

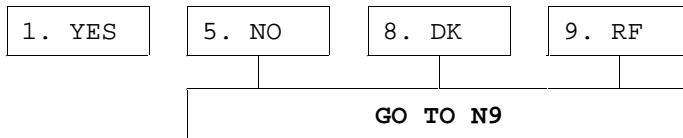
NOTE: WHERE THERE IS MORE THAN ONE JUMP WITHIN A BRANCHPOINT BOX, THE JUMPS ARE TO BE APPLIED IN ORDER FROM THE TOP.

N1 BRANCHPOINT: IF NEW INTERVIEW HH *or* NOT FINANCIAL R, GO TO N50 BRANCHPOINT

IF HH DID NOT HAVE OTHER RESIDENCE AT R's LAST IW *or* R DID NOT OWN HOME AT R's LAST IW *or* R DOES NOT OWN HOME (F3 NOT 1)} *or* R DOES NOT OWN FARM (F4 NOT 1) *or* R DOES NOT OWN MOBILE HOME AND SITE (F5 NOT 1) *or* R DOES NOT OWN SECOND HOME OR CONDO (F40 NOT 1), GO TO N11

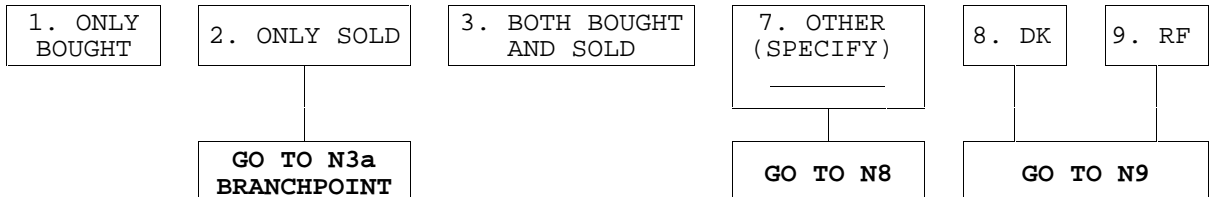
N1. Now I'd like to ask you some questions about the changes in your (family's) finances since we last talked to you.

[Since *FINANCIAL R's LAST IW MONTH, YEAR*/In the last two years], have you (or your [husband/wife/partner]) bought or sold a home that was your primary residence or second home?



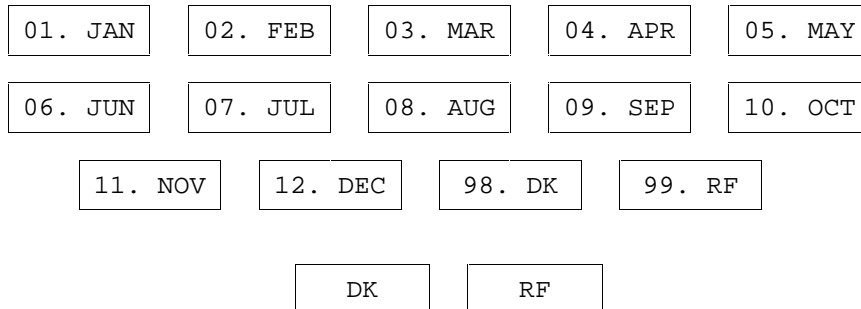
N1a. Did you only buy, only sell, both buy and sell, or what?

[IWER: IF R REPORTS MULTIPLE SALES OR PURCHASES, SELECT "OTHER (SPECIFY)"]



N1b. In what month and year did you buy a home?

N1b. MONTH:



N1c. YEAR

N2. What was the purchase price?

[IWER: DO NOT PROBE DK]

DK	RF
----	----

AMOUNT

|

**GO TO N3a
BRANCHPOINT**

<p>N2a. Did it amount to less than \$50,000, more than \$50,000, or what?</p>	<p>1. LESS THAN \$50,000</p>	<p>3. ABOUT \$50,000</p>	<p>5. MORE THAN \$50,000</p>	<p>8. DK</p>	<p>9. RF</p>
	GO TO N2c	GO TO N3a BRANCHPOINT		GO TO N3a BRANCHPOINT	

<p>N2b. (Did it amount to) less than \$200,000, more than \$200,000, or what?</p>	<p>1. LESS THAN \$200,000</p>	<p>3. ABOUT \$200,000</p>	<p>5. MORE THAN \$200,000</p>	<p>8. DK</p>	<p>9. RF</p>
	GO TO N3a BRANCHPOINT				

<p>N2c. (Did it amount to) less than \$15,000, more than \$15,000, or what?</p>	<p>1. LESS THAN \$15,000</p>	<p>3. ABOUT \$15,000</p>	<p>5. MORE THAN \$15,000</p>	<p>8. DK</p>	<p>9. RF</p>
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N3a BRANCHPOINT: IF R BOUGHT BUT DID NOT SELL A HOME (N1a=1), GO TO N9

N3a. In what month and year did you sell a home?

N3a. MONTH:

01. JAN	02. FEB	03. MAR	04. APR	05. MAY
06. JUN	07. JUL	08. AUG	09. SEP	10. OCT
11. NOV	12. DEC	98. DK	99. RF	

DK	RF
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N3b. YEAR

N4. What was the selling price?

[IWER: DO NOT PROBE DK]

_____ AMOUNT <div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 0 auto;"> GO TO N5a </div>	DK	RF
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N4a. Did it amount to less than \$50,000, more than \$50,000, or what?	1. LESS THAN \$50,000 GO TO N4c	3. ABOUT \$50,000 GO TO N5a	5. MORE THAN \$50,000	8. DK GO TO N5a	9. RF GO TO N5a
N4b. (Did it amount to) less than \$200,000, more than \$200,000, or what?	1. LESS THAN \$200,000 GO TO N5a	3. ABOUT \$200,000 GO TO N5a	5. MORE THAN \$200,000 GO TO N5a	8. DK GO TO N5a	9. RF GO TO N5a
N4c. (Did it amount to) less than \$15,000, more than \$15,000, or what?	1. LESS THAN \$15,000	3. ABOUT \$15,000	5. MORE THAN \$15,000	8. DK	9. RF

N5a. In what month and year did you buy that home?

[IWER: THIS REFERS TO THE HOME THAT THEY SOLD]

N5a. MONTH:

01. JAN	02. FEB	03. MAR	04. APR	05. MAY
06. JUN	07. JUL	08. AUG	09. SEP	10. OCT
11. NOV	12. DEC	98. DK	99. RF	

	DK	RF
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N5b. YEAR

N6. What was the purchase price?

[IWER: THIS REFERS TO THE HOME THAT THEY SOLD]

[IWER: DO NOT PROBE DK]

	DK	RF
AMOUNT		
GO TO N9		

N6a. Did it amount to less than \$50,000, more than \$50,000, or what?	1. LESS THAN \$50,000	3. ABOUT \$50,000	5. MORE THAN \$50,000	8. DK	9. RF
	GO TO N6c	GO TO N9		GO TO N9	
N6b. (Did it amount to) less than \$200,000, more than \$200,000, or what?	1. LESS THAN \$200,000	3. ABOUT \$200,000	5. MORE THAN \$200,000	8. DK	9. RF
	GO TO N9				
N6c. (Did it amount to) less than \$15,000, more than \$15,000, or what?	1. LESS THAN \$15,000	3. ABOUT \$15,000	5. MORE THAN \$15,000	8. DK	9. RF
	GO TO N9				

N8. Please describe [each of those transactions/that transaction].

[IWER: PROBE FOR MONTH AND YEAR OF EACH SALE OR PURCHASE
[Since *FINANCIAL R's LAST IW MONTH, YEAR*/In the last two years] AND THE
PURCHASE OR SELLING PRICE OF EACH HOME]

N9. [Since *FINANCIAL R's LAST IW MONTH, YEAR*/In the last two years], did you (or your [husband/wife/partner]) make any major additions or home improvements to a primary residence (or second home) that you owned?

[IWER: DO NOT COUNT GENERAL MAINTENANCE OR UPKEEP]

1. YES	5. NO	8. DK	9. RF
GO TO N11 BRANCHPOINT			

N10. What was the dollar cost of these additions and improvements, plus the value of any work you may have done yourself?

[IWER: DO NOT PROBE DK]

AMOUNT

DK	RF
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**GO TO N11
BRANCHPOINT**

<p>N10a. Did it amount to less than \$10,000, more than \$10,000, or what?</p>	<p>1. LESS THAN \$10,000</p>	<p>3. ABOUT \$10,000</p>	<p>5. MORE THAN \$10,000</p>	<p>8. DK</p>	<p>9. RF</p>
	<div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 0 auto;"> <p>GO TO N10c</p> </div>	<div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 0 auto;"> <p>GO TO N11 BRANCHPOINT</p> </div>		<div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 0 auto;"> <p>GO TO N11 BRANCHPOINT</p> </div>	
<p>N10b. (Did it amount to) less than \$50,000, more than \$50,000, or what?</p>	<p>1. LESS THAN \$50,000</p>	<p>3. ABOUT \$50,000</p>	<p>5. MORE THAN \$50,000</p>	<p>8. DK</p>	<p>9. RF</p>
	<div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 0 auto;"> <p>GO TO N11 BRANCHPOINT</p> </div>				
<p>N10c. (Did it amount to) less than \$2,000, more than \$2,000, or what?</p>	<p>1. LESS THAN \$2,000</p>	<p>3. ABOUT \$2,000</p>	<p>5. MORE THAN \$2,000</p>	<p>8. DK</p>	<p>9. RF</p>

N11 BRANCHPOINT: IF R DID NOT REPORT OWNING ANY REAL ESTATE OTHER THAN {MAIN OR SECOND} HOME {IN R's LAST IW and {IN THIS IW (J76 NOT {1 OR 2})}}, GO TO N19 BRANCHPOINT

N11. [Since *FINANCIAL R's LAST IW MONTH, YEAR*/In the last two years], have you (or your [husband/wife/partner]) sold any real estate other than your principle residence or second home, such as land, or rental or investment property?

1. YES	5. NO	8. DK	9. RF
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GO TO N13

N11a. Have you bought any such real estate properties [since *FINANCIAL R's LAST IW MONTH, YEAR*/in the last two years]?

1. YES	5. NO	8. DK	9. RF
GO TO N17			

N12. About how much in total did you pay for this real estate?

[IWER: DO NOT PROBE DK]

AMOUNT	DK	RF
GO TO N17		

N12a. Did it amount to less than \$200,000, more than \$200,000, or what?	1. LESS THAN \$200,000	3. ABOUT \$200,000	5. MORE THAN \$200,000	8. DK	9. RF
	GO TO N12c	GO TO N17	GO TO N17		

N12b. (Did it amount to) less than \$500,000, more than \$500,000, or what?	1. LESS THAN \$500,000	3. ABOUT \$500,000	5. MORE THAN \$500,000	8. DK	9. RF
	GO TO N17				

N12c. (Did it amount to) less than \$50,000, more than \$50,000, or what?	5. MORE THAN \$50,000	3. ABOUT \$50,000	1. LESS THAN \$50,000	8. DK	9. RF
	GO TO N17				

N13. Did you also buy any real estate of this sort [since *FINANCIAL R's LAST IW MONTH, YEAR*/in the last two years]?

1. YES	5. NO	8. DK	9. RF
GO TO N15			

N14. About how much in total was the dollar value of the real estate you sold [since *FINANCIAL R's LAST IW MONTH, YEAR*/in the last two years]?

[IWER: DO NOT PROBE DK]

	DK	RF				
AMOUNT						
GO TO N17						
N14a. Did it amount to less than \$200,000, more than \$200,000, or what?	1. LESS THAN \$200,000	3. ABOUT \$200,000	5. MORE THAN \$200,000	8. DK	9. RF	
	GO TO N14c	GO TO N15		GO TO N15		
	GO TO N17					
N14b. (Did it amount to) less than \$500,000, more than \$500,000, or what?	1. LESS THAN \$500,000	3. ABOUT \$500,000	5. MORE THAN \$500,000	8. DK	9. RF	
	GO TO N17					
N14c. (Did it amount to) less than \$50,000, more than \$50,000, or what?	1. LESS THAN \$50,000	3. ABOUT \$50,000	5. MORE THAN \$50,000	8. DK	9. RF	
	GO TO N17					

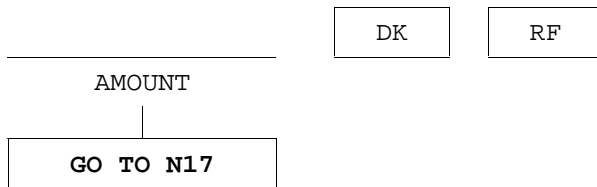
N15. Overall, was the dollar cost of the real estate you bought greater than the dollar value of what you sold (minus commissions), less than the value of what you sold, about equal, or what?

[IWER: PROBE IF DK]

1. BOUGHT MORE THAN SOLD	2. BOUGHT LESS THAN SOLD	3. BOUGHT AND SOLD ABOUT EQUAL AMOUNTS	8. DK	9. RF
GO TO N17				

N16. Roughly, about how much [more/less] did you buy than you sold?

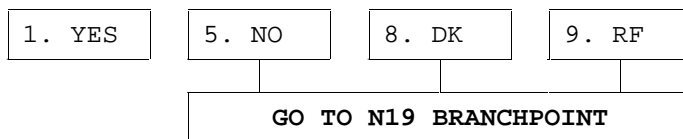
[IWER: DO NOT PROBE DK]



N16a. Did it amount to less than \$200,000, more than \$200,000, or what?	1. LESS THAN \$200,000	3. ABOUT \$200,000	5. MORE THAN \$200,000	8. DK	9. RF
	GO TO N16c	GO TO N17	GO TO N17		
N16b. (Did it amount to) less than \$500,000, more than \$500,000, or what?	1. LESS THAN \$500,000	3. ABOUT \$500,000	5. MORE THAN \$500,000	8. DK	9. RF
	GO TO N17				
N16c. (Did it amount to) less than \$50,000, more than \$50,000, or what?	1. LESS THAN \$50,000	3. ABOUT \$50,000	5. MORE THAN \$50,000	8. DK	9. RF

N17. [Since FINANCIAL R's LAST IW MONTH, YEAR/In the last two years], did you (or your [husband/wife/partner]) make any major additions or home improvements to any real estate properties that you owned, other than your principle residence or second home?

[IWER: DO NOT COUNT GENERAL MAINTENANCE OR UPKEEP]



N18. What was the dollar cost of these additions and improvements, plus the value of any work you may have done yourself?

[IWER: DO NOT PROBE DK]

AMOUNT

DK

RF

**GO TO N19
BRANCHPOINT**

N18a. Did it amount to less than \$10,000, more than \$10,000, or what?	1. LESS THAN \$10,000	3. ABOUT \$10,000	5. MORE THAN \$10,000	8. DK	9. RF
	GO TO N18c	GO TO N19 BRANCHPOINT		GO TO N19 BRANCHPOINT	
N18b. (Did it amount to) less than \$50,000, more than \$50,000, or what?	1. LESS THAN \$50,000	3. ABOUT \$50,000	5. MORE THAN \$50,000	8. DK	9. RF
	GO TO N19 BRANCHPOINT				
N18c. (Did it amount to) less than \$2,000, more than \$2,000, or what?	1. LESS THAN \$2,000.	3. ABOUT \$2,000	5. MORE THAN \$2,000	8. DK	9. RF

N19 BRANCHPOINT: IF R DID NOT REPORT OWNING {ALL OR PART} OF A BUSINESS {AT R's LAST IW and {IN THIS IW (J83 NOT {1 or 2})}}, GO TO N24 BRANCHPOINT

N19. [Since *FINANCIAL R's LAST IW MONTH, YEAR*/In the last two years], have you (or your [husband/wife/partner]) put personal funds into a privately held business, professional practice, partnership or farm that you own or share ownership in?

1. YES

5. NO

8. DK

9. RF

GO TO N21

N20. Altogether, about how much new money did you (or your [husband/wife/partner]) put into that, including any funds that you borrowed personally?

[IWER: DO NOT PROBE DK]

AMOUNT
 DK
RF

GO TO N21

N20a. Did it amount to less than \$50,000, more than \$50,000, or what?	1. LESS THAN \$50,000	3. ABOUT \$50,000	5. MORE THAN \$50,000	8. DK	9. RF
	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>
	GO TO N20c	GO TO N21	GO TO N21		

N20b. (Did it amount to) less than \$500,000, more than \$500,000, or what?	1. LESS THAN \$500,000	3. ABOUT \$500,000	5. MORE THAN \$500,000	8. DK	9. RF
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	GO TO N21				

N20c. (Did it amount to) less than \$5,000, more than \$5,000, or what?	1. LESS THAN \$5,000	3. ABOUT \$5,000	5. MORE THAN \$5,000	8. DK	9. RF
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

N21. [Since *FINANCIAL R's LAST IW MONTH, YEAR*/In the last two years], have you (or your [husband/wife/partner]) sold part or all of any interest in a privately held business, professional practice, partnership or farm?

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

GO TO N24 BRANCHPOINT

N22. Altogether, about how much did you (or your [husband/wife/partner]) sell your interest for?

(What was the selling price?)

[IWER: WE WANT THE PRICE THE BUYER PAID]

[IWER: DO NOT PROBE DK]

AMOUNT	DK	RF
<div style="border: 1px solid black; padding: 5px; display: inline-block;">GO TO N23a</div>		

N22a. Did it amount to less than \$100,000, more than \$100,000, or what?	1. LESS THAN \$100,000	3. ABOUT \$100,000	5. MORE THAN \$100,000	8. DK	9. RF
	GO TO N22c	GO TO N23a		GO TO N23a	
N22b. (Did it amount to) less than \$1,000,000, more than \$1,000,000, or what?	1. LESS THAN \$1,000,000	3. ABOUT \$1,000,000	5. MORE THAN \$1,000,000	8. DK	9. RF
	GO TO N23a				
N22c. (Did it amount to) less than \$10,000, more than \$10,000, or what?	1. LESS THAN \$10,000	3. ABOUT \$10,000	5. MORE THAN \$10,000	8. DK	9. RF

N23a. In what month and year did you sell that?

[IWER: MOST RECENT SALE, IF MORE THAN ONE]

N23a. MONTH:

01. JAN	02. FEB	03. MAR	04. APR	05. MAY
06. JUN	07. JUL	08. AUG	09. SEP	10. OCT
11. NOV	12. DEC	98. DK	99. RF	

DK	RF
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N23b. YEAR

N24 BRANCHPOINT: IF R DID NOT REPORT OWNING {STOCKS OR MUTUAL FUNDS} {AT R'S LAST IW and IN THIS IW (J207 NOT 1)}, GO TO N28d BRANCHPOINT

N24. Not counting any IRAs, Keoghs or pension accounts, [since *FINANCIAL R'S LAST IW MONTH, YEAR* in the last two years], have you (or your [husband/wife/partner]) bought any stock, or put money into stock mutual funds, including any automatic reinvestments?

1. YES	5. NO	8. DK	9. RF
GO TO N27			

N24a. Did you (or your [husband/wife/partner]) also sell or cash in any such assets?

1. YES	5. NO	8. DK	9. RF
GO TO N26			

N24b. Did you buy more or sell more — that is, overall, did you put new money into stocks, stock mutual funds, managed investment accounts or trusts, take money out of them, or put in about as much as you took out?

[IWER: PLEASE PROBE IF DK]

1. PUT MONEY IN	2. TAKE MONEY OUT	3. PUT IN ABOUT AS MUCH AS TOOK OUT	8. DK	9. RF
GO TO N28d BRANCHPOINT				

N25. About how much more did you [put in than you took out/take out than you put in]?

[IWER: DO NOT PROBE DK]

AMOUNT

DK

RF

**GO TO N28d
BRANCHPOINT**

N25a. Did it amount to less than \$10,000, more than \$10,000, or what?	1. LESS THAN \$10,000	3. ABOUT \$10,000	5. MORE THAN \$10,000	8. DK	9. RF
	<div style="border: 1px solid black; padding: 2px; width: 80%; margin: 0 auto;">GO TO N25c</div>	<div style="border: 1px solid black; padding: 2px; width: 80%; margin: 0 auto;">GO TO N28d BRANCHPOINT</div>		<div style="border: 1px solid black; padding: 2px; width: 80%; margin: 0 auto;">GO TO N28d BRANCHPOINT</div>	
N25b. (Did it amount to) less than \$50,000, more than \$50,000, or what?	1. LESS THAN \$50,000	3. ABOUT \$50,000	5. MORE THAN \$50,000	8. DK	9. RF
	<div style="border: 1px solid black; padding: 2px; width: 80%; margin: 0 auto;">GO TO N28d BRANCHPOINT</div>				
N25c. (Did it amount to) less than \$2,500, more than \$2,500, or what?	1. LESS THAN \$2,500	3. ABOUT \$2,500	5. MORE THAN \$2,500	8. DK	9. RF
	<div style="border: 1px solid black; padding: 2px; width: 80%; margin: 0 auto;">GO TO N28d BRANCHPOINT</div>				

N26. Altogether, how much money (including any automatic reinvestment) did you (or your [husband/wife/partner]) put into that?

[IWER: DO NOT PROBE DK]

_____	DK	RF
AMOUNT		
GO TO N28d BRANCHPOINT		

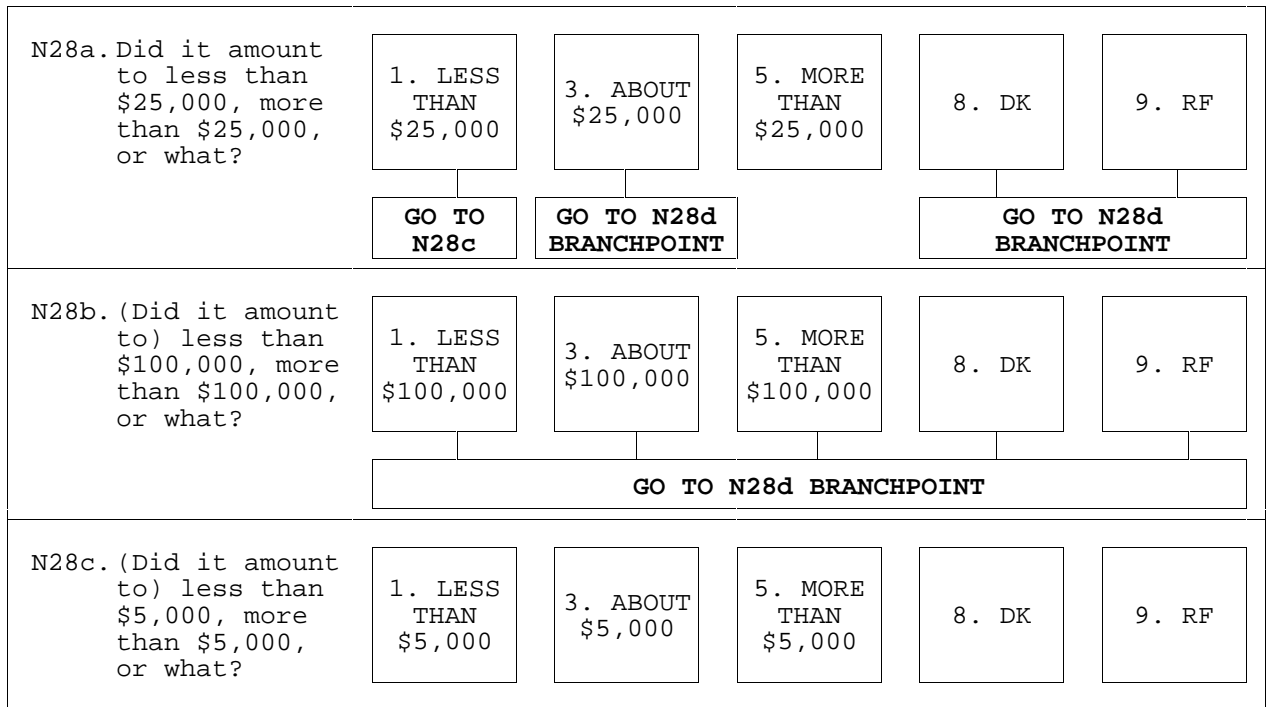
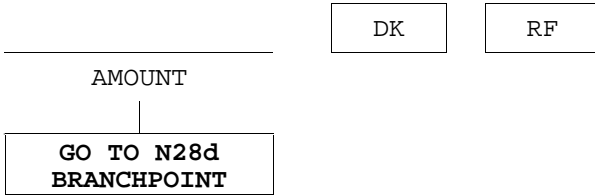
N26a. Did it amount to less than \$25,000, more than \$25,000, or what?	1. LESS THAN \$25,000	3. ABOUT \$25,000	5. MORE THAN \$25,000	8. DK	9. RF
	GO TO N26c	GO TO N28d BRANCHPOINT		GO TO N28d BRANCHPOINT	
N26b. (Did it amount to) less than \$100,000, more than \$100,000, or what?	1. LESS THAN \$100,000	3. ABOUT \$100,000	5. MORE THAN \$100,000	8. DK	9. RF
	GO TO N28d BRANCHPOINT				
N26c. (Did it amount to) less than \$5,000, more than \$5,000, or what?	1. LESS THAN \$5,000	3. ABOUT \$5,000	5. MORE THAN \$5,000	8. DK	9. RF
	GO TO N28d BRANCHPOINT				

N27. [Since *FINANCIAL R'S LAST IW MONTH, YEAR*/In the last two years], have you (or your [husband/wife/partner]) sold any shares of stock in publicly held corporations or taken money out of any mutual funds, managed investment accounts or trusts?

1. YES	5. NO	8. DK	9. RF
GO TO N28d BRANCHPOINT			

N28. Altogether, how much money did you (or your [husband/wife/partner]) get from that?

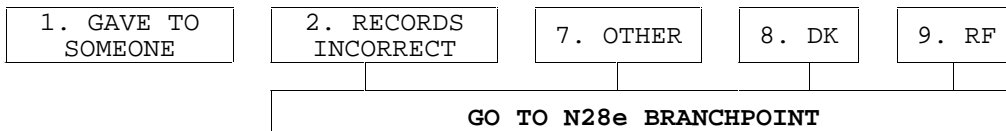
[IWER: DO NOT PROBE DK]



N28d BRANCHPOINT: IF R DID NOT REPORT OWNING A HOME AT R's LAST IW or R WAS ASKED ABOUT THE VALUE OF A {MAIN OR SECOND} HOME IN THIS IW (WAS ASKED {F6 or F46f}), GO TO N29 BRANCHPOINT

IF R DID NOT REPORT THAT S/HE DID NOT {BUY OR SELL} A {MAIN OR SECOND} HOME SINCE R's LAST IW (N1 NOT 5), GO TO N28e BRANCHPOINT

N28d. Our records show that you owned a home in [FINANCIAL R's LAST IW MONTH, YEAR/the last two years] that you do not now own and did not sell. What happened to that home — did you give it to someone, are our records incorrect, or what?



N28f. Who did you give the house to, (that is, what is their relationship to you)?

[IWER: CHOOSE ALL THAT APPLY]

2. CHILD/CHILD-IN-LAW /GRANDCHILD	3. OTHER RELATIVE	4. SOMEONE ELSE	8. DK	9. RF
GO TO N28e BRANCHPOINT				

N28g. (Which child is that?)

[IWER: CHOOSE ALL THAT APPLY]

IF GRANDCHILD:

Which child of yours (or your [husband/wife/partner]) is the parent of that grandchild?

CHILD NAME(S) [DISPLAYED BY SURVEYCRAFT FROM PREVIOUS RESPONSES]
01. TO 20. CHILD NAME(S)
[ROWS PROVIDED BY SURVEYCRAFT AS NECESSARY]
37. DECEASED CHILD
38. ALL CHILDREN EQUALLY
DK
RF

N28e BRANCHPOINT: IF R SOLD BUT DID NOT BUY A HOME (N1a NOT 2), GO TO N29 BRANCHPOINT

N28e. Our records show that you owned a home in [FINANCIAL R's LAST IW MONTH, YEAR/the last two years] that you have since sold.

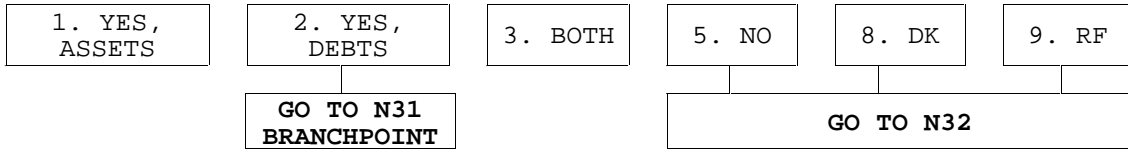
What did you decide to do with the proceeds from selling the house —did you invest the money, did you give it to someone, are our records incorrect, or what?

1. INVEST THE MONEY	2. GAVE TO SOMEONE	3. RECORDS INCORRECT	7. OTHER	8. DK	9. RF
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N29 BRANCHPOINT: IF NO ONE MOVED {IN OR OUT} OF THE FINANCIAL R SINCE R's LAST IW, GO TO NASSIST (AFTER N34c)

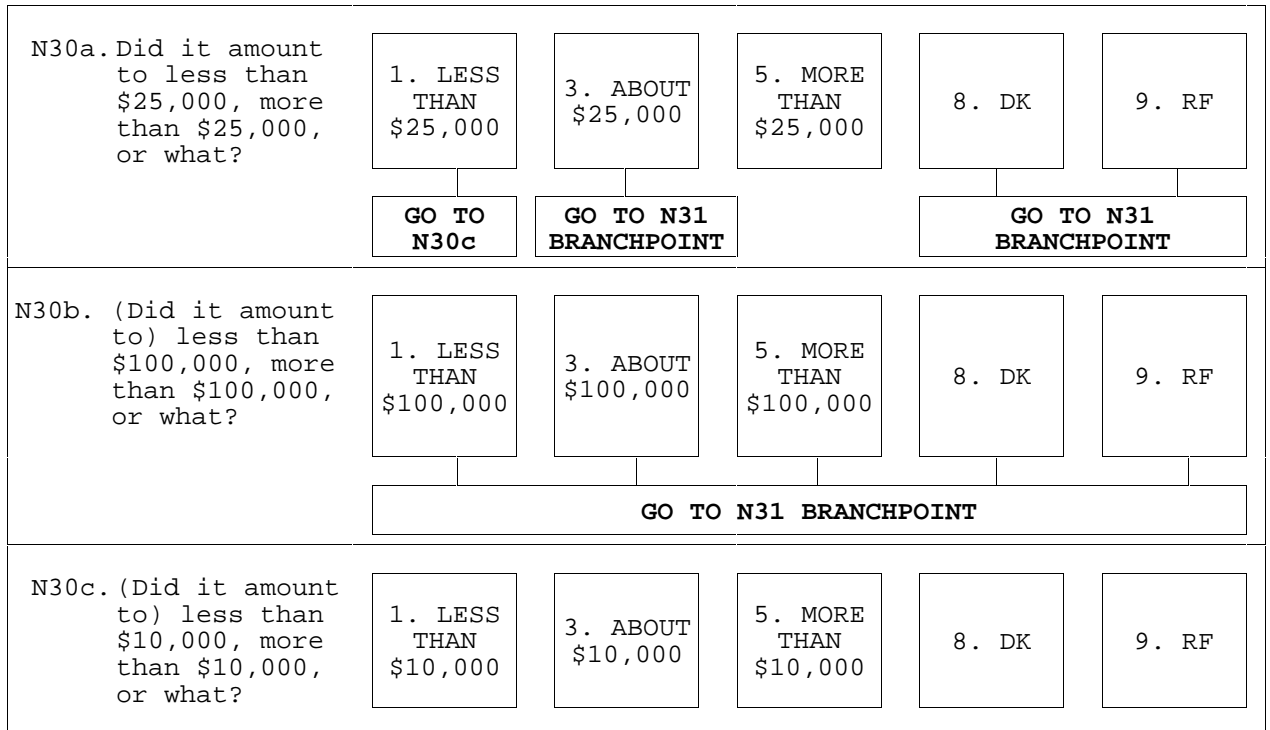
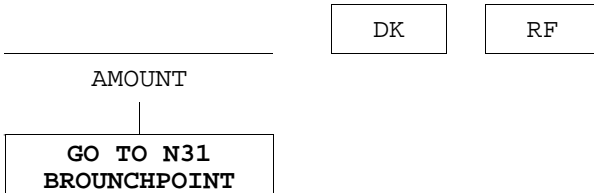
N29. Sometimes changes in a family's savings or assets are due to people joining or leaving the family.

Was there anyone living with you in [*FINANCIAL R's LAST IW MONTH, YEAR*/the last two years] who doesn't live with you now and who took \$5,000 or more in assets or debts away with them?



N30. Altogether, what is the total dollar value of assets that were removed that way?

[IWER: DO NOT PROBE DK]



N31 BRANCHPOINT: IF R DID NOT SAY THAT DEBTS WERE REMOVED FROM THE HH BY A HH MEMBER LEAVING (N29 NOT 2), GO TO N32

N31. Altogether, what is the total dollar value of debts that were removed that way?

[IWER: DO NOT PROBE DK]

_____	DK	RF
AMOUNT		
GO TO N32		

N31a. Did it amount to less than \$10,000, more than \$10,000, or what?	1. LESS THAN \$10,000	3. ABOUT \$10,000	5. MORE THAN \$10,000	8. DK	9. RF
	GO TO N31c	GO TO N32	GO TO N32		
N31b. (Did it amount to) less than \$25,000, more than \$25,000, or what?	1. LESS THAN \$25,000	3. ABOUT \$25,000	5. MORE THAN \$25,000	8. DK	9. RF
	GO TO N32				
N31c. (Did it amount to) less than \$5,000, more than \$5,000, or what?	1. LESS THAN \$5,000	3. ABOUT \$5,000	5. MORE THAN \$5,000	8. DK	9. RF

N32. Is there anyone in your family living with you now who has joined the family [since *FINANCIAL R's LAST IW MONTH, YEAR*/in the last two years] and who had \$5,000 or more in assets or debts at the time they joined the family?

1. YES, ASSETS	2. YES, DEBTS	3. BOTH	5. NO	8. DK	9. RF
	GO TO N34 BRANCHPOINT		GO TO NASSIST (AFTER N34c)		

N33. Altogether, what was the total dollar value of assets that were brought into the family in that way?

[IWER: DO NOT PROBE DK]

AMOUNT

DK

RF

**GO TO N34
BRANCHPOINT**

N33a. Did it amount to less than \$25,000, more than \$25,000, or what?	1. LESS THAN \$25,000	3. ABOUT \$25,000	5. MORE THAN \$25,000	8. DK	9. RF
	GO TO N33c	GO TO N34 BRANCHPOINT		GO TO N34 BRANCHPOINT	
N33b. (Did it amount to) less than \$100,000, more than \$100,000, or what?	1. LESS THAN \$100,000	3. ABOUT \$100,000	5. MORE THAN \$100,000	8. DK	9. RF
	GO TO N34 BRANCHPOINT				
N33c. (Did it amount to) less than \$10,000, more than \$10,000, or what?	1. LESS THAN \$10,000	3. ABOUT \$10,000	5. MORE THAN \$10,000	8. DK	9. RF

N34 BRANCHPOINT: IF R DID NOT SAY THAT DEBTS WERE ADDED TO THE HH BY A NEW HH MEMBER MOVING IN (N32 NOT 2), GO TO NASSIST (AFTER N34c)

N34. Altogether, what was the total dollar value of debts that were brought into the family in that way?

[IWER: DO NOT PROBE DK]

AMOUNT

DK	RF
----	----

**GO TO NASSIST
(AFTER N34c)**

<p>N34a. Did it amount to less than \$10,000, more than \$10,000, or what?</p>	<p>1. LESS THAN \$10,000</p>	<p>3. ABOUT \$10,000</p>	<p>5. MORE THAN \$10,000</p>	<p>8. DK</p>	<p>9. RF</p>
	<div style="border: 1px solid black; padding: 2px;">GO TO N34c</div>	<div style="border: 1px solid black; padding: 2px;">GO TO NASSIST (AFTER N34c)</div>	<div style="border: 1px solid black; padding: 2px;">GO TO NASSIST (AFTER N34c)</div>		
<p>N34b. (Did it amount to) less than \$25,000, more than \$25,000, or what?</p>	<p>1. LESS THAN \$25,000</p>	<p>3. ABOUT \$25,000</p>	<p>5. MORE THAN \$25,000</p>	<p>8. DK</p>	<p>9. RF</p>
<div style="border: 1px solid black; padding: 2px;">GO TO NASSIST (AFTER N34c)</div>					
<p>N34c. (Did it amount to) less than \$5,000, more than \$5,000, or what?</p>	<p>1. LESS THAN \$5,000</p>	<p>3. ABOUT \$5,000</p>	<p>5. MORE THAN \$5,000</p>	<p>8. DK</p>	<p>9. RF</p>

NASSIST

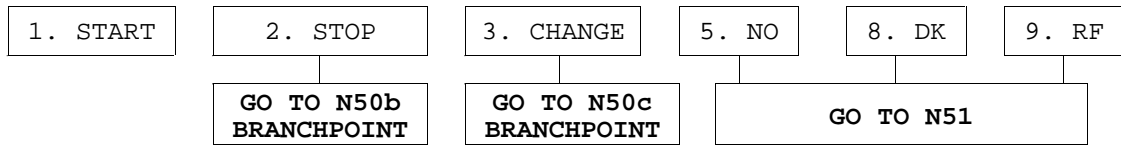
IWER: HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN SECTION N - CAPITAL GAINS?

1. NEVER	2. A FEW TIMES	3. MOST OR ALL OF THE TIME
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N50 BRANCHPOINT: IF R DID NOT REPORT {THAT DOES NOT HAVE SAME SPOUSE/PARTNER AS R'S LAST IW (CS4 NOT 5) or THAT HAS NOT BECOME {DIVORCED OR WIDOWED} SINCE R'S LAST IW (A41 NOT {1 or 2}), GO TO SECTION R

N50. IF R IS WIDOWED (CS5=5 or A41=2):
 Financial situations often change with the death of a [husband/wife/partner].
 Thinking back to the time surrounding your [husband/wife/partner]'s death, did any income from Social Security start, stop or change because of [his/her] death.

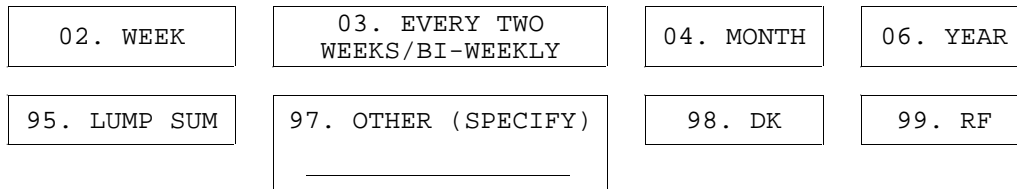
IF R IS DIVORCED OR HAD AN ANNULMENT (CS5 NOT 5 or A41=1):
 Financial situations often change with divorce.
 Thinking back to your divorce, did any income from Social Security start, stop, or change because of it?



N50a. What was the usual amount after [your [husband/wife/partner]'s death/the divorce]?



N50aa. PER:



N50b BRANCHPOINT: IF SOCIAL SECURITY STARTED BECAUSE OF SPOUSE DEATH OR DIVORCE (N50=1), GO TO N51

N50b. What was the usual amount before [your [husband/wife/partner]'s death/the divorce]?

AMOUNT	DK	RF		
	GO TO N50c BRANCHPOINT			

N50ba. PER:

02. WEEK	03. EVERY TWO WEEKS/BI-WEEKLY	04. MONTH	06. YEAR
95. LUMP SUM	97. OTHER (SPECIFY) _____	98. DK	99. RF

N50c BRANCHPOINT: IF SOCIAL SECURITY DID NOT CHANGE BECAUSE OF DEATH OR DIVORCE (N50 NOT 3), GO TO N51

N50c. What was the usual amount before [your [husband/wife/partner]'s death/the divorce]?

AMOUNT	DK	RF		
	GO TO N50d			

N50ca. PER:

02. WEEK	03. EVERY TWO WEEKS/BI-WEEKLY	04. MONTH	06. YEAR
95. LUMP SUM	97. OTHER (SPECIFY) _____	98. DK	99. RF

N50d. What was it after?

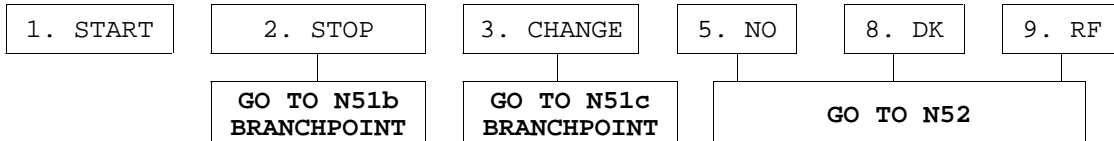
AMOUNT	DK	RF		
	GO TO N51			

N50da. PER:

02. WEEK	03. EVERY TWO WEEKS/BI-WEEKLY	04. MONTH	06. YEAR
95. LUMP SUM	97. OTHER (SPECIFY) _____	98. DK	99. RF

N51. IF R IS WIDOWED (CS5=5 or A41=2):
Did any income from Supplemental Security Income start, stop, or change because of [his/her] death?

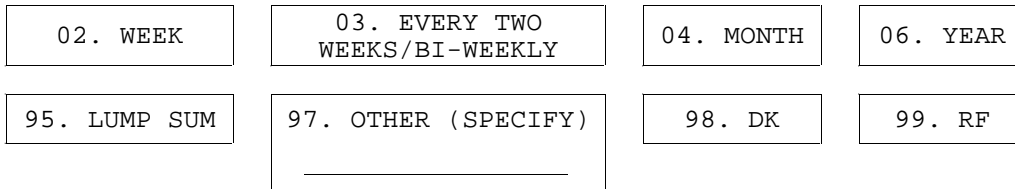
IF R IS DIVORCED OR HAD AN ANNULMENT (CS5 NOT 5 or A41=1):
Did any income from Supplemental Security Income start, stop, or change because of the divorce?



N51a. What was the usual amount after [your [husband/wife/partner]'s death/the divorce]?

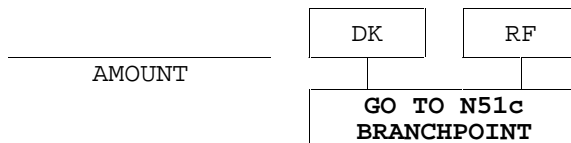


N51aa. PER:

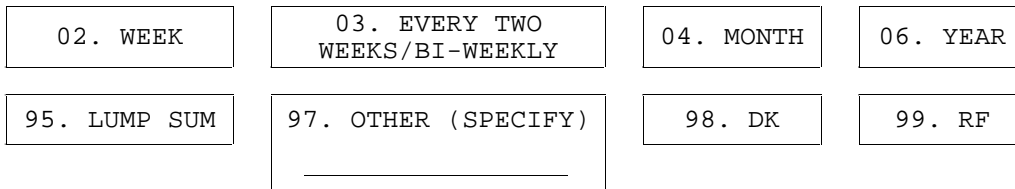


N51b BRANCHPOINT: IF SUPPLEMENTAL SECURITY INCOME STARTED DUE TO DEATH OR DIVORCE (N51=1), GO TO N52

N51b. What was the usual amount before [your [husband/wife/partner]'s death/the divorce]?



N51ba. PER:



N51c BRANCHPOINT: IF SUPPLEMENTAL SECURITY INCOME DID NOT CHANGE DUE TO DEATH OR DIVORCE (N51 NOT 3) GO TO N52

N51c. What was the usual amount before [your [husband/wife/partner]'s death/the divorce]?

_____	DK	RF
AMOUNT		
GO TO N51d		

N51ca. PER:

02. WEEK	03. EVERY TWO WEEKS/BI-WEEKLY	04. MONTH	06. YEAR
95. LUMP SUM	97. OTHER (SPECIFY) _____	98. DK	99. RF

N51d. What was it after?

_____	8. DK	9. RF
AMOUNT		
GO TO N52		

N51da. PER:

02. WEEK	03. EVERY TWO WEEKS/BI-WEEKLY	04. MONTH	06. YEAR
95. LUMP SUM	97. OTHER (SPECIFY) _____	98. DK	99. RF

N52. IF R IS WIDOWED (CS5=5 or A41=2):
Did any income from Veterans benefits start, stop, or change because of [his/her] death?

IF R IS DIVORCED OR HAD AN ANNULMENT (CS5 NOT 5 or A41=1):
Did any income from Veterans benefits start, stop, or change because of the divorce?

1. START	2. STOP	3. CHANGE	5. NO	8. DK	9. RF
GO TO N52b BRANCHPOINT		GO TO N52c BRANCHPOINT	GO TO N53		

N52a. What was the usual amount after [your [husband/wife/partner]'s death/the divorce]?

	DK	RF
AMOUNT	GO TO N52b BRANCHPOINT	

N52aa. PER:

02. WEEK	03. EVERY TWO WEEKS/BI-WEEKLY	04. MONTH	06. YEAR
95. LUMP SUM	97. OTHER (SPECIFY) _____	98. DK	99. RF

N52b BRANCHPOINT: IF VETERANS BENEFITS STARTED DUE TO DEATH OR DIVORCE, (52=1), GO TO N53

N52b. What was the usual amount before [your [husband/wife/partner]'s death/the divorce]?

	DK	RF
AMOUNT	GO TO N52c BRANCHPOINT	

N52ba. PER:

02. WEEK	03. EVERY TWO WEEKS/BI-WEEKLY	04. MONTH	06. YEAR
95. LUMP SUM	97. OTHER (SPECIFY) _____	98. DK	99. RF

N52c BRANCHPOINT: IF VETERANS BENEFITS DID NOT CHANGE DUE TO DEATH OR DIVORCE (N52 NOT 3), GO TO N53

N52c. What was the usual amount before your [husband/wife/partner]'s death/the divorce]?

_____	DK	RF
AMOUNT		
GO TO N52d		

N52ca. PER:

02. WEEK	03. EVERY TWO WEEKS/BI-WEEKLY	04. MONTH	06. YEAR
95. LUMP SUM	97. OTHER (SPECIFY) _____	98. DK	99. RF

N52d. What was it after?

_____	8. DK	9. RF
AMOUNT		
GO TO N53		

N52da. PER:

02. WEEK	03. EVERY TWO WEEKS/BI-WEEKLY	04. MONTH	06. YEAR
95. LUMP SUM	97. OTHER (SPECIFY) _____	98. DK	99. RF

N53. Did any income from other retirement pensions or annuities start, stop, or change because of [[his/her] death/the divorce]?

1. START	2. STOP	3. CHANGE	5. NO	8. DK	9. RF
GO TO N53b BRANCHPOINT		GO TO N53c BRANCHPOINT	GO TO N54		

N53a. What was the usual amount after [your [husband/wife/partner]'s death/the divorce]?

	DK	RF
AMOUNT	GO TO N53b BRANCHPOINT	

N53aa. PER:

02. WEEK	03. EVERY TWO WEEKS/BI-WEEKLY	04. MONTH	06. YEAR
95. LUMP SUM	97. OTHER (SPECIFY) _____	98. DK	99. RF

N53b BRANCHPOINT: IF RETIREMENT BENEFITS STARTED DUE TO DEATH OR DIVORCE (N53=1), GO TO N53

N53b. What was the usual amount before [your [husband/wife/partner]'s death/the divorce]?

	DK	RF
AMOUNT	GO TO N53c BRANCHPOINT	

N53ba. PER:

02. WEEK	03. EVERY TWO WEEKS/BI-WEEKLY	04. MONTH	06. YEAR
95. LUMP SUM	97. OTHER (SPECIFY) _____	98. DK	99. RF

N53c BRANCHPOINT: IF RETIREMENT BENEFITS DID NOT CHANGE DUE TO DEATH OR DIVORCE (N53 NOT 3) GO TO N54

N53c. What was the usual amount before [your [husband/wife/partner]'s death/the divorce]?

	DK	RF
AMOUNT		
	GO TO N53d	

N53aa. PER:

02. WEEK	03. EVERY TWO WEEKS/BI-WEEKLY	04. MONTH	06. YEAR
95. LUMP SUM	97. OTHER (SPECIFY) _____	98. DK	99. RF

N53d. What was it after?

	8. DK	9. RF
AMOUNT		
	GO TO N54	

N53da. PER:

02. WEEK	03. EVERY TWO WEEKS/BI-WEEKLY	04. MONTH	06. YEAR
95. LUMP SUM	97. OTHER (SPECIFY) _____	98. DK	99. RF

N54. IF R IS WIDOWED (CS5=5 or A41=2):
Did your earnings from work or your work hours start, stop, or change after [he/she] died?

IF R IS DIVORCED OR HAD AN ANNULMENT (CS5 NOT 5 or A41=1):
Did your earnings from work or your work hours start, stop or change after the divorce?

1. START	2. STOP	3. CHANGE	5. NO	8. DK	9. RF
	GO TO N54b BRANCHPOINT	GO TO N54c BRANCHPOINT	GO TO N56		

N54a. What was the usual amount after [your [husband/wife/partner]'s death/the divorce]?

_____	DK	RF
AMOUNT	GO TO N72 (AFTER N54aa)	

N54aa. PER:

02. WEEK	03. EVERY TWO WEEKS/BI-WEEKLY	04. MONTH	06. YEAR
95. LUMP SUM	97. OTHER (SPECIFY) _____	98. DK	99. RF

N72. IF R IS WIDOWED (CS5=5 or A41=2):
And how many hours per week did you usually work after your [husband/wife/partner]'s death?

IF R IS DIVORCED OR HAD AN ANNULMENT (CS5 NOT 5 or A41=1):
And how many hours per week did you usually work after the divorce?

_____	DK	RF
HOURS		

N54b BRANCHPOINT: IF R's WORK EARNINGS STARTED AFTER DEATH OR DIVORCE (N54=1), GO TO N56

N54b. What was the usual amount before [your [husband/wife/partner]'s death/the divorce]?

_____	DK	RF
AMOUNT	GO TO N54c	

N54ba. PER:

02. WEEK	03. EVERY TWO WEEKS/BI-WEEKLY	04. MONTH	06. YEAR
95. LUMP SUM	97. OTHER (SPECIFY) _____	98. DK	99. RF

N54c. IF R IS WIDOWED (CS5=5 or A41=2):
 And how many hours per week did you usually work before your
 [husband/wife/partner]'s death?

IF R IS DIVORCED OR HAD AN ANNULMENT (CS5 NOT 5 or A41=1):
 And how many hours per week did you usually work before the divorce?

HOURS

DK

RF

N54d BRANCHPOINT: IF R'S WORK EARNINGS DID NOT CHANGE AFTER DEATH OR DIVORCE
 (N54 NOT 3), GO TO N56

N54d. What was the usual amount before [your [husband/wife/partner]'s
 death/the divorce]?

AMOUNT

DK

RF

GO TO N54e

N54da. PER:

02. WEEK	03. EVERY TWO WEEKS/BI-WEEKLY	04. MONTH	06. YEAR
95. LUMP SUM	97. OTHER (SPECIFY) _____	98. DK	99. RF

N54e. What was it after?

AMOUNT

8. DK

9. RF

GO TO N55

N54ea. PER:

02. WEEK	03. EVERY TWO WEEKS/BI-WEEKLY	04. MONTH	06. YEAR
95. LUMP SUM	97. OTHER (SPECIFY) _____	98. DK	99. RF

N55. How many hours per week did you usually work before [your [husband/wife/
 partner]'s death/the divorce]?

HOURS

DK

RF

N55a. And how many after?

HOURS

N56. IF R IS WIDOWED (CS5=5 or A41=2):
Did the type, cost, or coverage of your health insurance change as a result of your [husband/wife/partner]'s death?

IF R IS DIVORCED OR HAD AN ANNULMENT (CS5 NOT 5 or A41=1):
Did the type, cost, or coverage of your health insurance change from the divorce?

N56a. What changed about your health insurance?

[IWER: CHOOSE ALL THAT APPLY]

N57 BRANCHPOINT: IF R DID NOT REPORT IN THIS IW THAT LAST-IW SPOUSE IS DEAD (CS5 NOT 5) and R DID NOT REPORT BEING WIDOWED SINCE R's LAST IW (A41 NOT 2), GO TO N65

N57. Did you receive a life insurance settlement?

(Please include any that you may have already mentioned.)

N57a. How much did it amount to?

AMOUNT

N58. Did you receive a lump-sum pension settlement?

1. YES	5. NO	8. DK	9. RF
GO TO N63			

N58a. How much did it amount to?

AMOUNT

DK	RF
----	----

N63. To pay the expenses associated with [his/her] illness and death, did you have to sell assets, withdraw money that normally would not be touched, get help from a relative, or do anything else special to find the money?

[IWER: CHECK ALL THAT APPLY]

1. YES, SELL ASSETS	2. YES, WITHDRAW MONEY	3. YES, GOT HELP FROM A RELATIVE	
GO TO N63c			
5. DID NOT DO ANYTHING SPECIAL	7. YES, OTHER (SPECIFY) _____	8. DK	9. RF
GO TO N63c			

N63a. Was that a (child or other) relative of yours (or your [husband/wife/partner]), or was it someone else who helped?

1. CHILD/ CHILD-IN-LAW/ GRANDCHILD	2. OTHER RELATIVE	3. SOMEONE ELSE	7. INSTITUTION OR CHARITY	8. DK	9. RF
GO TO N63c					

N63b. (Which child is that?)

IF GRANDCHILD:

Which child of yours (or your [husband/wife/partner]) is the parent of that grandchild?

CHILD NAME(S) [DISPLAYED BY SURVEYCRAFT FROM PREVIOUS RESPONSES]
01. TO 20. CHILD NAME(S)
[ROWS PROVIDED BY SURVEYCRAFT AS NECESSARY]
37. DECEASED CHILD
38. ALL CHILDREN EQUALLY
DK
RF

N63c. IF PROXY IW:

In which state or country did [he/she] die?

IF SELF IW:

In which state or country did your [husband/wife/partner] die?

STATE

97. OTHER (SPECIFY) — INCLUDE OUT OF THE COUNTRY _____
--

98. DK

99. RF

NOTE: THE IWER SELECTS FROM A MENU OF STATE NAMES, INCLUDING WASHINGTON, D.C., AND PUERTO RICO

N63d. What was the cause of [his/her] death?

CAUSE OF DEATH

DK

RF

N64 BRANCHPOINT: IF THIS IS A PROXY INTERVIEW, GO TO N6

IF R IS WIDOWED, GO TO N65

N64. Because of the divorce, do you expect to receive less in the way of life insurance benefits if your former [husband/wife/partner] dies?

1. YES

5. NO

8. DK

9. RF

N65. Did you lose any part of your claim on your [former/late] [husband/wife/partner]'s pension?

1. YES	5. NO	8. DK	9. RF
GO TO N67			

N66. Did you receive any money or property from your [former/late] [husband/wife/partner] to compensate for the loss of your claim on [his/her] pension?

1. YES	5. NO	8. DK	9. RF
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N67 BRANCHPOINT: IF R'S SPOUSE FROM PREVIOUS WAVE IS NO LONGER LIVING (CS5=5) or R IS WIDOWED (A41=2), GO TO WN2 ASSIST

N67. All in all, what were your expenses associated with the divorce, that is, legal fees and costs?

AMOUNT

DK	RF
----	----

WASSIST

IWER: HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN SECTION N - WIDOWHOOD/DIVORCE?

1. NEVER	2. A FEW TIMES	3. MOST OR ALL OF THE TIME
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GO TO SECTION R