_\_\_  
MONTH/YEAR

H14b. How much are the benefits per month or year?

\$ \_\_\_\_\_ PER \_\_\_\_\_

H14c. Are the benefits adjusted for changes in the cost of living?

1. YES    5. NO    8. DK    9. RF

GO TO H20

↓

H14d. Have they ever been adjusted for changes in the cost of living?

1. YES    5. NO    8. DK    9. RF

GO TO H20

3. RECEIVED CASH SETTLEMENT

H14e. How much did that amount to?

\$ \_\_\_\_\_

H14f. What did you do with the money?

1. BOUGHT DURABLES    2. SPENT IT    3. SAVED/ INVESTED

4. PAID OFF DEBT    5. ROLLED INTO IRA    7. OTHER (SPECIFY)

GO TO H20

4. ROLLED OVER INTO IRA

H14g. How much did that amount to?

\$ \_\_\_\_\_

GO TO H20

5. LOST BENEFITS

→ GO TO H20

7. OTHER (SPECIFY:)

\_\_\_\_\_  
\_\_\_\_\_

GO TO H20

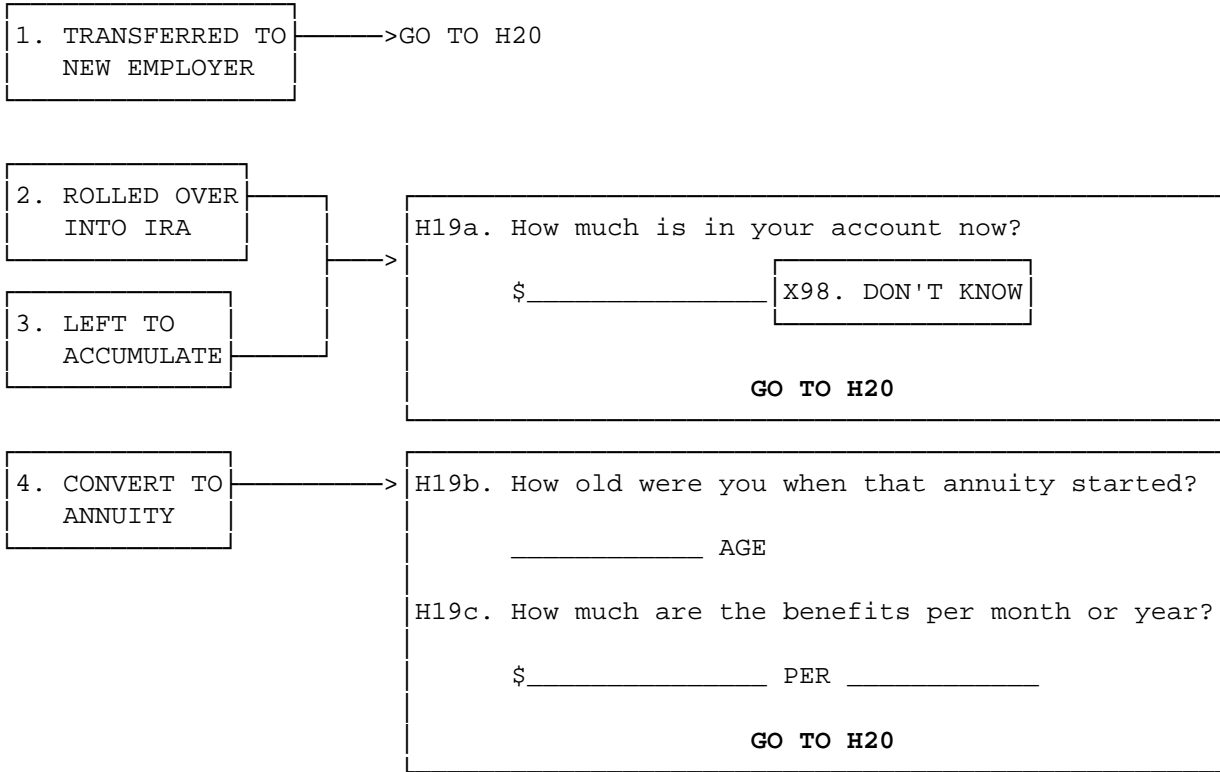


SECTION H: JOB HISTORY (July 25, 1995) – PAGE 5

H18. How much money was in your account when you left that employer?

\$ \_\_\_\_\_  X96. NOTHING  X97. OTHER (SPECIFY)  X98. DK  X99. RF

H19. When you left that employer, did you transfer your account to a new employer, roll it over into an IRA, leave it to accumulate in your old plan, convert it to an annuity, or what? [DO NOT PROBE BUT IF MORE THAN ONE RESPONSE GIVEN, CHECK BOX 7 AND RECORD ALL DETAILS.]



7. OTHER (SPECIFY)  8. DK  9. RF

v

H20. What is the earliest age at which you could have left that employer and begun to receive pension benefits?

\_\_\_\_\_ AGE  X98. DK  X99. RF

H21. We would like to obtain complete information about retirement benefits for people with work experience like yours. In order to do this, we need the complete address of your former employer. What is the address of the place where you worked? (I will need the mailing address, city, state, and zip code).

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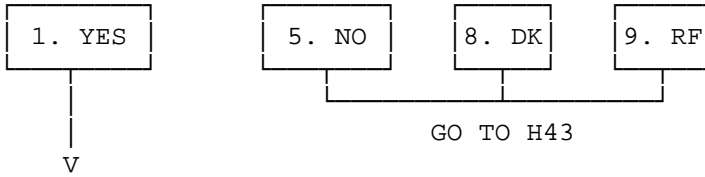


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SECTION H: JOB HISTORY (July 25, 1995) – PAGE 6

BRANCHPOINT: IF R HAS HAD ONLY ONE 5-YEAR-PLUS JOB (H2=1), GO TO H43.

H23. Besides the jobs you have already told me about, have you worked for any other employer where you were included in a pension or retirement plan, or in a tax-deferred savings plan of some sort?



H24. How many such employers have you worked for? (Besides the ones you have already told me about.)

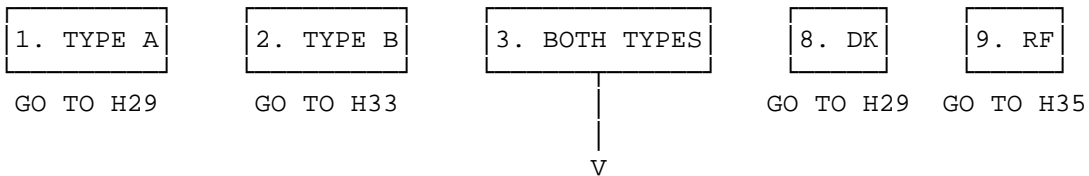
	# OF "OTHER" EMPLOYERS WHERE R WAS INCLUDED IN A PENSION OR RETIREMENT PLAN
↓ V	

	FIRST	NEXT
H25. When did you start working for (that/the first such/the next such) employer?	_____ YEAR	_____ YEAR
H26. And when did you leave?	_____ YEAR	_____ YEAR
H27. How much were you earning when you left?	\$ _____ PER _____  <div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 5px auto;">X96. NOTHING</div>  <div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 5px auto;">X97. OTHER (SPECIFY)</div>	\$ _____ PER _____  <div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 5px auto;">X96. NOTHING</div>  <div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 5px auto;">X97. OTHER (SPECIFY)</div>

↓  
V

RE-ASK H28-H34e

H28. I would like to know what type of pension or retirement plan you had. In some retirement plans, Type A, benefits are usually based on a formula involving age, years of service, and salary. In other plans, Type B, money is accumulated in an account for you. Was your plan Type A or Type B?



H28a. How much money was in your account when you left that employer?

\$ _____	X98. DON'T KNOW
----------	-----------------

SECTION H: JOB HISTORY (July 25, 1995) – PAGE 7

H29. Do you expect to receive benefits from this plan in the future, are you receiving benefits now, did you get a cash settlement when you left, did you lose your benefits, or what?

[DO NOT PROBE BUT CHECK ALL THAT APPLY AND ASK ALL APPROPRIATE FOLLOW-UP QUESTIONS. IF MORE THAN 1 BOX IS CHECKED, FOLLOW THE SKIPS FOR THE FIRST BOX MARKED.]

1. EXPECT FUTURE BENEFITS

→ NEXT PAGE, H30

2. RECEIVING BENEFITS NOW

H29a. In what month and year did you start to receive these benefits?

\_\_\_\_\_  
MONTH/YEAR

H29b. How much are the benefits per month or year?

\$ \_\_\_\_\_ PER \_\_\_\_\_

H29c. Are the benefits adjusted for changes in the cost of living?

1. YES

5. NO

8. DK

9. RF

GO TO H35

↓

H29d. Have they ever been adjusted for changes in the cost of living?

1. YES

5. NO

8. DK

9. RF

GO TO H35

3. RECEIVED CASH SETTLEMENT

H29e. How much did that amount to?

\$ \_\_\_\_\_

H29f. What did you do with the money?

1. BOUGHT DURABLES

2. SPENT IT

3. SAVED/ INVESTED

4. PAID OFF DEBT

5. ROLLED INTO IRA

7. OTHER (SPECIFY)

GO TO H35

4. ROLLED OVER INTO IRA

H29g. How much did that amount to?

\$ \_\_\_\_\_

GO TO H35

5. LOST BENEFITS

→ GO TO H35

7. OTHER (SPECIFY:)

\_\_\_\_\_  
\_\_\_\_\_

GO TO H35

SECTION H: JOB HISTORY (July 25, 1995) – PAGE 8

H30. How many years altogether were you included in this plan?  
 [INCLUDE YEARS WITH OTHER EMPLOYERS IF SAME PLAN.]

\_\_\_\_\_ # YEARS

H31. At what age do you expect to start receiving (the rest of your) benefits from this plan?

_____	AGE	96. ALREADY RECEIVING ALL BENEFITS	98. DON'T KNOW
		[MAKE SURE BENEFITS ARE RECORDED AT H29a-d;]	
V		<b>TURN TO P. 113, H35</b>	V

H32. About how much do you expect these benefits to be? (As a proportion of your pay when you left that job, or as an amount per month or year when you start receiving them?)

1. PERCENT OF PAY	2. AMOUNT PER MONTH/YEAR	3. LUMP SUM	8. DK	9. RF
	GO TO H32b	GO TO H32d	GO TO H35	
V				

H32a. ENTER THE PERCENT OF FINAL PAY AT RETIREMENT.

\_\_\_\_\_ % — GO TO H35

H32b/c. PROBE IF NECESSARY: How much do you expect to receive? Was that per month or year?

\$ _____ PER _____	X96. NONE	X97. OTHER (SPECIFY)	X98. DK	X99. RF
GO TO H35				

H32d. ENTER LUMP SUM AMOUNT.

\$ _____	X96. NONE	X97. OTHER (SPECIFY)	X98. DK	X99. RF
GO TO H35				



SECTION H: JOB HISTORY (July 25, 1995) – PAGE 9

H33. How much money was in your account when you left that employer?

\$ \_\_\_\_\_

DON'T KNOW

H34. When you left that employer, did you transfer your account to a new employer, roll it over into an IRA, leave it to accumulate in your old plan, convert it to an annuity, or what? [DO NOT PROBE BUT IF MORE THAN ONE RESPONSE GIVEN, CHECK BOX 7 AND RECORD ALL DETAILS.]

1. TRANSFERRED TO NEW EMPLOYER → GO TO H35

2. ROLLED OVER INTO IRA

3. LEFT TO ACCUMULATE

H34a. How much is in your account now?

\$ \_\_\_\_\_

X98. DON'T KNOW

GO TO H35

4. CONVERT TO ANNUITY

H34b. How old were you when that annuity started?

\_\_\_\_\_ AGE

H34c. How much are the benefits per month or year?

\$ \_\_\_\_\_ PER \_\_\_\_\_

GO TO H35

7. OTHER (SPECIFY) \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

H35. BRANCHPOINT: IF THERE WAS ONLY ONE "OTHER" EMPLOYER (H24=1), GO TO H43.

OTHERWISE, GO BACK TO H25, "NEXT EMPLOYER".

SECTION H: JOB HISTORY (July 25, 1995) – PAGE 10

H43. Employers sometimes encourage older workers to leave a firm at a particular time by offering a special financial incentive, like a cash bonus or improved pension benefits. These are often called "early retirement windows." Have you ever been offered such an early retirement window on any job?

1. YES	5. NO	8. DK	9. RF
↓	└───┬───┬───┬───┘ GO TO H53		
V			

H44. How many times has this happened?

	# OF TIMES
--	------------

<i>[QUESTIONS REPEATED IF MORE THAN ONE EARLY-OUT WINDOW OFFERED]</i>	
H45a/b. When was the [READ IF MORE THAN ONE OFFER: (first/last)] special incentive offered?	a: MONTH b: YEAR
H46. Which employer were you working for at that time?	FULL EMPLOYER NAME [CATI DISPLAYS NAMES OF WAVE I & II EMPLOYERS]
H47. Was the special incentive a cash bonus, improved pension benefits, or what? [ENTER ALL THAT APPLY.]	1. CASH BONUS 2. IMPROVED BENEFITS 3. PERMANENT MEDICAL INSURANCE 4. TEMPORARY MEDICAL INSURANCE 5. TEMPORARY CASH BENEFIT 6. ADDITIONAL YEARS OF SERVICE CREDITED 7. OTHER (SPECIFY)
<i>[H48a-H48f BROUGHT UP AS NECESSARY BY CATI APPLICATION]</i>	
H48. How much did the cash bonus amount to?	AMOUNT
H48. How much did the extra pension benefits amount to?	AMOUNT PER TIME PERIOD
H48a. Until what age did you receive the temporary medical insurance	AGE OR (IF GIVEN) YEAR
H48b. How much did the temporary cash benefits amount to?	AMOUNT PER TIME PERIOD
H48c/d. Until what age did you receive the temporary cash benefit?	a: AGE OR (IF GIVEN) b: YEAR
H48e. How many years of service credit did you receive?	# OF YEARS
H48f. How much did the others amount to?	AMOUNT

SECTION H: JOB HISTORY (July 25, 1995) – PAGE 11

<p>H49. Did you accept the incentive and leave that employer?</p>	<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="border: 1px solid black; padding: 2px 10px;">1. YES</div> <div style="border: 1px solid black; padding: 2px 10px;">5. NO</div> <div style="border: 1px solid black; padding: 2px 10px;">8. DK</div> <div style="border: 1px solid black; padding: 2px 10px;">9. RF</div> </div> <div style="text-align: center; margin-top: 5px;">             V              GO TO H51         </div>
<p>H50. Was the special incentive important in your decision, or would you probably have left at about that time anyway?</p>	<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="border: 1px solid black; padding: 2px 10px;">1. IMPORTANT</div> <div style="border: 1px solid black; padding: 2px 10px;">5. LEFT ANYWAY</div> </div> <div style="text-align: center; margin-top: 5px;">             GO TO BRANCHPOINT BELOW         </div>
<p>H51. If you had been offered twice as much (to leave) at that time, would you have done so?</p>	<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="border: 1px solid black; padding: 2px 10px;">1. YES</div> <div style="border: 1px solid black; padding: 2px 10px;">5. NO</div> </div> <div style="text-align: center; margin-top: 5px;">             V         </div>
<p>BRANCHPOINT: SEE H44</p> <p>IF THERE WAS ONLY ONE EARLY-OUT WINDOW, GO TO H53.</p> <p>OTHERWISE, GO BACK TO H45 AND REPEAT QUESTION SEQUENCE FOR LAST EARLY-OUT WINDOW.</p>	

SECTION H: JOB HISTORY (July 25, 1995) – PAGE 12

H53. Individuals are sometimes exposed to dangerous chemicals or other hazards at work. Have you ever had to breathe any kinds of dusts, fumes, or vapors, or been exposed to organic solvents or pesticides at work?

1. YES	5. NO	8. DK	9. RF
--------	-------	-------	-------

GO TO BRANCHPOINT BEFORE H59

V

H54. Have you been exposed to these hazards for more than one year?

1. YES	5. NO	8. DK	9. RF
--------	-------	-------	-------

GO TO BRANCHPOINT BEFORE H59

V

H54a. What kinds were they?

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H55. In general, has your exposure to these things been occasional, or has it been a regular part of your job?

1. REGULAR	2. OCCASIONAL	8. DK	9. RF
------------	---------------	-------	-------

GO TO BRANCHPOINT BEFORE H59

V

H56. How old were you when you were first exposed to these things?

\_\_\_\_\_ AGE

H57. And how old were you when you were last exposed?

\_\_\_\_\_ AGE

95. CURRENT AGE; STILL EXPOSED

H58. For about how many years have you been exposed to these dusts, fumes, vapors, organic solvents, or pesticides during your entire working life?

\_\_\_\_\_ # OF YEARS

98. DON'T KNOW

BRANCHPOINT: IF THIS IS A PROXY INTERVIEW, GO TO H61.

H59. Do you think that you have been harmed by chemicals or physical hazards in any jobs that you have held?

1. YES	5. NO	8. DK	9. RF
↓ V	GO TO H60		

H59a. Do you believe that the harm is permanent?

1. YES	5. NO	8. DK	9. RF
--------	-------	-------	-------

H60. Have you ever changed jobs or refused a regular job that was otherwise good because you were concerned that it might harm your health or be unsafe?

1. YES	5. NO	8. DK	9. RF
--------	-------	-------	-------

H61. (Remind me again...) Have you ever been employed by a unit of a state, county, or local government?

1. YES	5. NO	8. DK	9. RF
↓ V	GO TO H62		

	FIRST EMPLOYMENT PERIOD	NEXT EMPLOYMENT PERIOD
H61a. During what years were you employed by state or local governments?	FROM _____ TO _____ YEAR YEAR	FROM _____ TO _____ YEAR YEAR <div style="border: 1px solid black; padding: 2px; margin-top: 5px;">X96. NO 2ND EMPL PERIOD</div>

H62. Aside from military service, (remind me again,) have you ever been employed by the federal government?

1. YES	5. NO	8. DK	9. RF
↓ V	GO TO END OF SECTION		

	FIRST EMPLOYMENT PERIOD	NEXT EMPLOYMENT PERIOD
H62a. During what years were you employed by the federal government?	FROM _____ TO _____ YEAR YEAR	FROM _____ TO _____ YEAR YEAR <div style="border: 1px solid black; padding: 2px; margin-top: 5px;">X96. NO 2ND EMPL PERIOD</div>