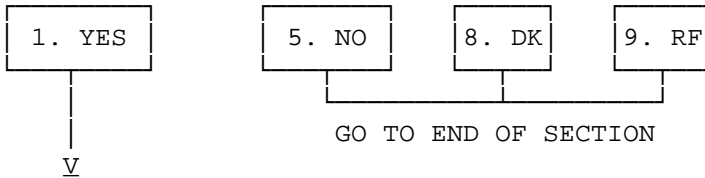


PROXY (PRIMARY/SECONDARY)

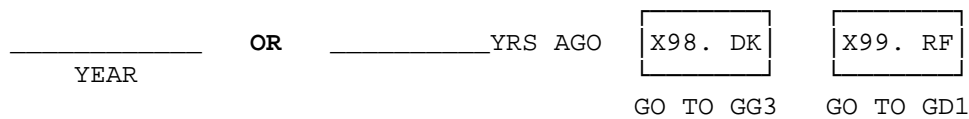
BRANCHPOINT: IF R IS NOT A NEW SPOUSE (Q186¹1), GO TO END OF SECTION

GG1. Have you ever worked for pay for more than a few months?



GG1a. In what year did you last work for pay?

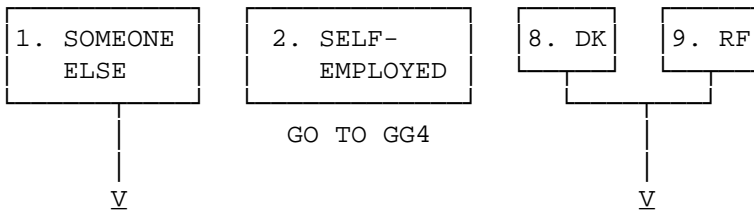
[IF LAST WORKED IN 1992 OR 1993, ASK: In what month was that?]



BRANCHPOINT: IF R LAST WORKED BEFORE 1976 (MORE THAN 20 YEARS AGO), GO TO NEXT SECTION, GH52a.

GG3. The next questions are about the last job you had. We're interested in your situation near the end of this job. Did you work for someone else, were you self-employed, or what?

[IWER: IF R SAYS, "I RAN MY OWN BUSINESS" CHECK "SELF-EMPLOYED".]



GG3a. For whom did you work? [What is the (company's/organization's) name?]

GG4. 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 GG3=2 (SELF-EMPLOYED) --> GO TO GG6

GG5. What was the official title of your job? (The title that your employer used?)

OFFICIAL JOB TITLE

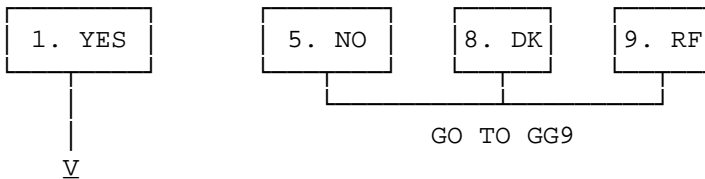
GG6. What sort of work did you do? (Tell me a little more about what you did.)

GG7. How many hours a week did you usually work for this employer?

_____ # HOURS

BRANCHPOINT: IF GG3=2 (SELF-EMPLOYED) --> GO TO GG9

GG8. Not counting any overtime hours, could you have reduced the number of hours in your regular work schedule?



GG8a. Could you have reduced your work hours by quite a lot, say to half what you usually worked, without affecting either your hourly pay rate or your fringe benefits?

1. YES	5. NO	8. DK	9. RF
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GG9. [READ SLOWLY:] Counting paid vacations as weeks of work, how many weeks a year did you usually work?

_____ # WEEKS

GG10. What were you earning, before deductions, when you left that employer? (Was that per hour, week, month, or year?)

\$ _____ PER _____

BRANCHPOINT: IF GG3=2 (SELF-EMPLOYED) --> GO TO GG12

GG11. About how many employees worked for that company or organization at the location where you worked?

_____ # OF EMPLOYEES X98. DK X99. RF
 GO TO GG12

GG11a. Was it fewer than 5, 5 to 14, 15 to 24, 25 to 99, 100 to 499, or 500 or more?

- | | | | | | |
|-----------------|------------|-------------|-------------|---------------|----------------|
| 1. FEWER THAN 5 | 2. 5 TO 14 | 3. 15 TO 24 | 4. 25 TO 99 | 5. 100 TO 499 | 6. 500 OR MORE |
|-----------------|------------|-------------|-------------|---------------|----------------|

GG12. About how many employees worked for that company or organization at all locations?

995. ONLY ONE LOCATION (VOL)	_____ # OF EMPLOYEES GO TO GG13	<input type="checkbox"/> 998. DK	<input type="checkbox"/> 999. RF
GO TO GG13		 V	

GG12a. Was it fewer than 5, 5 to 14, 15 to 24, 25 to 99, 100 to 499, or 500 or more?

- | | | | | | |
|-----------------|------------|-------------|-------------|---------------|----------------|
| 1. FEWER THAN 5 | 2. 5 TO 14 | 3. 15 TO 24 | 4. 25 TO 99 | 5. 100 TO 499 | 6. 500 OR MORE |
|-----------------|------------|-------------|-------------|---------------|----------------|

GG13. When did you start working for that employer?

_____ OR _____ YRS AGO OR AT AGE _____
 YEAR

GG14. What were you earning, before taxes or other deductions, when you started? (Was that per hour, week, month, or year?)

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

GG15. Were you covered on that job by a union or employee-association contract?

- | | |
|---------------------------------|--------------------------------|
| <input type="checkbox"/> 1. YES | <input type="checkbox"/> 5. NO |
|---------------------------------|--------------------------------|

GG16. Why did you leave that employer? (Did the business close, were you laid off or let go, did you leave to take care of family members, or what?)
 [DO NOT PROBE BUT CHECK ALL THAT APPLY.]

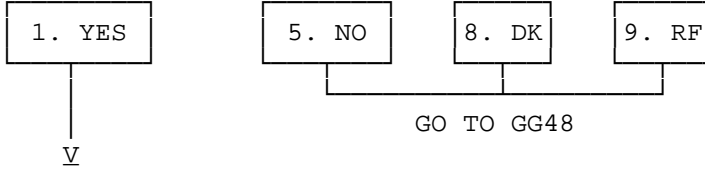
- | | | | |
|--------------------|---------------------|--------------------------|-------------------------------|
| 1. BUSINESS CLOSED | 2. LAID OFF/ LET GO | 3. POOR HEALTH/ DISABLED | 4. FAMILY CARE |
| 5. BETTER JOB | 6. QUIT | 7. RETIRED | 97. OTHER (SPECIFY):
_____ |

GG17. [IF NOT SELF-EMPLOYED AT PREVIOUS IW:]

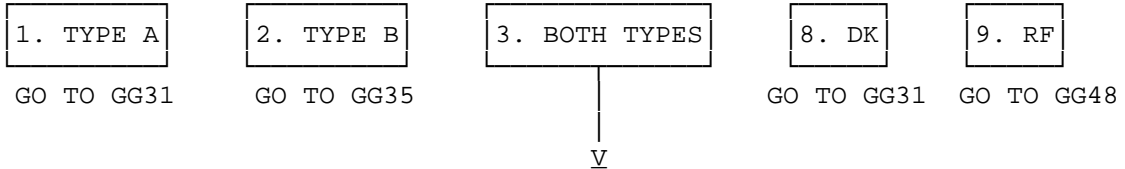
Were you included in a pension or retirement plan, or in any tax-deferred savings plan, when you worked for that employer?

[IF SELF-EMPLOYED AT PREVIOUS IW:]

Aside from IRAs or Keogh plans, were you included in a pension or retirement plan, or in any tax-deferred savings plan, through your work?



GG30. 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?



GG30a. For the part of your pension where money is accumulated in an account, how much money was in your account when you left that employer?

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

GG30b. When you left that (IF SELF-EMPLOYED AT PREVIOUS IW: business/ALL OTHERS: employer), did you withdraw the money, 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. WITHDREW THE MONEY	→ ≥GO TO GG31
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2. ROLLED OVER INTO IRA	→ ≥	GG30c. How much is in your account now? \$ _____ <input type="checkbox"/> 0. NONE <input type="checkbox"/> X97. OTHER (SPEC)
3. LEFT TO ACCUMULATE		
		GO TO GG31

4. CONVERT TO ANNUITY	→ ≥	GG30d. How old were you when that annuity started? NOTE: IF R INDICATES THAT BENEFITS HAVE NOT YET STARTED, RECORD WHAT BENEFITS WILL BE. _____ AGE
		GG30e/f. How much are the benefits per month or year? NOTE: IF BENEFITS HAVE NOT YET STARTED, RECORD WHAT BENEFITS WILL BE. e: AMOUNT PER f: TIME PERIOD <input type="checkbox"/> 0. NONE <input type="checkbox"/> X97. OTHER (SPECIFY)
		GO TO GG31

7. OTHER [PLEASE DESCRIBE FULLY:] _____ _____ _____ _____
--

8. DK	9. RF
GO TO GG31	

GG31. (IF GG30=3: Now, about the part of your pension where benefits are based on a formula:) 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 —> GO TO GG32

2. RECEIVING BENEFITS NOW —>

GG31a. In what month and year did you start to receive these benefits?

MONTH/YEAR

GG31b. How much are the benefits per month or year?

\$_____ PER _____

GG31c. Are the benefits adjusted for changes in the cost of living?

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

GO TO GG37

V

GG31d. Have they ever been adjusted for changes in the cost of living?

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

GO TO GG37

3. RECEIVED CASH SETTLEMENT —>

GG31e. How much did that amount to?

\$_____

GG31f. 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 GG37

4. ROLLED OVER INTO IRA —>

GG31g. How much did that amount to?

\$_____

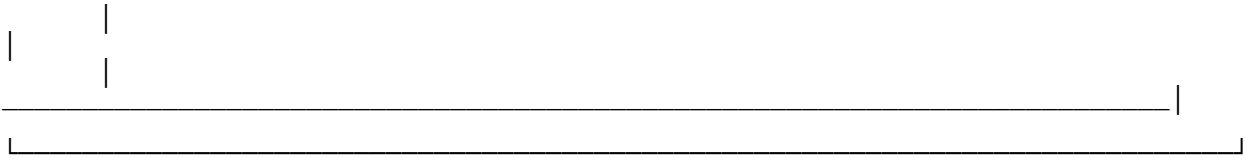
GO TO GG37

5. LOST BENEFITS —> GO TO GG37

7. OTHER (SPECIFY:)

|

|



GO TO GG37

GG32. How many years altogether were you included in this plan?
[INCLUDE YEARS WITH OTHER EMPLOYERS IF SAME PLAN.]

_____ # YEARS

GG33. At what age do you expect to start receiving (the rest of your) benefits from this plan?

_____ AGE

96. ALREADY RECEIVING ALL BENEFITS	98. DK	99. RF
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[MAKE SURE BENEFITS ARE RECORDED AT GG31a - GG31d;]
NEXT PAGE, GG37

V

GG34. 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
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V

GO TO GG34b GO TO GG37

GG34a. ENTER THE PERCENT OF FINAL PAY.

_____ % —> GO TO GG37

GG34b/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
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GO TO GG37

GG34d. ENTER LUMP SUM AMOUNT.

\$ _____	X96. NONE	X97. OTHER (SPECIFY)	X98. DK	X99. RF
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GO TO GG37

GG35. How much money was in your account when you left that employer?

\$ _____

X96. NOTHING

X97. OTHER (SPECIFY)

X98. DK

X99. RF

GG36. When you left that employer, did you withdraw the money, 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. WITHDREW THE MONEY

GO TO GG37

2. ROLLED OVER

INTO IRA

GG36a. How much is in your account now?

GO TO

\$ _____

DON'T KNOW

3. LEFT TO

ACCUMULATE

GO TO GG37

4. CONVERT TO

GG36b. How old were you when that annuity started?

ANNUITY

NOTE: IF R INDICATES THAT BENEFITS HAVE NOT YET STARTED, RECORD WHAT BENEFITS WILL BE.

_____ AGE

GG36c. How much are the benefits per month or year? NOTE: IF BENEFITS HAVE NOT YET STARTED, RECORD WHAT BENEFITS WILL BE.

\$ _____ PER _____

GO TO GG37

7. OTHER (SPECIFY)

GG37. What is the earliest age at which you could have left that employer and begun to receive pension benefits?

_____ AGE

98. DON'T KNOW

GG48. Over the last 10 years, since 1984, have you ever been on temporary layoff, or unemployed and looking for work? [INCLUDE CURRENT PERIOD IF R IS NOW LOOKING FOR WORK.]

1. YES

5. NO

8. DK

9. RF

GO TO NEXT SECTION

V

GG48a. How many times have you been on temporary layoff or unemployed and looking for work?

_____ # TIMES

END OF SECTION GG