

MODULE 4: ASSET OWNERSHIP

V151_CHKSAVWHO_FIN_IC_228

(piRTab1X009AModule_V = MODULE4)

- | | | |
|---|---------------|---|
| 1 | EXPR IS FALSE | GO TO V202_Homevalue_IC_240/MODULE 5 |
| 2 | EXPR IS TRUE | |

V000_ModuleIntro

Although we have finished the interview, we would like to ask you a few new questions. Some questions may be similar to questions we have already asked you, but the researchers are interested in how people respond when the questions are changed just a little.

- | | | |
|---|--------------|------------------------------|
| 1 | R IS WILLING | |
| 9 | R REFUSED | GO TO END OF MODULE 4 |

V151_CHKSAVWHO_FIN_IC_230

(piRTab1X007AFinFam IN [FINANCIAL_FAMILYR , FINANCIALR])

- | | | |
|---|---------------|-------------------------------|
| 1 | EXPR IS FALSE | GO TO V161_CHKSAV_NONF |
| 2 | EXPR IS TRUE | |

V151_CHKSAVWHO_FIN_IC_231

(piSecQCHECKINGQ344_ = YES)

{=HH HAS CHECKING, SAVINGS OR MONEY MARKET ACCOUNT}

- | | | |
|---|---------------|---|
| 1 | EXPR IS FALSE | GO TO V156_STOCKSJNT_FINR_IC_233 |
| 2 | EXPR IS TRUE | |

V151_CHKSAVWHO_FIN

Earlier you told me that you or your [husband/wife/partner] have money in money market, savings or checking accounts. Are all of these accounts jointly owned with your [husband/wife/partner], are some in your name only or are some in your [husband/wife/partner]'s name only?

[IWER: CHOOSE ALL THAT APPLY]

- | | | |
|---|-------------------------------|---|
| 1 | ALL HELD JOINTLY | GO TO V156_STOCKSJNT_FINR_IC_233 |
| 2 | SOME IN R'S NAME | GO TO V156_STOCKSJNT_FINR_IC_233 |
| 3 | SOME IN SPOUSE/PARTNER'S NAME | |
| 8 | DON'T KNOW | GO TO V156_STOCKSJNT_FINR_IC_233 |
| 9 | REFUSED | GO TO V156_STOCKSJNT_FINR_IC_233 |

V152_SPP_ACCOUNTAMT

Excluding money in joint accounts and accounts in your name, what is the total value of the money market, savings and checking accounts held in your [husband/wife/partner]'s name?

[IWER: DO NOT PROBE DK/RF]

AMOUNT: \$ _____ **GO TO V156_STOCKSJNT_FINR_IC_233**
 0 - 10,000,000 Actual Range

- | | |
|------------|------------|
| 99,999,998 | DON'T KNOW |
| 99,999,999 | REFUSED |

UNFOLDING {V153_, V154_, V153_}SPP_ACCOUNTAMT

Question text: Would it amount to a total of less than \$____ , more than \$____ , or what?

PROCEDURES: UNFM_3up, UNFM_2Up1Down, UNFM_1Up2Down
 BREAKPOINTS: **\$5,000, \$50,000, \$150,000**, \$300,000
 RANDOM ENTRY POINTS: \$5,000, \$50,000, \$150,000
 ENTRY POINT ASSIGNMENT 1, 2 OR 3 AT X046

V156_STOCKSJNT_FINR_IC_233

(piStockAssetIncome**Q316_ = YES**)
 {=HH HAS STOCK FUNDS}

- | | | |
|---|---------------|------------------------------|
| 1 | EXPR IS FALSE | GO TO END OF MODULE 4 |
| 2 | EXPR IS TRUE | |

V156_STOCKSJNT_FINR

Earlier you told me that you or your [husband/wife/partner] have money in stocks or stock mutual funds.

Are all of these stocks or stock mutual funds held jointly with your [husband/wife/partner], are some in your name only or are some in your [husband/wife/partner]'s name only?

[IWER: CHOOSE ALL THAT APPLY]

- | | | |
|---|-------------------------------|------------------------------|
| 1 | ALL HELD JOINTLY | GO TO END OF MODULE 4 |
| 2 | SOME IN R'S NAME | GO TO END OF MODULE 4 |
| 3 | SOME IN SPOUSE/PARTNER'S NAME | |
| 8 | DON'T KNOW | GO TO END OF MODULE 4 |
| 9 | REFUSED | GO TO END OF MODULE 4 |

V157_SP_AMTSTOCKS

If your [husband/wife/partner] sold all the stock and stock mutual funds [he/she] owns [his/her] self and paid off anything [he/she] owed on them, about how much would [he/she] have?

[IWER: DO NOT PROBE DK/RF]

AMOUNT: \$ _____ **GO TO END OF MODULE 4**
 0 - 10,000,000 Actual Range

- | | |
|------------|------------|
| 99,999,998 | DON'T KNOW |
| 99,999,999 | REFUSED |

UNFOLDING {V158_, V154_, V160_}SP_AMTSTOCKS

Question text: Would it amount to a total of less than \$____ , more than \$____ , or what?

PROCEDURES: UNFM_3up, UNFM_2Up1Down, UNFM_1Up2Down
 BREAKPOINTS: **\$2,500, \$25,000, \$125,000**, \$400,000
 RANDOM ENTRY POINTS: \$2,500, \$25,000, \$125,000
 ENTRY POINT ASSIGNMENT 1, 2 OR 3 AT X046

V161_CHKSAV_NONF

Now I have just a few questions about your finances.

Do you [or your [husband/wife/partner]] have any checking or savings accounts or money market funds?

- | | | |
|---|------------|-------------------------------|
| 1 | YES | |
| 5 | NO | GO TO V171_STOCKS_NONF |
| 8 | DON'T KNOW | GO TO V171_STOCKS_NONF |
| 9 | REFUSED | GO TO V171_STOCKS_NONF |

V162_CHKSAVAMT_NONF

If you added up all such accounts, about how much would they amount to right now?

IWER: DO NOT PROBE DK/RF

AMOUNT: \$ _____ **GO TO V167_ACCNTAMT_NON_IC_236**
0 - 99,999,996 Actual Range

- | | |
|------------|------------|
| 99,999,998 | DON'T KNOW |
| 99,999,999 | REFUSED |

UNFOLDING {V163_, V164_, V165_}CHKSAVAMT_NONF

Question text: Would they be less than \$____ , more than \$____ , or what?

PROCEDURES: UNFM_3up, UNFM_2Up1Down, UNFM_1Up2Down
BREAKPOINTS: **\$5,000, \$50,000, \$150,000, \$300,000**
RANDOM ENTRY POINTS: \$5,000, \$50,000, \$150,000
ENTRY POINT ASSIGNMENT 1, 2 OR 3 AT X046

V166_CHKSAVWHO_NON

Are all of these money market, savings and checking accounts held jointly with your [husband/wife/partner], are some in your name only or are some in your [husband/wife/partner]'s name only?

[IWER: CHOOSE ALL THAT APPLY]

- | | | |
|---|-------------------------------|-------------------------------|
| 1 | ALL HELD JOINTLY | GO TO V171_STOCKS_NONF |
| 2 | SOME IN R'S NAME | GO TO V171_STOCKS_NONF |
| 3 | SOME IN SPOUSE/PARTNER'S NAME | |
| 8 | DON'T KNOW | GO TO V171_STOCKS_NONF |
| 9 | REFUSED | GO TO V171_STOCKS_NONF |

V167_ACCNTAMT_NON

Excluding money in joint accounts and accounts in your [husband/wife/partner]'s name, what is the total value of the money market, savings and checking accounts held in your name?

[IWER: DO NOT PROBE DK/RF]

AMOUNT: \$ _____ **GO TO V171_STOCKS_NONF**
0 - 10,000,000 Actual Range

- | | |
|------------|------------|
| 99,999,998 | DON'T KNOW |
| 99,999,999 | REFUSED |

UNFOLDING {V168_, V169_, V170_}ACCNTAMT_NON

Question text: Would it amount to a total of less than \$____ , more than \$____ , or what?

PROCEDURES: UNFM_3up, UNFM_2Up1Down, UNFM_1Up2Down
BREAKPOINTS: **\$5,000, \$50,000, \$150,000**, \$300,000
RANDOM ENTRY POINTS: \$5,000, \$50,000, \$150,000
ENTRY POINT ASSIGNMENT 1, 2 OR 3 AT X046

V171_STOCKS_NONF

Do you [or your [husband/wife/partner]] have any shares of stock or stock mutual funds?

- | | | |
|---|------------|------------------------------|
| 1 | YES | |
| 5 | NO | GO TO END OF MODULE 4 |
| 8 | DON'T KNOW | GO TO END OF MODULE 4 |
| 9 | REFUSED | GO TO END OF MODULE 4 |

V172_STOCKAMT_NONF

If you sold all those and paid off anything you owed on them, about how much would you have?

IWER: DO NOT PROBE DK/RF

AMOUNT: \$ _____ **GO TO V176_STOCKSJNT_FINR**
-1,000,000 - 99,999,996 Actual Range

- | | |
|------------|------------|
| 99,999,998 | DON'T KNOW |
| 99,999,999 | REFUSED |

UNFOLDING {V173_, V174_, V175_}ACCNTAMT_NONF

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

PROCEDURES: UNFM_3up, UNFM_2Up1Down, UNFM_1Up2Down
BREAKPOINTS: **\$2,500, \$25,000, \$125,000**, \$400,000
RANDOM ENTRY POINTS: \$2,500, \$25,000, \$125,000
ENTRY POINT ASSIGNMENT 1, 2 OR 3 AT X046

V176_STOCKSJNT_FINR

Are all of these stocks or stock mutual funds held jointly with your [husband/wife/partner], are some in your name only or are some in your [husband/wife/partner]'s name only?

[IWER: CHOOSE ALL THAT APPLY]

- | | | |
|---|-------------------------------|------------------------------|
| 1 | ALL HELD JOINTLY | GO TO END OF MODULE 4 |
| 2 | SOME IN R'S NAME | GO TO END OF MODULE 4 |
| 3 | SOME IN SPOUSE/PARTNER'S NAME | |
| 8 | DON'T KNOW | GO TO END OF MODULE 4 |
| 9 | REFUSED | GO TO END OF MODULE 4 |

V177_SP_AMTSTOCKS

If you sold all the stock and stock mutual funds you, yourself, own and paid off anything you owed on them, about how much would you have?

[IWER: DO NOT PROBE DK/RF]

AMOUNT: \$ _____ **GO TO END OF MODULE 4**
0 - 10,000,000 Actual Range

- | | |
|------------|------------|
| 99,999,998 | DON'T KNOW |
| 99,999,999 | REFUSED |

UNFOLDING {V178_, V179_, V180_}SP_AMTSTOCKS

Question text: Would it amount to a total of less than \$____ , more than \$____ , or what?

PROCEDURES: UNFM_3up, UNFM_2Up1Down, UNFM_1Up2Down
BREAKPOINTS: **\$2,500, \$25,000, \$125,000, \$400,000**
RANDOM ENTRY POINTS: \$2,500, \$25,000, \$125,000
ENTRY POINT ASSIGNMENT 1, 2 OR 3 AT X046

END OF MODULE 4 — GO TO MODULE 5