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

GH1/L005 BRANCHPOINT: IF R NEVER WORKED FOR PAY (GG1/K003={5 or DK or RF}) or
THIS IS A REINTERVIEW R, GO TO SECTION M

IF R REPORTED THAT HAS NOT WORKED FOR PAY IN 20 YEARS OR MORE
(per GG1a1/K004 or GG1a2/K005), GO TO GH52Y4/L068

IF R REFUSED TO SAY WHEN HE/SHE LAST WORKED (\{GG1a1/K004 or
GG1a2/K005\}=RF), GO TO SECTION M

L005
Q4092
GH1. 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?

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

GO TO (GH42)/L039

L006
Q4093
GH2. For how many such employers have you worked?

1. ONE  2. TWO  3. THREE  4. FOUR

5. FIVE OR MORE  8. DK  9. RF

L007
Q4094
GH3. (I want to ask about the most recent such job.)

Were you working for someone else, were you self-employed, or what?

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

1. SOMEONE ELSE  2. SELF-EMPLOYED  8. DK  9. RF

GO TO GH4/L009

GH3a/L008 BRANCHPOINT: IF R IS FROM {AHEAD or CODA} COHORT, GO TO GH4/L009

L008
Q4095
GH3a. For whom did you work?

(What is the [company's/organization's] name?)

______________________________  DK   RF
EMPLOYER NAME

L009  Q4096
GH4. When did you start working for [that employer/yourself]?

______________________________ OR ____________________________ OR
L009  Q4096  L010  Q4097  L011  Q4098
GH4. YEAR  GH4Y1. YEARS AGO  GH4Y2. AT AGE

L013  Q4101
GH5. IF SELF-EMPLOYED (GH3/L007=2):
What kind of industry did you work in? That is, what did your company do or make?

(What industry did you typically work in?)

IF NOT SELF-EMPLOYED (GH3/L007 NOT 2):
What kind of business or industry did you work in -- that is, what did they make or do at the place where you worked?

______________________________  DK   RF
INDUSTRY

GH5a/L014 BRANCHPOINT: IF R WAS SELF-EMPLOYED (GH3/L007=2) or R IS FROM {AHEAD or CODA} COHORT, GO TO GH6/L015

L014  Q4102
GH5a. What was the official title of your job?

(The title that your employer used?)

______________________________  DK   RF
TITLE

L015  Q4103
GH6. What sort of work did you do?

(Tell me a little more about what you did.)

______________________________  DK   RF
TYPE OF WORK
L016  
Q4104  
GH7. When did you [leave that employer/stop working for yourself]?  

OR  
L016  
Q4104  
GH7. YEAR  

OR  
L017  
Q4105  
GH7Y1. YEARS AGO  

OR  
L018  
Q4106  
GH7Y2. AT AGE  

L020  
Q4109  
GH8. During your last full year at that job, how many hours a week did you usually work?  

HOURS PER WEEK  

L021  
Q4110  
GH9. IWER: READ SLOWLY:  
Counting paid vacations as weeks of work, how many weeks did you work that year?  

NUMBER OF WEEKS
GH10. How much were you earning, before taxes and other deductions, that year?

[IWER: IF RESPONDENT WAS A TEACHER, RECORD ANNUAL SALARY]

[IWER: IF R REPORTS A 'PER HOUR' AMOUNT, BE SURE TO RECORD CENTS IF APPLICABLE]

[IWER: USE ZERO FOR NONE]

<table>
<thead>
<tr>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
</tr>
<tr>
<td>DK</td>
</tr>
<tr>
<td>RF</td>
</tr>
</tbody>
</table>

GO TO GH11/L025 BRANCHPOINT

GH10Y1. [IWER: PROBE IF NECESSARY]
Was that per hour, week, month, or year?

PER:

<table>
<thead>
<tr>
<th>01. HOUR</th>
<th>02. WEEK</th>
<th>03. EVERY TWO WEEKS/BI-WEEKLY</th>
<th>04. MONTH</th>
<th>05. TWICE A MONTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>06. YEAR</td>
<td>97. OTHER (SPECIFY)</td>
<td>98. DK</td>
<td>99. RF</td>
<td></td>
</tr>
</tbody>
</table>

L024

GH11/L025 BRANCHPOINT: IF R IS FROM {AHEAD or CODA} COHORT, GO TO GH12/L027

L025

GH11. Why did you [stop working at this business/leave that employer]?

[IWER: ASK IF NECESSARY]
(Did the business close, were you laid off or let go, did you leave to take care of family members, or what?)

<table>
<thead>
<tr>
<th>1. BUSINESS CLOSED</th>
<th>2. LAID OFF/LET GO</th>
<th>3. POOR HEALTH/DISABLED</th>
<th>4. FAMILY CARE</th>
<th>5. BETTER JOB</th>
</tr>
</thead>
<tbody>
<tr>
<td>6. QUIT</td>
<td>7. RETIRED</td>
<td>97. OTHER (SPECIFY)</td>
<td>98. DK</td>
<td>99. RF</td>
</tr>
</tbody>
</table>

L026

L027

GH12. (Aside from IRA or Keogh Plans,) were you included in a pension or retirement plan, or in any tax-deferred savings plan, [through your work/when you worked for [that employer/yourself]]?

<table>
<thead>
<tr>
<th>1. YES</th>
<th>5. NO</th>
<th>8. DK</th>
<th>9. RF</th>
</tr>
</thead>
</table>
L028
Q4118
GH12a. In how many different pension plans were you included on this job?

1 — 8 PLANS

NUMBER OF PLANS

<table>
<thead>
<tr>
<th>0</th>
<th>DK</th>
<th>RF</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO BEGINNING OF GH13/LW001_3 LOOP</td>
<td>GO TO GH21/LW158_4 BRANCHPOINT</td>
<td>GO TO GH21/LW158_4 BRANCHPOINT</td>
</tr>
</tbody>
</table>

L029
Q8256
(GH12b) Is this just one plan or more than one?

<table>
<thead>
<tr>
<th>1. ONE PLAN</th>
<th>3. MORE THAN ONE</th>
<th>8. DK</th>
<th>9. RF</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>GO TO GH21/LW158_4 BRANCHPOINT</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
BEGINNING OF PENSION BLOCK-3:
(GH13/J088/LW001_3 — GH20/J157/LW042_3)

NOTE: THE FOLLOWING PENSION LOOP (GH13/LW001_3 — GH20/LW042_3) IS A REPLICATE
OF THAT APPEARING IN SECTION J (G31/J088/JW001_1 — G38/J157/JW042_1)
(EXCEPT THAT QUESTIONS LW029 & LW034 WERE ADDED TO THE FIRST OCCURRENCE
OF THE BLOCK IN L) AND IS KNOWN AS THE SECTION J PENSION BLOCK.

***BEGINNING OF GH13/LW001_3 LOOP: QUESTIONS GH13/LW001_3 THROUGH GH20/LW042_3
ARE REPEATED FOR UP TO FOUR PENSION PLANS IF R REPORTED THE NUMBER OF PLANS AT
GH12a/L028 (GH12a/L028 ={1-8}) OR FOR UP TO TWO PLANS IF R REPORTED HAVING
PLANS AT (GH12b/L029) ((GH12b/L029) ={1 or 3}).***

LW001_3
J088
Q4120
GH13. IF THIS IS THE FIRST PLAN and {R HAS MORE THAN ONE PLAN (GH12a/L028 ≥2
or (GH12b/L029)=3)}:
Now I have some questions about the most important of these plans. I
would like to know what type of plan this was.

IF THIS IS THE SECOND, THIRD OR FOURTH PLAN FOR (GH12a/L028 ≥2) or THE
SECOND PLAN FOR ((GH12b/L029)=3):
Now I have some questions about the next most important of these plans.
I would like to know what type of plan this was.

IF R HAS ONLY ONE PLAN (GH12a/L028 or (GH12b/L029)=1):
I would like to know what type of plan this was.

READ TO ALL Rs ON THE FIRST LOOP:
In some retirement plans, call them Type A, benefits are usually based
on a formula involving age, years of service and salary. In other plans,
call them Type B, money is accumulated in an account for you.

NOTE: IF R HAS ALREADY BEEN THROUGH THE LOOP ONCE, THE EXPLANATION,
ABOVE, APPEARS IN PARENTHESES AND IS READ AT THE IWER’s DISCRETION.

ASK ALL Rs:
Was your plan Type A or Type B?

DEFINITION: 401-K, 403-B, ESOP, SRA, THRIFT/SAVINGS, STOCK/PROFIT-
SHARING, MONEY PURCHASE PLANS, AND CASH BALANCE PLANS ARE ALL TYPE B
RETIREMENT PLANS.
TYPE A PLANS ARE OFTEN CALLED "DEFINED BENEFIT" PLANS.
TYPE B PLANS ARE OFTEN CALLED "DEFINED CONTRIBUTION."
LW002_3
Q4121
GH13a. IF R HAS BOTH TYPES OF PLAN (GH13/LW001_3=3):
For the part of your pension where money is accumulated in an account, how much money was in your account when you left that [business/employer]?

OTHERWISE:
How much money was in your account when you left that [business/employer]?

[IWER: DO NOT PROBE DK/RF]

AMOUNT

GO TO
GH13b/LW006_3

LW003_3 - LW005_3 Unfolding Sequence
Question text: Did it amount to a total of less than $____ , more than $____ , or what?

PROCEDURE: 2Up1Down
BREAKPOINTS: $5,000, $20,000, $50,000, $150,000
ENTRY POINT: $20,000

LW006_3
Q4112
GH13b. When you left that [business/employer], did you withdraw the money, roll it over into an IRA, leave it to accumulate in the old plan, convert it to an annuity, or what?

[IWER: DO NOT PROBE, BUT CHOOSE ALL THAT APPLY AND ASK ALL APPROPRIATE FOLLOW-UP QUESTIONS]
LW008_3 BRANCHPOINT: IF R DID NOT REPORT THAT MONEY WAS LEFT TO ACCUMULATE IN PENSION ACCOUNT (GH13b/LW006_3 NOT 3), GO TO LW013_3 BRANCHPOINT

IF MONEY IN PENSION ACCOUNT WAS LEFT TO ACCUMULATE ONLY (GH13b/LW006_3=3 ONLY), GO TO GH13c/LW009_3

LW008_3
Q9860

How much money did you leave in the old account to accumulate?

AMOUNT

DK
RF

LW009_3
Q4123

GH13c. How much is in that account now?

[IWER: DO NOT PROBE DK/RF]

AMOUNT

DK
RF

GO TO LW013_3 BRANCHPOINT

LW010_3 - LW012_3 Unfolding Sequence

Question text: Does it amount to less than $____ , more than $____ , or what?

PROCEDURE: 2Up1Down

BREAKPOINTS: $5,000, $20,000, $50,000, $150,000
ENTRY POINT: $20,000

LW013_3 BRANCHPOINT: IF R DID NOT REPORT THAT MONEY IN PENSION ACCOUNT WAS CONVERTED TO AN ANNUITY (GH13b/LW006_3 NOT 4), GO TO LW018_3 BRANCHPOINT

IF MONEY IN PENSION ACCOUNT WAS CONVERTED TO AN ANNUITY ONLY (GH13b/LW006_3=4 ONLY), GO TO GH13d/LW014_3
How much did you convert to annuity?

______________
AMOUNT

How old were you when you started receiving the benefits from that annuity?

______________
AGE

How much are the benefits per month or year?

______________
AMOUNT

GO TO GH14/LW018_3 BRANCHPOINT

Was that per month or year?

PER:

04. MONTH 06. YEAR 97. OTHER (SPECIFY) 98. DK 99. RF

LW018_3 BRANCHPOINT: IF R DID NOT REPORT THAT MONEY IN PENSION ACCOUNT WAS ROLLED OVER INTO AN IRA (GH13b/LW006_3 NOT 2) or THAT WAS ONLY RESPONSE (GH13b/LW006_3=2 ONLY), GO TO LW019_3 BRANCHPOINT
LW019_3
Q9862
How much did the rollover amount to?

______________________________

AMOUNT

LW019_3
Q9863
How much did the transfer amount to?

______________________________

AMOUNT

GH14/LW021_3 BRANCHPOINT: IF PLAN IS TYPE B ONLY (GH13/LW001_3=2), GO TO GH20/LW042_3

LW022_3
Q4133
GH14. IF R’s PLAN IS BOTH TYPE A AND TYPE B (GH13/LW001_3=3):
Now about the part of the plan where benefits are based on a formula.

ASK OF ALL:
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?

[IWER: DO NOT PROBE BUT CHOOSE ALL THAT APPLY AND ASK ALL APPROPRIATE FOLLOW-UP QUESTIONS]

1. EXPECT FUTURE BENEFITS
2. RECEIVING BENEFITS NOW
3. RECEIVED CASH SETTLEMENT
4. ROLLED OVER INTO IRA
6. LOST BENEFITS
7. OTHER (SPECIFY)

LW023_3
GH14a/LW023_3 BRANCHPOINT: IF R DID NOT REPORT THAT RECEIVES BENEFITS NOW (GH14/LW021_3 NOT 2), GO TO GH14e/LW030_3 BRANCHPOINT
GH14a. In what month and year did you start to receive these benefits?

GH14a. 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

GH14Y1a. YEAR

GH14b. How much are the benefits per month or year?

[IWER: DO NOT PROBE DK/RF]

AMOUNT

0  DK  RF

GO TO GH14Y2b/LW026_3  GO TO GH14c/LW028_3

J116_3 - J118_3 Unfolding Sequence
Question text: Do they amount to less than $____ per month, more than $____ per month, or what?

PROCEDURE: 2Up1Down
BREAKPOINTS: $200, $400, $1,200, $1,600
ENTRY POINT: $400

GH14Y2b/LW026_3 BRANCHPOINT: GO TO GH14c/LW028_3

GH14Y2b. [IWER: PROBE IF NECESSARY]

Was that per month or year?

PER:

04. MONTH  06. YEAR  97. OTHER (SPECIFY)  98. DK  99. RF

GH14c. Are the benefits adjusted for changes in the cost of living?
GH14d. Have they ever been adjusted for changes in the cost of living?

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

GH14e/LW030_3 BRANCHPOINT: IF R DID NOT REPORT THAT RECEIVED CASH SETTLEMENT (GH14/LW021_3 NOT 3), GO TO GH14g/LW033_3 BRANCHPOINT

GH14e. How much did the cash settlement amount to?

[IWER: DO NOT PROBE DK/RF]  

AMOUNT  

GO TO  
GH14f/LW031_3

J123_3 - J125_3 Unfolding Sequence
Question text: Did it amount to a total of less than $____, more than $____, or what?

PROCEDURE: 2Up1Down  
BREAKPOINTS: $2,000, $6,000, $60,000, $250,000  
ENTRY POINT: $6,000
**LW031_3**

**Q4142**

GH14f. What did you do with the money?

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. BOUGHT DURABLES</td>
<td>2. SPENT IT</td>
</tr>
<tr>
<td>3. SAVED/INVESTED</td>
<td>4. PAID OFF DEBT</td>
</tr>
<tr>
<td>5. ROLLED INTO IRA</td>
<td>7. OTHER (SPECIFY)</td>
</tr>
<tr>
<td>8. DK</td>
<td>9. RF</td>
</tr>
</tbody>
</table>

**LW032_3**

**GH14g/LW033_3 BRANCHPOINT: IF R DID NOT REPORT THAT ROLLED PENSION OVER INTO IRA (GH14/LW021_3 NOT 4), GO TO GH15/LW034_3 BRANCHPOINT**

**LW033_3**

**Q4143**

GH14g. How much did the rollover amount to?

**IRA ROLLOVER**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>AMOUNT</td>
<td>DK</td>
</tr>
</tbody>
</table>

**GH15/LW034_3 BRANCHPOINT: IF R DID NOT REPORT THAT EXPECTS FUTURE BENEFITS (GH14/LW021_3 NOT 1), GO TO GH20/LW042_3**

**LW034_3**

**Q4144**

GH15. How many years altogether were you included in this plan?

[IWER: INCLUDE YEARS WITH OTHER EMPLOYERS IF SAME PLAN]

[IWER: ROUND THE VALUE TO THE NEAREST YEAR]

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>YEARS</td>
<td>DK</td>
</tr>
</tbody>
</table>

**GH16/LW035_3 BRANCHPOINT: IF THIS IS A PROXY INTERVIEW (CS1A/A009={2 or 3}), GO TO GH20/LW042_3**
GH16. At what age do you expect to start receiving (the rest of your) benefits from this plan?

40-94 AGE

96 ALREADY RECEIVING ALL BENEFITS

DK

RF

GO BACK TO GH14/LW021_3 AND CHANGE RESPONSE TO RECEIVING BENEFITS NOW (GH14/LW021_3=2)

GO TO GH20/LW042_3

GH17. About how much do you expect these benefits to be, either as a percent 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 GH17b/LW038_3

GO TO GH17d/LW041_3

GO TO GH20/LW042_3

GH17a. [IWER: ENTER THE PERCENT OF FINAL PAY]

PERCENT

DK

RF

GO TO GH20/LW042_3
GH17b. [IWER: PROBE IF NECESSARY]
How much do you expect to receive?

[IWER: DO NOT PROBE DK/RF]

<table>
<thead>
<tr>
<th>AMOUNT</th>
<th>0</th>
<th>DK</th>
<th>RF</th>
</tr>
</thead>
</table>

AMOUNT

GO TO GH17c/LW039_3

GO TO GH20/LW042_3

J133_3 - J135_3 Unfolding Sequence
Question text: Do you expect a total of less than $____ per year, more than $____ per year, or what?

PROCEDURE: 2Up1Down
BREAKPOINTS: $500, $1,000, $2,000, $3,000
ENTRY POINT: $1,000

GH17c/LW039_3 BRANCHPOINT: GO TO GH20/LW042_3

GH17c. [IWER: PROBE IF NECESSARY]
Was that per month or year?

PER:

PER:

4. MONTH 6. YEAR 97. OTHER (SPECIFY) 98. DK 99. RF

GH17d/LW041_3 BRANCHPOINT: GO TO GH20/LW042_3

GH17d. [IWER: ENTER LUMP SUM AMOUNT]

<table>
<thead>
<tr>
<th>AMOUNT</th>
<th>8. DK</th>
<th>9. RF</th>
</tr>
</thead>
</table>

AMOUNT

GO TO GH20/LW042_3
GH20. What is the earliest age at which you could have left that job and begun to receive pension benefits from this plan?

95. NO AGE REQUIREMENT

**END OF GH13/LW001_3 LOOP: IF THERE ARE MORE PENSION PLANS GIVEN AT GH12a/L028, REPEAT QUESTIONS GH13/LW001_3 THROUGH GH20/LW042_3 FOR UP TO FOUR PENSION PLANS IF R REPORTED HAVING MORE THAN ONE PLAN AT GH12a/L028 (GH12a/L028={(2-8)}) OR FOR TWO PLANS IF R REPORTED HAVING MORE THAN ONE PLAN AT (GH12b/L029) ((GH12b/L029)=3). IF NOT, CONTINUE ON TO GH21/LW158_4 BRANCHPOINT.***

END OF PENSION BLOCK-3:
(GH13/LW001_3 — GH20/LW042_3)
BEGINNING OF EMPLOYER INFORMATION BLOCK-4:
(GH21/LW158_4 — GH21f/LW165_4)

NOTE: THE FOLLOWING SERIES OF EMPLOYER NAME AND ADDRESS QUESTIONS
(GH21/LW158_4 THROUGH GH21f/LW165_4) IS A REPLICATE OF THAT APPEARING
IN SECTION J (G39/JW158_1 — G40e/JW165_1) AND IS KNOWN AS THE SECTION
J EMPLOYER NAME BLOCK.

GH21. IWER: READ TO ALL RESPONDENTS:

We would like to obtain complete information about fringe benefits for
employees like you. In order to do this, we need the full name and
address of that employer.

IF R IS STILL WORKING (J023=96):
For whom do you work on your main job?

OTHERWISE:
For whom do you work now?

NOTE: THE TEXT FOR THIS QUESTION SHOULD HAVE BEEN:
For whom did you work at that job?

(What is the [company's/organization's] name?)

COMPANY NAME

GO TO GH23/L031 BRANCHPOINT

GH21a. What is the address of the place where you worked?

[IWER: PROBE IF NECESSARY]
I will need the mailing address, city, state, and zip code.

ADDRESS 1

GO TO GH21c/LW161_4

GO TO GH23/L031 BRANCHPOINT

GH21b. ADDRESS 2
NOTE: THE IWER SELECTS FROM A MENU OF STATE NAMES, INCLUDING WASHINGTON, D.C., AND PUERTO RICO.

[IWER: DO NOT USE DASH IN PHONE NUMBER]

[IWER: ENTER 999 FOR UNKNOWN AREA CODE OR NUMBER]

END OF EMPLOYER INFORMATION BLOCK-4:
(GH21/LW158_4 — GH21f/LW165_4)

GH23/L031 BRANCHPOINT: IF R HAS HAD ONLY ONE OTHER JOB THAT HAS LASTED 5 YEARS OR MORE (GH2/L006=1), GO TO (GH42)/L039
 Besides the jobs you have already told me about, have you worked for any other employer including self-employment where you were included in a pension or retirement plan, or in a tax-deferred savings plan of some sort?

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

GO TO (GH42)/L039

 How many such employers have you worked for?

(Besides the ones you have already told me about.)

[IWER: WHERE R WAS INCLUDED IN A PENSION OR RETIREMENT PLAN]

DK  RF

NUMBER OF EMPLOYERS

***BEGINNING OF GH25/L034 LOOP: REPEAT GH25/L034 THROUGH GH32c/W041_4 FOR FIRST AND SECOND EMPLOYERS MENTIONED.***

 When did you start working for [that/the first such/the next such] employer?

DK  RF

YEAR

 And when did you leave?

DK  RF

YEAR
L036
Q4178
GH27. How much were you earning when you left?

[IWER: IF R REPORTS A 'PER HOUR' AMOUNT, BE SURE TO RECORD CENTS IF APPLICABLE]

[IWER: USE ZERO FOR NONE]

<table>
<thead>
<tr>
<th>AMOUNT</th>
<th>0</th>
<th>DK</th>
<th>RF</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

GO TO GH28/LW001_4

L037
Q4179
GH27Y1. [IWER: PROBE IF NECESSARY]
Was that per hour, week, month, or year?

PER:

<table>
<thead>
<tr>
<th>01. HOUR</th>
<th>02. WEEK</th>
<th>03. EVERY TWO WEEKS/Bi-WEEKLY</th>
<th>04. MONTH</th>
<th>05. TWICE A MONTH</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>06. YEAR</td>
<td>97. OTHER (SPECIFY)</td>
<td>98. DK</td>
<td>99. RF</td>
<td></td>
</tr>
</tbody>
</table>

L038
BEGINNING OF PENSION BLOCK-4
(GH28/LW001_4 — GH32c/LW041_4)

NOTE: THE FOLLOWING SERIES OF PENSION QUESTIONS (GH28/LW001_4 THROUGH GH32c/LW041_4) IS A REPLICATE OF THAT APPEARING IN SECTION J (G31/J088/JW001_1 — G35d/J138/JW041_1) AND IS KNOWN AS THE SECTION J PENSION BLOCK.

LW001_4
Q4181
GH28. I would like to know about the type of the most important pension or retirement plan you had.

READ TO ALL Rs ON THE FIRST LOOP:
In some retirement plans, call them Type A, benefits are usually based on a formula involving age, years of service, and salary. In other plans, call them Type B, money is accumulated in an account for you.

NOTE: IF R HAS ALREADY BEEN THROUGH THE LOOP ONCE, THE EXPLANATION, ABOVE, APPEARS IN PARENTHESES AND IS READ AT THE IWER’s DISCRETION.

Was your plan Type A or Type B?

DEFINITION: 401-K, 403-B, ESOP, SRA, THRIFT/SAVINGS, STOCK/PROFIT-SHARING, MONEY PURCHASE PLANS, AND CASH BALANCE PLANS ARE ALL TYPE B RETIREMENT PLANS.
TYPE A PLANS ARE OFTEN CALLED "DEFINED BENEFIT" PLANS.
TYPE B PLANS ARE OFTEN CALLED "DEFINED CONTRIBUTION."

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

GO TO GH29/LW021_4
GO TO (GH42)/L039
(OUT OF GH28/LW001_4 LOOP)
GH28a. IF R HAS BOTH TYPES OF PLAN (GH28/LW001_4=3):
For the part of your pension where money is accumulated in an account, how much money was in your account when you left that job?

OTHERWISE:
How much money was in your account when you left that job?

[IWER: DO NOT PROBE DK/RF]

AMOUNT

<table>
<thead>
<tr>
<th>DK</th>
<th>RF</th>
</tr>
</thead>
</table>

GO TO GH28b/LW006_4

J090/LW003_4 - J092/LW005_4 Unfolding Sequence
Question text: Did it amount to less than $____, more than $____, or what?

PROCEDURE: 2Up1Down
BREAKPOINTS: $5,000, $20,000, $50,000, $150,000
ENTRY POINT: $20,000

GH28b. When you left that job, did you withdraw the money, roll it over into an IRA, leave it to accumulate in the old plan, convert it to an annuity, or what?

[IWER: DO NOT PROBE, BUT CHOOSE ALL THAT APPLY AND ASK ALL APPROPRIATE FOLLOW-UP QUESTIONS]

1. WITHDREW THE MONEY
2. ROLLED OVER INTO IRA
3. LEFT TO ACCUMULATE
4. CONVERT TO ANNUITY
5. TRANSFERRED TO NEW EMPLOYER
6. LOST BENEFITS
7. OTHER (SPECIFY)
8. DK
9. RF

LW008_4 BRANCHPOINT: IF R DID NOT REPORT THAT MONEY WAS LEFT TO ACCUMULATE IN PENSION ACCOUNT (GH28b/LW006_4 NOT 3), GO TO LW013_4 BRANCHPOINT

IF MONEY IN PENSION ACCOUNT WAS LEFT TO ACCUMULATE ONLY (GH28b/LW006_4=3 ONLY), GO TO GH13c/LW009_4

LW008_4
How much money did you leave in the old account to accumulate?

| DK | RF |
GH28c. How much is in that account now?

[IWER: DO NOT PROBE DK/RF]

<table>
<thead>
<tr>
<th>AMOUNT</th>
<th>DK</th>
<th>RF</th>
</tr>
</thead>
</table>

GO TO LW013_4

BRANCHPOINT

J097/LW010_4 - J099/LW012_4 Unfolding Sequence

Question text: Does it amount to less than $____, more than $____, or what?

PROCEDURE: 2Up1Down

BREAKPOINTS: $5,000, $20,000, $50,000, $150,000
ENTRY POINT: $20,000

LW013_4 BRANCHPOINT: IF R DID NOT REPORT THAT MONEY IN PENSION ACCOUNT WAS CONVERTED TO AN ANNUITY (GH28b/LW006_4 NOT 4), GO TO LW018_4 BRANCHPOINT

IF MONEY IN PENSION ACCOUNT WAS CONVERTED TO AN ANNUITY ONLY (GH28b/LW006_4=4 ONLY), GO TO GH28d/LW014_4

LW013_4

How much did you convert to annuity?

<table>
<thead>
<tr>
<th>AMOUNT</th>
<th>DK</th>
<th>RF</th>
</tr>
</thead>
</table>

Q9861
GH28d. How old were you when you started receiving the benefits from that annuity?

[IWER: IF R INDICATES BENEFITS HAVE NOT YET STARTED, ASK AT WHAT AGE THEY WILL BEGIN, AND NOTE THIS IN COMMENT BOX]

__________________________  DK  RF
AGE

GH28e. How much are the benefits per month or year?

[IWER: IF BENEFITS HAVE NOT YET STARTED, RECORD WHAT BENEFITS WILL BE]

__________________________  0  DK  RF
AMOUNT  GO TO LW018_4 BRANCHPOINT

GH28f. [IWER: PROBE IF NECESSARY]
Was that per month or year?

PER:

04. MONTH  06. YEAR  97. OTHER (SPECIFY)  98. DK  99. RF  LW017_4

LW018_4 BRANCHPOINT: IF R DID NOT REPORT THAT MONEY IN PENSION ACCOUNT WAS ROLLED OVER INTO AN IRA (GH28b/LW006_4 NOT 2) or THAT WAS ONLY RESPONSE (GH28b/LW006_4=2 ONLY), GO TO LW019_4 BRANCHPOINT

LW019_4
Q9862
How much did the rollover amount to?

__________________________  DK  RF
AMOUNT

LW019_4 BRANCHPOINT: IF R DID NOT REPORT THAT MONEY IN PENSION ACCOUNT WAS TRANSFERRED TO NEW EMPLOYER (GH28b/LW006_4 NOT 5) or THAT WAS ONLY RESPONSE (GH28b/LW006_4=5 ONLY), GO TO GH29/LW021_4 BRANCHPOINT

LW019_4
Q9863
How much did the transfer amount to?
GH29/LW021_4 BRANCHPOINT: IF PLAN IS TYPE B ONLY (GH28/LW001_4=2), GO TO END OF GH25/L034 LOOP (AFTER GH32c/LW041_4)

LW021_4
Q4190
GH29. IF R’s PLAN IS BOTH TYPE A AND TYPE B (GH28/LW001_4):
Now about the part of your pension where benefits are based on a formula.

ASK OF ALL:
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?

[IWER: DO NOT PROBE BUT CHOOSE ALL THAT APPLY AND ASK ALL APPROPRIATE FOLLOW-UP QUESTIONS]

1. EXPECT FUTURE BENEFITS
2. RECEIVING BENEFITS NOW
3. RECEIVED CASH SETTLEMENT
4. ROLLED OVER INTO IRA
5. LOST BENEFITS
6. OTHER (SPECIFY)
7. DK
8. RF

GH29a/LW023_4 BRANCHPOINT: IF R DID NOT REPORT THAT RECEIVES BENEFITS NOW (GH29/LW021_4 NOT 2), GO TO GH29e/LW030_4 BRANCHPOINT
GH29a. In what month and year did you start to receive these benefits?

GH29b. How much are the benefits per month or year?

[OVER: DO NOT PROBE DK/RF]

J116_4 - J118_4 Unfolding Sequence
Question text: Does it amount to less than $____ per month, more than $____ per month, or what?

PROCEDURE: 2Up1Down
BREAKPOINTS: $200, $400, $1,200, $1,600
ENTRY POINT: $400

GH29Y1b/LW026_4 BRANCHPOINT: GO TO GH29c/LW028_4

GH29c. Are the benefits adjusted for changes in the cost of living?
LW029_4  
Q4197  
GH29d. Have they ever been adjusted for changes in the cost of living?  

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

GH29e/LW030_4 BRANCHPOINT: IF R DID NOT REPORT THAT RECEIVED CASH SETTLEMENT (GH29/LW021_4 NOT 3), GO TO GH29g/LW033_4 BRANCHPOINT

LW030_4  
Q4198  
GH29e. How much did the cash settlement amount to?  

[IWER: DO NOT PROBE DK/RF]  

[ ]  

AMOUNT  

DK  RF

GO TO  
GH29f/LW031_4

J123_4 - J125_4 Unfolding Sequence  
Question text: Did it amount to a total of less than $____ , more than $____ , or what?  

PROCEDURE: 2Up1Down  
BREAKPOINTS: $2,000, $6,000, $60,000, $250,000  
ENTRY POINT: $6,000
Q4199
GH29f. 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)  
8. DK  
9. RF  

GH29g/LW033_4 BRANCHPOINT: IF R DID NOT REPORT THAT ROLLED PENSION OVER INTO IRA (GH29/LW021_4 NOT 4), GO TO GH30/LW034_4 BRANCHPOINT

Q4200
GH29g. How much did the rollover amount to?

IRA ROLLOVER  

DK  
RF  

AMOUNT  

GH30/LW034_4 BRANCHPOINT: IF R DID NOT REPORT THAT IS EXPECTING FUTURE BENEFITS (GH29/LW021_4 NOT 1), GO TO END OF GH25/L034 LOOP (AFTER GH32c/LW041_4)

Q4201
GH30. How many years altogether were you included in this plan?

[IWER: INCLUDE YEARS WITH OTHER EMPLOYERS IF SAME PLAN]  
[IWER: ROUND THE VALUE TO THE NEAREST YEAR]  

YEARS  

GH31/LW035_4 BRANCHPOINT: IF THIS IS A PROXY INTERVIEW, GO TO END OF GH25/L034 LOOP (AFTER GH32c/LW041_4)
LW035_4
Q4202
GH31. At what age do you expect to start receiving (the rest of your) benefits from this plan?

40-94 AGE

---

96 ALREADY RECEIVING ALL BENEFITS

DK

RF

GO BACK TO GH29/LW021_4 AND CHANGE RESPONSE TO RECEIVING BENEFITS NOW (GH29/LW021_4=2)

GO TO END OF GH25/L034 LOOP (AFTER GH32c/LW041_4)

LW036_4
Q4203
GH32. About how much do you expect these benefits to be, either as a percent 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 GH32b/LW038_4

GO TO GH32c/LW041_4

GO TO END OF GH25/L034 LOOP (AFTER GH32c/LW041_4)

LW037_4
Q4204
GH32a. [IWER: ENTER THE PERCENT OF FINAL PAY]

---

PERCENT

DK

RF

GO TO END OF GH25/L034 LOOP (AFTER GH32c/LW041_4)
GH32b. [IWER: PROBE IF NECESSARY]
How much do you expect to receive?

[IWER: DO NOT PROBE DK/RF]

---

GH32b1/LW039_4

J133_4 - J135_4 Unfolding Sequence
Question text: Does it amount to less than $____ per month, more than $____ per month, or what?

PROCEDURE: 2Up1Down
BREAKPOINTS: $500, $1,000, $2,000, $3,000
ENTRY POINT: $1,000

GH32b1/LW039_4 BRANCHPOINT: GO TO END OF GH25/L034 LOOP (AFTER GH32c/LW041_4)

LW039_4
Q4206
GH32b. [IWER: PROBE IF NECESSARY]
Was that per month or year?

PER:

4. MONTH 6. YEAR 97. OTHER (SPECIFY) 98. DK 99. RF

GH32c/LW041_4 BRANCHPOINT: GO TO END OF GH25/L034 LOOP (AFTER GH32c/LW041_4)

LW041_4
J157
Q4208
GH32c. [IWER: ENTER LUMP SUM AMOUNT]
Q8257
(GH42) Counting paid vacations as weeks of work, how many weeks did you work in the last 12 months?

[IWER: COUNT PAID SICK TIME AS WORK TIME]

NUMBER OF WEEKS

L040
Q4220
GH43. 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 GH52Y4/L068

L041
Q4221
GH44. How many times has this happened?

8. DK  9. RF

GO TO GH52Y4/L068
***BEGINNING OF GH45/L043 LOOP: REPEAT GH45/L043 THROUGH GH51/L063 FOR FIRST AND SECOND EARLY-OUT WINDOWS.***

L043
Q4223
GH45. When was the [first/last] special incentive offered?

[DK] [RF]

YEAR

L044
Q4224
GH46. Which employer were you working for at the time?

[IWER: ENTER FULL EMPLOYER NAME]

[DK] [RF]

EMPLOYER

L045
Q4225
GH47. Was the special incentive a cash bonus, improved pension benefits, or what?

[IWER: ENTER ALL THAT APPLY]

1. CASH BONUS
2. IMPROVED PENSION BENEFITS
3. PERMANENT MEDICAL INSURANCE
4. TEMPORARY MEDICAL INSURANCE
5. TEMPORARY CASH BENEFIT
6. ADDITIONAL YEARS OF SERVICE CREDITED
7. OTHER (SPECIFY)

[DK] [RF]

L045

GH48/L047 BRANCHPOINT: IF R DID NOT REPORT THAT WAS OFFERED CASH BONUS (GH47/L045 NOT 1), GO TO GH48aa/L048 BRANCHPOINT

L047
Q4226
GH48. How much did the cash bonus offer amount to?

[IWER: USE ZERO FOR NONE]

[DK] [RF]

AMOUNT

GH48aa/L048 BRANCHPOINT: IF R DID NOT REPORT THAT WAS OFFERED IMPROVED PENSION BENEFITS (GH47/L045 NOT 2), GO TO GH48a1/L051 BRANCHPOINT
L048
Q4227
GH48aa. How much did the extra pension benefits offer amount to?

<table>
<thead>
<tr>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
</tr>
<tr>
<td>DK</td>
</tr>
<tr>
<td>RF</td>
</tr>
</tbody>
</table>

GO TO GH48a1/L051 BRANCHPOINT

L049
Q4228
GH48ab. [IWER: PROBE IF NECESSARY]
Was that per week, month, or year?

PER:

<table>
<thead>
<tr>
<th>PER:</th>
</tr>
</thead>
<tbody>
<tr>
<td>02. WEEK</td>
</tr>
<tr>
<td>04. MONTH</td>
</tr>
<tr>
<td>06. YEAR</td>
</tr>
<tr>
<td>95. LUMP SUM</td>
</tr>
<tr>
<td>97. OTHER (SPECIFY)</td>
</tr>
<tr>
<td>98. DK</td>
</tr>
<tr>
<td>99. RF</td>
</tr>
</tbody>
</table>

L050

GH48a1/L051 BRANCHPOINT: IF R DID NOT REPORT THAT WAS OFFERED TEMPORARY MEDICAL INSURANCE (GH47/L045 NOT 4), GO TO GH48b/L054 BRANCHPOINT

L051
Q4230
GH48a1. Until what age was the temporary medical insurance offered?

<table>
<thead>
<tr>
<th>AGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>95. NUMBER OF YEARS GIVEN</td>
</tr>
<tr>
<td>96. ANSWERED YEAR</td>
</tr>
<tr>
<td>DK</td>
</tr>
<tr>
<td>RF</td>
</tr>
</tbody>
</table>

GO TO GH48b/L054 BRANCHPOINT
GO TO GH48a3/L053
GO TO GH48b/L054 BRANCHPOINT
GH48a2. [IWER: PROBE IF NECESSARY] 
For how many years was the temporary medical insurance offered? 

1 — 25 YEARS

YEARS

GO TO GH48b/L054 BRANCHPOINT

GH48a3. [IWER: PROBE IF NECESSARY] 
Until which year did you receive the temporary medical insurance? 

YEAR

GH48b/L054 BRANCHPOINT: IF R DID NOT REPORT THAT WAS OFFERED A TEMPORARY CASH BENEFIT (GH47/L045 NOT 5), GO TO GH48e/L059 BRANCHPOINT

L054 
Q4233 
GH48b. How much did the temporary cash benefits amount to? 

[IWER: USE ZERO FOR NONE]

AMOUNT

GO TO GH48c/L056

L055 
Q4234 
GH48Y1b. [IWER: PROBE IF NECESSARY] 
Was that per month or year? 

PER:

02. WEEK 04. MONTH 06. YEAR 95. LUMP SUM

97. OTHER (SPECIFY) 98. DK 99. RF

L056 
Q4236 
GH48c. Until what age was the temporary cash benefit offered?
GO TO GH48d2/L058
BRANCHPOINT: IF R DID NOT GIVE THE YEAR THAT WAS OFFERED A TEMPORARY
CASH BENEFIT (GH48c/L056 NOT 96), GO TO GH48e/L059
BRANCHPOINT

GH48d2/L058

GH48e/L059

GH48e/L060

GH48f/L061
[IWER: USE ZERO FOR NONE]

AMOUNT

L061
Q4241
GH49. Did you accept the incentive and leave that employer?

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

GO TO GH51/L063

L062
Q4242
GH50. Was the special incentive important in your decision, or would you probably have left at about that time anyway?

1. IMPORTANT IN MY DECISION  5. I WOULD HAVE LEFT ANYWAY  8. DK  9. RF

GO TO END OF LOOP (AFTER GH51/L063)

L063
Q4243
GH51. If you had been offered twice as much (to leave) at that time, would you have done so?

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

***END OF GH45/L043 LOOP: REPEAT GH45/L043 THROUGH GH51/L063 FOR SECOND EARLY-OUT WINDOW, IF APPLICABLE. IF NOT, CONTINUE ON TO GH52Y4/L068.***
L068
Q4264
GH52Y4. We need a little information about jobs you might have held years ago.

In what year did you first work for six months or more?

[IWER: USE 9995 FOR NEVER]

YEAR

GO TO GH54/L092 (GH ASSIST)

GH52ac/L072 BRANCHPOINT: IF YEAR R STARTED FIRST (6 MONTHS OR MORE) JOB (AS REPORTED AT GH52Y4/L068) WAS NO EARLIER THAN THE Earliest START DATE AMONG REPORTED JOBS IN J, K OR L, GO TO GH52d/L077

L072
Q4269
GH52ac. (Based on questions we've asked you so far, we have a good idea of your employment history since YEAR STARTED Earliest JOB REPORTED IN SECTION J, K OR L (L094EarliestJob). The next question refers to the period between YEAR STARTED FIRST JOB (per GH52Y4/L068) and YEAR STARTED Earliest JOB REPORTED IN SECTION J, K OR L (L094EarliestJob).

During how many of these years did you work six months or more?)

[IWER: PRESS [ENTER] FOR OTHER CHOICES]

2. ALL YEARS BETWEEN FIRST JOB (GH52Y4/L068) AND Earliest JOB REPORTED IN SECTION J, K OR L (L094EarliestJob)

GO TO GH52bc/L076 BRANCHPOINT

OR

L071
Q4268
GH52ab. [IWER: IF R GIVES NUMBER OF YEARS, ENTER THE NUMBER ON THIS SCREEN]

[IWER: PRESS [ENTER] FOR OTHER CHOICES]

NUMBER OF YEARS

GO TO GH52bc/L076 BRANCHPOINT

OR

L069
Q4266
GH52a. Based on questions we've asked you so far, we have a good idea of your employment history since YEAR STARTED EARLIEST JOB REPORTED IN SECTION J, K OR L (L094EarliestJob). The next question refers to the period between YEAR STARTED FIRST JOB (per GH52Y4/L068) and YEAR STARTED EARLIEST JOB REPORTED IN SECTION J, K OR L (L094EarliestJob).)

[IWER: IF R GIVES A RANGE OF YEARS OTHER THAN THE ABOVE RANGE, ENTER START YEAR ON THIS SCREEN]

[IWER: PRESS [ENTER] FOR OTHER CHOICES]

START YEAR

NO ENTRY

AND

L070
Q4267

GH52aa. [IWER: IF R GIVES A RANGE OF YEARS OTHER THAN THE ABOVE RANGE, ENTER END YEAR ON THIS SCREEN]

END YEAR

GH52bc/L076 BRANCHPOINT: IF R DID NOT SAY AT ANY OF GH52a/L069 THROUGH GH52ac/L072 {WHICH YEARS OR HOW MANY YEARS} THAT S/HE WORKED or R REPORTED THAT DID NOT WORK ANY YEARS (GH52ab/L071 WAS ANSWERED AS ZERO), GO TO GH52d/L077

L076
Q4274

GH52bc. (And during how many of these years did you work full time?)

[IWER: PRESS [ENTER] FOR OTHER CHOICES]

1. ALL OF THESE YEARS

2. ALL YEARS BETWEEN FIRST JOB (GH52Y4/L068) AND EARLIEST JOB REPORTED IN SECTION J, K OR L (L094EarliestJob)

8. DK
9. RF
NO ENTRY

GO TO GH52d/L077

OR

L075
Q4273

GH52bb. [IWER: IF R GIVES NUMBER OF YEARS, ENTER THE NUMBER ON THIS SCREEN]

[IWER: PRESS [ENTER] FOR OTHER CHOICES]
NUMBER OF YEARS

NO ENTRY

GO TO GH52d/L077

OR

L073
Q4271
GH52b. And during how many of these years did you work full time?

[IWER: IF R GIVES A RANGE OF YEARS, ENTER START YEAR ON THIS SCREEN]

[IWER: PRESS [ENTER] FOR OTHER CHOICES]

NO ENTRY

START YEAR

NO ENTRY

GO TO GH52d/L077

AND

L074
Q4272
GH52ba. [IWER: IF R GIVES A RANGE OF YEARS OTHER THAN THE ABOVE RANGE, ENTER END YEAR ON THIS SCREEN]

END YEAR

L077
Q4277
GH52d. (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

GO TO GH52f/L082

L078
Q4278
GH52e1. During what years were you employed by state or local governments?

FIRST EMPLOYMENT PERIOD

FROM                        TO

L078                        L079
Q4278                        Q4279
GH52e1. START YEAR          GH52e2. END YEAR
SECOND EMPLOYMENT PERIOD

[IWER: PRESS [ENTER] FOR NONE] (IF NONE, GO TO GH52f/L082)

FROM  
L080  
Q4280  
GH52e3. START YEAR
  
TO  
L081  
Q4281  
GH52e4. END YEAR

GH52f. Aside from military service, (remind me again,) have you ever been employed by the federal government?

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

GO TO GH52h/L087
During what years were you employed by the federal government?

<table>
<thead>
<tr>
<th>FIRST EMPLOYMENT PERIOD</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>FROM</td>
<td>TO</td>
</tr>
<tr>
<td>[L083] Q4283</td>
<td>[L084] Q4284</td>
</tr>
<tr>
<td>GH52g1. START YEAR</td>
<td>GH52g2. END YEAR</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SECOND EMPLOYMENT PERIOD</th>
</tr>
</thead>
<tbody>
<tr>
<td>[IWER: PRESS [ENTER] FOR NONE] (IF NONE, GO TO GH52h/L087)</td>
</tr>
<tr>
<td>FROM</td>
</tr>
<tr>
<td>[L085] Q4285</td>
</tr>
<tr>
<td>GH52g3. START YEAR</td>
</tr>
</tbody>
</table>

Some state and local government and certain other workers have not always been covered by Social Security.

Including the state, local, and federal jobs you just told me about and other jobs, did you ever work in a job where you did not pay social security taxes?

<table>
<thead>
<tr>
<th>1. YES</th>
<th>5. NO</th>
<th>8. DK</th>
<th>9. RF</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO GH54/L092 (L ASSIST)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
GH52i1. During what years were you first employed in a job where social security taxes were not paid?

**FIRST EMPLOYMENT PERIOD**

<table>
<thead>
<tr>
<th>FROM</th>
<th>TO</th>
</tr>
</thead>
<tbody>
<tr>
<td>L088</td>
<td>L089</td>
</tr>
<tr>
<td>Q4288</td>
<td>Q4289</td>
</tr>
</tbody>
</table>

GH52i1. START YEAR |

GH52i2. END YEAR

**SECOND EMPLOYMENT PERIOD**

[IWER: PRESS [ENTER] FOR NONE] (IF NONE, GO TO GH54/L092 (L ASSIST))

<table>
<thead>
<tr>
<th>FROM</th>
<th>TO</th>
</tr>
</thead>
<tbody>
<tr>
<td>L090</td>
<td>L091</td>
</tr>
<tr>
<td>Q4290</td>
<td>Q4291</td>
</tr>
</tbody>
</table>

GH52i3. START YEAR |

GH52i4. END YEAR

GH54. L ASSIST

IWER:

HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN SECTION L — JOB HISTORY?

<table>
<thead>
<tr>
<th>1. NEVER</th>
<th>2. A FEW TIMES</th>
<th>3. MOST OR ALL OF THE TIME</th>
<th>4. THE SECTION WAS DONE BY A PROXY REPORTER</th>
</tr>
</thead>
</table>

GO TO SECTION M