

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

MAJOR FLOW CONTROL, CONDITION AND FILL VARIABLES *

THIS IS A REINTERVIEW R (Z076=1);

THIS IS A NEW SPOUSE/PARTNER OF A REINTERVIEW R (Z076=0);

THIS IS A NEVER INTERVIEWED R or A NEW INTERVIEW R (Z076=5)

THIS IS A PROXY INTERVIEW (CS1A/A009={2 or 3}) or (A009 NOT 1);

THIS IS A SELF INTERVIEW (CS1A/A009=1)

R IS FROM {AHEAD or CODA} COHORT (X023={1 or 2})

R IS MARRIED (X065=1);

R IS PARTNERED (X065=3);

R IS SINGLE (X065=6)

R IS WORKING FOR PAY (G2/J020=1);

R IS NOT CURRENTLY WORKING (G2/J020=5)

* A variable fieldname and code reference is shown at its first occurrence in the questionnaire, but in some cases, especially when it is common, is not be shown after that.

GH1/L005 BRANCHPOINT: IF R NEVER WORKED FOR PAY (GG1/K003={5 or DK or RF}) or THIS IS A REINTERVIEW R (Z076=1), 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
<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="border: 1px solid black; padding: 5px; margin: 5px;">GO TO (GH42)/L039 BRANCHPOINT</div> </div>			

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
<div style="display: flex; justify-content: center; align-items: center;"> <div style="border: 1px solid black; padding: 5px; margin: 5px;">GO TO GH4/L009</div> </div>			

GH3a/L008 BRANCHPOINT: IF R IS FROM {AHEAD or CODA} COHORT (X023={1 or 2}), 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	_____	<input type="checkbox"/> DK	<input type="checkbox"/> RF
L009		L010		L011		
Q4096		Q4097		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 (X023={1 or 2}), 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 _____ OR _____ DK RF

L016 L017 L018
Q4104 Q4105 Q4106
GH7. YEAR GH7Y1. YEARS AGO GH7Y2. AT AGE

L020
Q4109

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

_____ DK RF

HOURS PER WEEK

L021
Q4110

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

_____ DK RF

NUMBER OF WEEKS

L022
Q4111

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

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

[IWER: IF AMOUNT PER HOUR, ENTER BOTH DOLLARS AND CENTS]

[IWER: USE ZERO FOR NONE]

_____	0	DK	RF
AMOUNT			
GO TO GH11/L025 BRANCHPOINT			

L023
Q4112

GH10Y1. [IWER: PROBE IF NECESSARY]

Was that per hour, week, month, or year?

PER:

1. HOUR	2. WEEK	3. EVERY TWO WEEKS/BI-WEEKLY	4. MONTH	5. TWICE A MONTH
6. YEAR	97. OTHER (SPECIFY) _____ L024		98. DK	99. RF

(GH10a)/L095 BRANCHPOINT: IF R IS FROM {AHEAD or CODA} COHORT (X023={1 or 2}), GO TO GH12/L027

L095

(GH10a) Were you covered on that job by a union or employee-association contract?

1. YES	5. NO	8. DK	9. RF
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L025
Q4114

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?)

[IWER: ENTER 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) _____ L026		99. RF

L027

Q4116

GH12. IF R IS SELF-EMPLOYED (GH3/L007=2):

Aside from IRAs not sponsored by your business 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 yourself?

OTHERWISE:

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?

1. YES	5. NO	8. DK	9. RF
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GH12a/L028 BRANCHPOINT: IF R IS FROM {AHEAD or CODA} COHORT (X023={1 or 2}), GO TO GH52Y4/L068

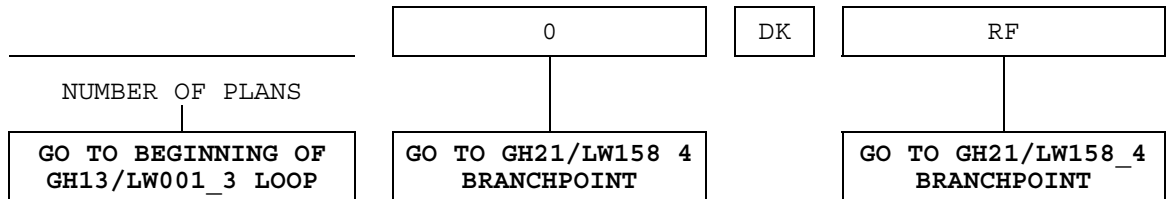
IF R DID NOT REPORT THAT WAS INCLUDED IN A PENSION PLAN (GH12/L027={5 or DK or RF}), GO TO GH23/L031 BRANCHPOINT

L028

Q4118

GH12a. In how many different pension plans were you included on this job?

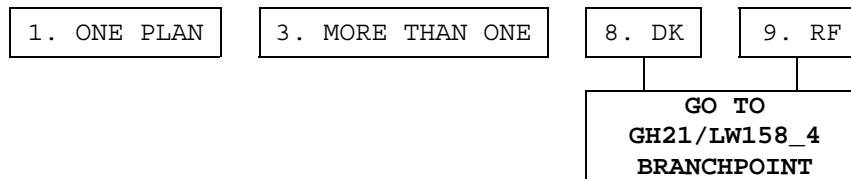
1 — 8 PLANS



L029

Q8256

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



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."

1. TYPE A

2. TYPE B

3. BOTH TYPES

8. DK

9. RF

GO TO
GH14/LW021_3

GO TO GH21/LW158 4
BRANCHPOINT
(OUT OF
GH13/LW001_3 LOOP)

NOTE: FROM LW002_3 ONWARDS, THROUGHOUT THE REMAINDER OF THE PENSION BLOCK, THE SCREEN DISPLAYS THE TYPE OF PLAN SELECTED AT LW001_3. THE SAME APPLIES IN THE LATER PENSION BLOCK BEGINNING AT LW001_4.

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]

	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, transfer it to a new employer, did you lose your benefits, 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) _____ LW007_3	8. DK
			9. RF

NOTE: A RESPONSE CODE OF "6. LOST BENEFITS" MAY NOT BE SELECTED WITH ANY OTHER RESPONSE.

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

LW009_3
Q4123

GH13c. How much is in that account now?

[IWER: DO NOT PROBE DK/RF]

AMOUNT

LW010_3 - LW012_3 Unfolding Sequence

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

PROCEDURE: 3Up

BREAKPOINTS: \$10,000, \$20,000, \$50,000, \$150,000

ENTRY POINT: \$10,000

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

LW013_3
Q9861

How much did you convert to an annuity?

AMOUNT

LW014_3
Q4128

GH13d. 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]

AGE

DK

RF

LW015_3
Q4129

GH13e. How much are the benefits from that annuity per month or year?

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

AMOUNT

0

DK

RF

GO TO (GH13fa)/LW049_3
 (AFTER JW017_3)

LW016_3
Q4130

GH13f. [IWER: PROBE IF NECESSARY]

Is that per month or year?

PER:

4. MONTH

6. YEAR

97. OTHER (SPECIFY)

 LW017_3

98. DK

99. RF

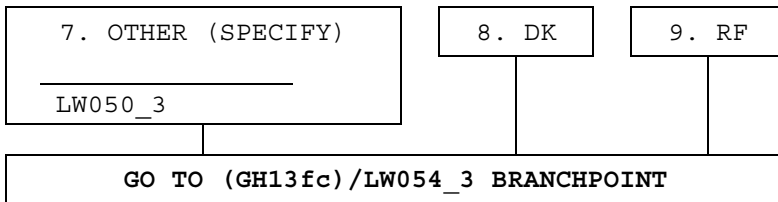
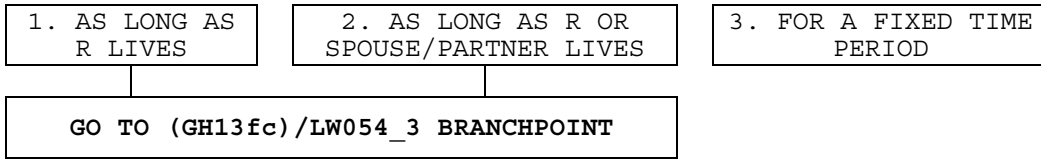
LW049_3

(GH13fa) IF R IS MARRIED/PARTNERED (X065={1 or 3}):

Will this payment continue only as long as you live, as long as either you or your [husband/wife/partner] live, is it for a fixed time period, or what?

OTHERWISE:

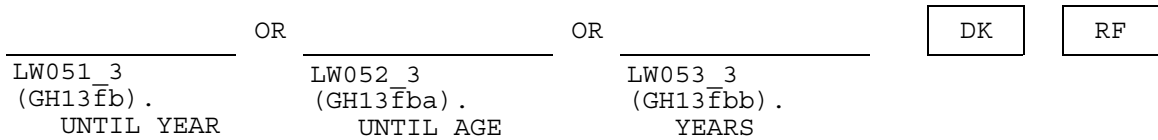
Will this payment continue as long as you live, is it for a fixed time period, or what?



NOTE: CODE 2 IS NOT SEEN FOR NON-COUPLED Rs.

LW051_3

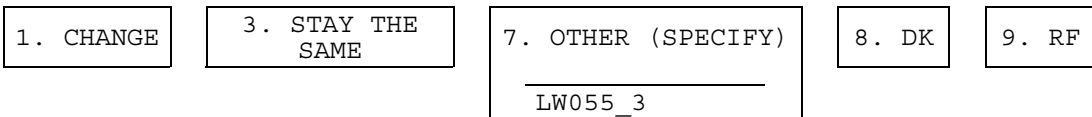
(GH13fb) What is that time period?



(GH13fc)/LW054_3 BRANCHPOINT: IF R IS NOT MARRIED/PARTNERED (X065 {NOT 1 and NOT 3}), GO TO LW018_3 BRANCHPOINT

LW054_3

(GH13fc) If you or your [husband/wife/partner] should die, will the income from the annuity change, stay the same, or what?



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

LW018_3
Q9862

How much did the rollover amount to?

AMOUNT

LW019 3 BRANCHPOINT: IF R DID NOT REPORT THAT MONEY IN PENSION ACCOUNT WAS TRANSFERRED TO NEW EMPLOYER (GH13b/LW006 3 NOT 5) or THAT WAS ONLY RESPONSE (GH13b/LW006_3=5 ONLY), GO TO W056_3 BRANCHPOINT

LW019_3
Q9863

How much did the transfer amount to?

AMOUNT

LW056_3 BRANCHPOINT: IF R DID NOT REPORT THAT WITHDREW THE MONEY (GH13b/LW006 3 NOT 1), GO TO GH14/LW021 3 BRANCHPOINT

IF R WITHDREW THE MONEY ONLY (GH13b/LW006 3=1 ONLY), GO TO LW057_3

LW056_3

How much money did you withdraw?

AMOUNT

LW057_3

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) _____ LW058_3	8. DK	9. RF

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

LW021_3
Q4133

GH14. IF R'S PLAN IS BOTH TYPE A AND TYPE B OR R DIDN'T KNOW
(GH13/LW001_3={3 or 8}):

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, did you roll over into an IRA, 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) LW022_3	8. DK	9. RF

NOTE: A RESPONSE CODE OF "6. LOST BENEFITS" MAY NOT BE SELECTED WITH ANY OTHER RESPONSE.

GH14a/LW023_3 BRANCHPOINT: IF R DID NOT REPORT THAT RECEIVES BENEFITS NOW (GH14/LW021_3 NOT 2), GO TO GH14e/LW030_3 BRANCHPOINT

LW023_3
Q4134

GH14a. In what month and year did you start to receive these benefits?

LW023_3
Q4134
GH14a. MONTH:

1. JAN	2. FEB	3. MAR	4. APR	5. MAY	6. JUN	7. JUL
8. AUG	9. SEP	10. OCT	11. NOV	12. DEC	98. DK	99. RF
		DK	RF			

LW024_3
Q4135
GH14Y1a. YEAR

LW025_3
Q4136

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

[IWER: DO NOT PROBE DK/RF]

	0	DK	RF
AMOUNT			
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

LW026_3
Q4137

GH14Y2b. [IWER: PROBE IF NECESSARY]
Is that per month or year?

PER:

4. MONTH	6. YEAR	97. OTHER (SPECIFY) _____ LW027_3	98. DK	99. RF
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LW028_3
Q4139

GH14c. Are the benefits adjusted for changes in the cost of living?

1. YES	5. NO	8. DK	9. RF
GO TO LW059_3			

LW029_3
Q4140

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

1. YES	5. NO	8. DK	9. RF
GO TO GH14e/LW030_3 BRANCHPOINT			

LW059_3

Are the benefits adjusted automatically?

- 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

LW030_3

Q4141

GH14e. How much did the cash settlement amount to?

[IWER: DO NOT PROBE DK/RF]

- _____
- 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?

- 1. BOUGHT DURABLES
- 2. SPENT IT
- 3. SAVED/INVESTED
- 4. PAID OFF DEBT

- 5. ROLLED INTO IRA
- 7. OTHER (SPECIFY)
- 8. DK
- 9. RF

LW032_3

[NOTE: THE IWER MAY CHOOSE AS MANY RESPONES AS APPLY.]

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

AMOUNT

DK	RF
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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]

YEARS

DK	RF
----	----

GH16/LW035_3 BRANCHPOINT: IF THIS IS A PROXY INTERVIEW (CS1A/A009={2 or 3}), GO TO GH20/LW042_3

LW035_3
Q4145

GH16. At what age do you expect to start receiving (the rest of your) benefits from this plan?

40-94 AGE

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	

LW036_3
Q4146

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	

LW037_3
Q4147

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

PERCENT	DK	RF
GO TO GH20/LW042_3		

LW038_3
Q4148

GH17b. [IWER: PROBE IF NECESSARY]
How much do you expect to receive?

[IWER: DO NOT PROBE DK/RF]

AMOUNT	0	DK	RF
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

LW039_3
Q4149

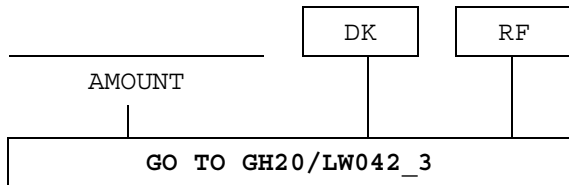
GH17c. [IWER: PROBE IF NECESSARY]
Is that per month or year?

PER:

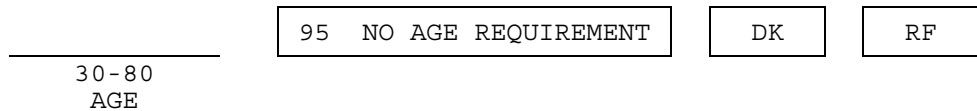
4. MONTH	6. YEAR	97. OTHER (SPECIFY) LW040_3	98. DK	99. RF
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GH17d/LW041_3 BRANCHPOINT: GO TO GH20/LW042_3

LW041_3
 Q4151
 GH17d. [IWER: ENTER LUMP SUM AMOUNT]



LW042_3
 Q4163
 GH20. What is the earliest age at which you could have left that job and begun to receive pension benefits from this plan?



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)

GH21/LW158 4 BRANCHPOINT: IF R WAS SELF-EMPLOYED (GH3/L007=2), GO TO GH23/L031 BRANCHPOINT

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.

LW158_4
Q4164

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 your last employer, the employer we were just talking about.

For whom did you work on that job?

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

COMPANY NAME

DK	RF
GO TO GH23/L031 BRANCHPOINT	

LW159_4
Q4165

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

[IWER: PROBE IF NECESSARY]

I will need the mailing address, city, state, and zip code.

	DK	RF

ADDRESS 1	GO TO GH21c/LW161_4	GO TO GH23/L031 BRANCHPOINT

	DK	RF

LW160_4 Q4166 GH21b. ADDRESS 2		

	DK	RF

LW161_4 Q4167 GH21c. CITY		GO TO GH23/L031 BRANCHPOINT

	97. OTHER COUNTRY (SPECIFY) _____ LW163_4	98. DK	99. RF

LW162_4 Q4168 GH21d. STATE			GH23/L031 BRANCHPOINT

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

	DK	RF

LW164_4 Q4169 GH21e. ZIP		

[IWER: DO NOT USE DASH IN PHONE NUMBER]

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

	DK	RF

LW165_4 Q4170 GH21f. PHONE 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 BRANCHPOINT

L031

Q4172

GH23. 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 BRANCHPOINT			

L032

Q4173

GH24. 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.

L034
Q4176

GH25. When did you start working for [that/the first such/the next such] employer?

YEAR

L035
Q4177

GH26. And when did you leave?

YEAR

L036
Q4178

GH27. How much were you earning when you left?

[IWER: IF AMOUNT PER HOUR, ENTER BOTH DOLLARS AND CENTS]

[IWER: USE ZERO FOR NONE]

AMOUNT

GO TO GH28/LW001_4

L037
Q4179

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

PER:

1. HOUR	2. WEEK	3. EVERY TWO WEEKS/BI-WEEKLY	4. MONTH	5. TWICE A MONTH
6. YEAR	97. OTHER (SPECIFY) _____ L038	98. DK	99. RF	

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
BRANCHPOINT
(OUT OF
GH28/LW001_4 LOOP)

LW002_4

Q4182

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]

_____	DK	RF
AMOUNT		
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

LW006_4

Q4183

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, transfer it to a new employer, did you lose your benefits, 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) _____ LW007_4	8. DK
			9. RF

NOTE: A RESPONSE CODE OF "6. LOST BENEFITS" MAY NOT BE SELECTED WITH ANY OTHER RESPONSE.

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
Q9860

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

AMOUNT

DK

RF

LW009_4
Q4184

GH28c. How much is in that account now?

[IWER: DO NOT PROBE DK/RF]

AMOUNT

DK

RF

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: 3Up

BREAKPOINTS: \$10,000, \$20,000, \$50,000, \$150,000

ENTRY POINT: \$10,000

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
Q9861

How much did you convert to an annuity?

AMOUNT

DK

RF

LW014_4
Q4185

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]

AGE

DK

RF

LW015_4
Q4186

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

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

AMOUNT

0

DK

RF

GO TO (GH28fa)/LW049_4
(AFTER JW017_4)

LW016_4
Q4187

GH28f. [IWER: PROBE IF NECESSARY]

Is that per month or year?

PER:

4. MONTH

6. YEAR

97. OTHER (SPECIFY)

 LW017_4

98. DK

99. RF

LW049_4

(GH28fa) IF R IS MARRIED/PARTNERED (X065={1 or 3}):
 Will this payment continue only as long as you live, as long as either you or your [husband/wife/partner] live, is it for a fixed time period, or what?

OTHERWISE:

Will this payment continue as long as you live, is it for a fixed time period, or what?

1. AS LONG AS R LIVES	2. AS LONG AS R OR SPOUSE/PARTNER LIVES	3. FOR A FIXED TIME PERIOD
GO TO (GH28fc)/LW054_4 BRANCHPOINT		

7. OTHER (SPECIFY) _____ LW050_4	8. DK	9. RF
GO TO (GH28fc)/LW054_4 BRANCHPOINT		

NOTE: CODE 2 IS NOT SEEN FOR NON-COUPLED Rs.

LW051_4

(GH28fb) What is that time period?

_____ LW051_4 (GH28fb). UNTIL YEAR	OR	_____ LW052_4 (GH28fba). UNTIL AGE	OR	_____ LW053_4 (GH28fbb). YEARS	<input type="checkbox"/> DK	<input type="checkbox"/> RF
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(GH28fc)/~~LWXX6_4~~/LW054_4 BRANCHPOINT: IF R IS NOT MARRIED/PARTNERED (X065 {NOT 1 and NOT 3}), GO TO LW018_4 BRANCHPOINT

LW054_4

(GH28fc) If you or your [husband/wife/partner] should die, will the income from the annuity change, stay the same, or what?

1. CHANGE	3. STAY THE SAME	7. OTHER (SPECIFY) _____ LW055_4	8. DK	9. RF
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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

LW018_4
Q9862

How much did the rollover amount to?

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 LW056_4 BRANCHPOINT

LW019_4
Q9863

How much did the transfer amount to?

AMOUNT

LW056_4 BRANCHPOINT: IF R DID NOT REPORT THAT WITHDREW THE MONEY (GH28b/LW006 4 NOT 1), GO TO GH29/LW021 4 BRANCHPOINT

IF R WITHDREW THE MONEY ONLY (GH28b/LW006 4=1 ONLY), GO TO LW057_4

LW056_4

How much money did you withdraw?

AMOUNT

LW057_4

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) _____ LW058_4	8. DK	9. RF

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 or R DIDN'T KNOW (GH28/LW001_4={3 or 8}):

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, did you roll over into an IRA, 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) LW022_4	8. DK	9. RF

NOTE: A RESPONSE CODE OF "6. LOST BENEFITS" MAY NOT BE SELECTED WITH ANY OTHER RESPONSE.

GH29a/LW023 4 BRANCHPOINT: IF R DID NOT REPORT THAT RECEIVES BENEFITS NOW (GH29/LW021_4 NOT 2), GO TO GH29e/LW030_4 BRANCHPOINT

LW023_4
Q4191

GH29a. In what month and year did you start to receive these benefits?

LW023_4
Q4191
GH29a. MONTH:

1. JAN	2. FEB	3. MAR	4. APR	5. MAY	6. JUN	7. JUL
8. AUG	9. SEP	10. OCT	11. NOV	12. DEC	98. DK	99. RF
		DK	RF			

LW024_4
Q4192
GH29Y1a. YEAR

LW025_4
Q4193

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

[IWER: DO NOT PROBE DK/RF]

	0	DK	RF
AMOUNT			
GO TO GH29Y1b/LW026_4	GO TO GH29c/LW028_4		

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

LW026_4
Q4194

GH29Y1b. [IWER: PROBE IF NECESSARY]
Is that per month or year?

PER:

4. MONTH	6. YEAR	97. OTHER (SPECIFY) _____ LW027_4	98. DK	99. RF
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LW028_4
Q4196

GH29c. Are the benefits adjusted for changes in the cost of living?

1. YES	5. NO	8. DK	9. RF
GO TO LW059_4			

LW029_4
Q4197

GH29d. Have they ever been adjusted for changes in the cost of living?

1. YES	5. NO	8. DK	9. RF
GO TO GH29e/LW030_4 BRANCHPOINT			

LW059_4

Are the benefits adjusted automatically?

- 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]

- _____
- DK
 - RF

AMOUNT

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

LW031_4

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)

LW032_4

8. DK

9. RF

NOTE: THE IWER MAY CHOOSE AS MANY RESPONES AS APPLY.

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

LW033_4
Q4200

GH29g. How much did the rollover amount to?

IRA ROLLOVER

AMOUNT

DK

RF

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)

LW034_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

DK

RF

GH31/LW035_4 BRANCHPOINT: IF THIS IS A PROXY INTERVIEW (CS1A/A009={2 or 3}), 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

AGE

96 ALREADY RECEIVING ALL BENEFITS

GO BACK TO GH29/LW021 4 AND CHANGE RESPONSE TO RECEIVING BENEFITS NOW (GH29/LW021_4=2)

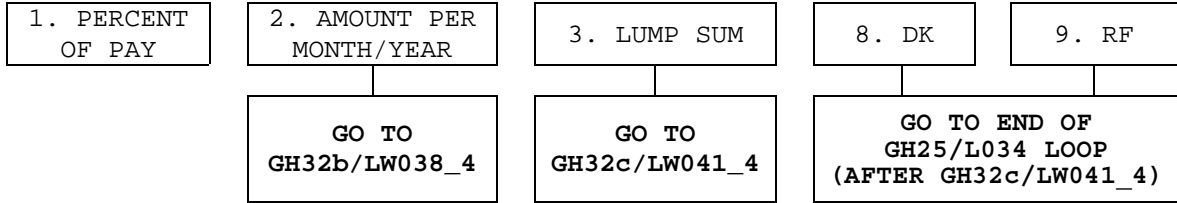
DK

RF

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

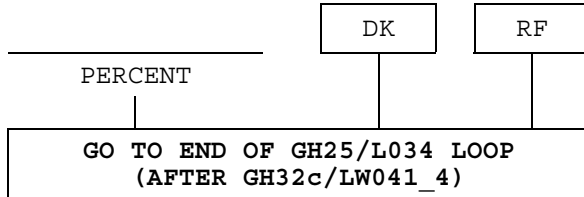
LW036_4
Q4203

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?



LW037_4
Q4204

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



LW038_4
Q4205

GH32b. [IWER: PROBE IF NECESSARY]
How much do you expect to receive?

[IWER: DO NOT PROBE DK/RF]

	0	DK	RF
AMOUNT			
GO TO GH32b1/LW039_4			
	GO TO END OF GH25/L034 LOOP (AFTER GH32c/LW041_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

GH32b1. [IWER: PROBE IF NECESSARY]
Is that per month or year?

PER:

4. MONTH	6. YEAR	97. OTHER (SPECIFY) _____ LW040_4	98. DK	99. RF
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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]

	DK	RF
AMOUNT		

END OF PENSION BLOCK-4

(GH28/LW001_4 — GH32c/LW041_4)

END OF GH25/L034 LOOP: REPEAT GH25/L034 THROUGH GH32c/LW041_4 FOR SECOND EMPLOYER, IF ANY. IF NOT, CONTINUE ON TO (GH42)/L039 BRANCHPOINT.

(GH42)/L039 BRANCHPOINT: IF R IS NOT CURRENTLY WORKING (G2/J020=5) and R LAST WORKED MORE THAN A YEAR AGO (per GG1a1/K004 or GG1a2/K005), GO TO GH43/L040

L039

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?

GO TO GH52Y4/L068

L041

Q4221

GH44. How many times has this happened?

NUMBER OF TIMES

GO TO GH52Y4/L068

BEGINNING OF GH45/L043 LOOP: REPEAT GH45/L043 THROUGH GH51/L063 FOR FIRST AND LAST SPECIAL INCENTIVE THE R RECEIVED.

L043
Q4223

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

YEAR

L044
Q4224

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

[IWER: ENTER FULL EMPLOYER NAME]

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) _____ L046	8. DK <input type="text" value="RF"/>

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]

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?

AMOUNT

0	DK	RF
---	----	----

GO TO GH48a1/L051 BRANCHPOINT

L049

Q4228

GH48ab. [IWER: PROBE IF NECESSARY]

Was that per week, month, or year?

PER:

2. WEEK	4. MONTH	6. YEAR	95. LUMP SUM
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97. OTHER (SPECIFY) _____ L050	98. DK	99. RF
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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?

35 — 80 AGE

AGE

95 NUMBER OF YEARS GIVEN	96 ANSWERED YEAR	DK	RF
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GO TO GH48b/L054 BRANCHPOINT

GO TO GH48a3/L053

GO TO GH48b/L054 BRANCHPOINT

L052

Q4231

GH48a2. [IWER: PROBE IF NECESSARY:]

For how many years was the temporary medical insurance offered?

1 — 25 YEARS

YEARS

DK	RF
----	----

GO TO GH48b/L054 BRANCHPOINT

L053
Q4232

GH48a3. [IWER: PROBE IF NECESSARY:]

Until which year was the temporary medical insurance offered?

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:

L056
Q4236

GH48c. Until what age was the temporary cash benefit offered?

35 — 80 AGE

AGE

L057

Q4237

GH48d1. [IWER: PROBE IF NECESSARY]

For how many years was the temporary cash benefit offered?

0 — 25 YEARS

YEARS

DK

RF

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

L058

Q4238

GH48d2. [IWER: PROBE IF NECESSARY]

Until which year was the temporary cash benefit offered?

YEAR

DK

RF

NOTE: RANGE IS 1900 TO (CURRENT YEAR + 25)

GH48e/L059 BRANCHPOINT: IF R DID NOT REPORT THAT WAS OFFERED ADDITIONAL YEARS OF SERVICE CREDIT (GH47/L045 NOT 6), GO TO GH48f/L060 BRANCHPOINT

L059

Q4239

GH48e. How many years of service credit were you offered?

1 — 20 YEARS

YEARS

DK

RF

GH48f/L060 BRANCHPOINT: IF R DID NOT REPORT THAT WAS OFFERED OTHER SPECIAL INCENTIVES (GH47/L045 NOT 7), GO TO GH49/L061

L060

Q4240

GH48f. IF R MENTIONS OTHER INCENTIVES ONLY (GH47/L045=7 ONLY):

Altogether, how much did the incentive offer amount to?

OTHERWISE:

(Not including [the cash bonus, /(and) improved pension benefits, /(and) permanent medical insurance, /(and) temporary medical insurance, /(and) temporary cash benefit, /(and) additional years of service credited,]) what was the value of the other part of the (first/second) incentive offer?

NOTE: "and" IS INSERTED BETWEEN THE LAST ITEM ON THE LIST AND ITS PREDECESSOR.

[IWER: USE ZERO FOR NONE]

	DK	RF
--	----	----

AMOUNT

NOTE: ALL TYPES OF INCENTIVES SELECTED AT GH47/L045 ARE INCLUDED IN THE QUESTION TEXT.

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
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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]

_____	9995 NEVER	DK	RF
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 SECTIONS 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: IF R GIVES NUMBER OF YEARS, PRESS [ENTER] AND RECORD THE NUMBER ON THE NEXT SCREEN]

2. ALL YEARS BETWEEN <i>FIRST JOB (GH52Y4/L068)</i> AND <i>EARLIEST JOB REPORTED IN SECTION J, K OR L (L094EarliestJob)</i>	8. DK	9. RF	NO ENTRY
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]

_____	DK	RF	NO ENTRY
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).

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

[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]

	DK	RF	NO ENTRY
START YEAR			GO TO GH52bc/L076 BRANCHPOINT

AND

L070
Q4267

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

	DK	RF
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: IF R GIVES NUMBER OF YEARS, PRESS [ENTER] AND RECORD THE NUMBER ON THE NEXT SCREEN]

1. ALL OF THESE YEARS	2. ALL YEARS BETWEEN <i>FIRST JOB (GH52Y4/L068)</i> AND <i>EARLIEST JOB REPORTED IN SECTION J, K OR L (L094EarliestJob)</i>	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]

DK	RF	NO ENTRY
----	----	----------

NUMBER OF YEARS

|

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]

DK	RF	NO ENTRY
----	----	----------

START YEAR

|

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]

DK	RF
----	----

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	_____	<input type="checkbox"/> DK	<input type="checkbox"/> RF
	L078		L079		
	Q4278		Q4279		
	GH52e1. START YEAR		GH52e2. END YEAR		

SECOND EMPLOYMENT PERIOD

[IWER: IF R HAD ONLY ONE GOVERNMENT JOB, PRESS [ENTER] FOR NONE]
(IF [ENTER] WAS PRESSED FOR NONE AT L080, GO TO GH52f/L082)

FROM	_____	TO	_____	<input type="checkbox"/> DK	<input type="checkbox"/> RF
	L080		L081		
	Q4280		Q4281		
	GH52e3. START YEAR		GH52e4. END YEAR		

L082

Q4282

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			

L083
Q4283

GH52g1. During what years were you employed by the federal government?

FIRST EMPLOYMENT PERIOD

FROM	_____	TO	_____	<input type="checkbox"/> DK	<input type="checkbox"/> RF
	L083		L084		
	Q4283		Q4284		
	GH52g1. START YEAR		GH52g2. END YEAR		

SECOND EMPLOYMENT PERIOD

[IWER: IF R HAD ONLY ONE GOVERNMENT JOB, PRESS [ENTER] FOR NONE]
 (IF [ENTER] WAS PRESSED FOR NONE AT L085, GO TO G52h/)

FROM	_____	TO	_____	<input type="checkbox"/> DK	<input type="checkbox"/> RF
	L085		L086		
	Q4285		Q4286		
	GH52g3. START YEAR		GH52g4. END YEAR		

L087
Q4287

GH52h. 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/Did] you ever work in a job where you did not pay social security taxes?

1. YES	5. NO	8. DK	9. RF
GO TO GH54/L092 (L ASSIST)			

L088

Q4288

GH52i1. During what years were you first employed in a job where social security taxes were not paid?

FIRST EMPLOYMENT PERIOD

FROM	_____	TO	_____	<input type="checkbox"/> DK	<input type="checkbox"/> RF
	L088		L089		
	Q4288		Q4289		
	GH52i1. START YEAR		GH52i2. END YEAR		

SECOND EMPLOYMENT PERIOD

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

FROM	_____	TO	_____	<input type="checkbox"/> DK	<input type="checkbox"/> RF
	L090		L091		
	Q4290		Q4291		
	GH52i3. START YEAR		GH52i4. END YEAR		

L092

Q4302

GH54. L ASSIST

IWER:

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

- | | | | |
|----------|----------------|-------------------------------|--|
| 1. NEVER | 2. A FEW TIMES | 3. MOST OR ALL
OF THE TIME | 4. THE SECTION WAS DONE
BY A PROXY REPORTER |
|----------|----------------|-------------------------------|--|

GO TO SECTION M