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 INTERVIEW R (Z076=5)

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 ({J005 or J020}=1)
   R IS NOT CURRENTLY WORKING (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 shown after that.
K003 BRANCHPOINT: IF THIS IS A REINTERVIEW R (Z076=1), GO TO SECTION L

IF R IS WORKING NOW FOR PAY (J005 or J020=1), GO TO SECTION L

K003

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

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

GO TO K038 (K ASSIST)

K004

When did you last work for pay?

OR

K004 YEAR  K005 YEARS AGO

K006 BRANCHPOINT: IF R LAST WORKED FOR PAY MORE THAN 2 YEARS AGO (per K004 or K005), GO TO K007 BRANCHPOINT

K006

In what month was that?

1. JAN  2. FEB  3. MAR  4. APR  5. MAY  6. JUN  7. JUL


K007 BRANCHPOINT: IF (R LAST WORKED FOR PAY MORE THAN 20 YEARS AGO or REFUSED TO ANSWER WHEN S/HE LAST WORKED) (per K004 or K005), GO TO K022

K007

The next questions are about the last job you had. We're interested in your situation near the end of this job.

Did you work for someone else, were you self-employed, or what?

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

1. SOMEONE ELSE  2. SELF-EMPLOYED  8. DK  9. RF
K008
IF R DID NOT REPORT THAT WAS SELF-EMPLOYED (K007 NOT 2):
What kind of business or industry did you work in — that is, what did
you make or do at the place where you worked?

IF R WAS SELF-EMPLOYED (K007=2):
What industry did you work in? That is, what did your company do or
make?
(What industry did you typically work in?)

INDUSTRY

K009 BRANCHPOINT: IF R WAS SELF-EMPLOYED (K007=2) or IS IN {AHEAD or CODA}
COHORT (X023={1 or 2}), GO TO K010

K009
What was the official title of your job?
(The title that your employer used?)

TITLE

K010
What sort of work did you do?
(Tell me a little more about what you did.)

TYPE OF WORK

K011
How many hours a week did you usually work [for that employer/in that
business]?

HOURS PER WEEK

K012 BRANCHPOINT: IF R WAS SELF-EMPLOYED (K007=2) or IS IN {AHEAD or CODA}
COHORT (X023={1 or 2}), GO TO K014
K012
Not counting any overtime hours, could you have reduced the number of hours in your regular work schedule?

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

GO TO K014

K013
Could you have reduced your work hours by quite a lot, say to half what you usually worked, without affecting either your hourly pay rate or your fringe benefits?

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

K014
IWER: READ SLOWLY:
Counting paid vacations as weeks of work, how many weeks a year did you usually work?

DK   RF

NUMBER OF WEEKS

K039 BRANCHPOINT: IF R WAS SELF-EMPLOYED (K007=2) or IS IN {AHEAD or CODA} COHORT (X023={1 or 2}), GO TO K015

K039
Were you salaried on that job, paid by the hour, or what?

1. SALARIED   2. HOURLY   3. PIECEWORK/COMMISSION

7. OTHER/COMBINATION   8. DK   9. RF
K015

IF R DID NOT REPORT THAT WAS SELF-EMPLOYED (K007 NOT 2):
How much were you earning, before deductions, when you left that employer?

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

IF R WAS SELF-EMPLOYED (K007=2):
How much were you earning, before deductions, when you stopped working for the business?

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

AMOUNT

0    DK    RF

GO TO K018 BRANCHPOINT

K016

PER:

1. HOUR  2. WEEK  3. EVERY TWO WEEKS/BI-WEEKLY  4. MONTH  5. TWICE A MONTH

6. YEAR  7. OTHER (SPECIFY)  8. DK  9. RF

K018 BRANCHPOINT: IF R IS IN {AHEAD or CODA} COHORT (X023={1 or 2}), GO TO K022
IF R WAS SELF-EMPLOYED (K007=2), GO TO K020

K018

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

[IWER: DO NOT PROBE DK/RF]

NUMBER OF EMPLOYEES

DK    RF

GO TO K020
K019

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

1. FEWER THAN 5  
2. 5 TO 14  
3. 15 TO 24  
4. 25 TO 99  
5. 100 TO 499  
6. 500 OR MORE  
8. DK  
9. RF

K020

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

[IWER: DO NOT PROBE DK/RF]

IF R WAS SELF-EMPLOYED (K007=2):
[IWER: ENTER "-1" IF ONLY ONE LOCATION]

IF R DID NOT REPORT THAT WAS SELF-EMPLOYED (K007 NOT 2):
[IWER: THE NUMBER MUST BE AT LEAST AS LARGE AS K018]

NUMBER OF EMPLOYEES

GO TO K022

NOTE: -1 RESPONSES RECORDED DURING DATA COLLECTION ARE RECODED AS -2 IN DATA DISTRIBUTION FILES.

K021

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

1. FEWER THAN 5  
2. 5 TO 14  
3. 15 TO 24  
4. 25 TO 99  
5. 100 TO 499  
6. 500 OR MORE  
8. DK  
9. RF

K022

When did you start working for [that employer/yourself]?

OR  

K022  
K023 YEARS AGO

OR  

K024  
AT AGE

K025 BRANCHPOINT: IF (R LAST WORKED FOR PAY MORE THAN 20 YEARS AGO or REFUSED TO ANSWER WHEN S/HE LAST WORKED) (per K004 or K005), GO TO K038 (K ASSIST)

K025
How much were you earning, before taxes and other deductions, when you started?

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

<table>
<thead>
<tr>
<th>AMOUNT</th>
<th></th>
<th></th>
<th>0</th>
<th>DK</th>
<th>RF</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO K028</td>
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K026

PER:

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<th></th>
<th></th>
<th></th>
<th>1. HOUR</th>
<th>2. WEEK</th>
<th>3. EVERY TWO WEEKS/BI-WEEKLY</th>
<th>4. MONTH</th>
<th>5. TWICE A MONTH</th>
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<tr>
<td></td>
<td></td>
<td></td>
<td>6. YEAR</td>
<td>7. OTHER (SPECIFY)</td>
<td>8. DK</td>
<td>9. RF</td>
<td></td>
</tr>
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<td></td>
<td>K027</td>
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</tbody>
</table>

K028 BRANCHPOINT: IF R IS IN {AHEAD or CODA} COHORT (X023=(1 or 2)), GO TO K031

IF R WAS SELF-EMPLOYED (K007=2), GO TO K029

K028

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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th>1. YES</th>
<th>5. NO</th>
<th>8. DK</th>
<th>9. RF</th>
</tr>
</thead>
</table>


K029

IF R WAS SELF-EMPLOYED (K007=2):
Why did you stop working at this business?

IF R DID NOT REPORT THAT WAS SELF-EMPLOYED (K007 NOT 2):
Why did you leave that employer?

[IWER: PROBE 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: DO NOT PROBE BUT ENTER ALL THAT APPLY]

1. BUSINESS CLOSED  2. LAID OFF/LET GO  3. POOR HEALTH/DISABLED  4. FAMILY CARE
6. QUIT  7. RETIRED  97. OTHER (SPECIFY)  98. DK  99. RF

K031

IF R DID NOT REPORT THAT WAS SELF-EMPLOYED (K007 NOT 2):
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.

IF R WAS SELF-EMPLOYED (K007=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?

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

K032 BRANCHPOINT: IF R IS IN {AHEAD or CODA} COHORT (X023={1 or 2}), GO TO K038 (K ASSIST)

IF R DID NOT REPORT THAT WAS INCLUDED IN PENSION PLAN (K031={5 or DK or RF}), GO TO K035
In how many different pension plans were you included on this job?

1 — 8 PLANS

Is this just one plan or more than one?

1. ONE PLAN  3. MORE THAN ONE  8. DK  9. RF

BEGINNING OF PENSION BLOCK-2
(KW001_2 — KW042_2)

NOTE: THE FOLLOWING PENSION LOOP (KW001_2) IS A REPLICATE OF THAT APPEARING
IN SECTION J (JW001_1 THROUGH JW041_1), WITH THE ADDITION OF QUESTIONS
W029 & W034. THE "_2" AFTER EACH LABEL INDICATES THAT THIS IS THE SECOND
TIME THIS BLOCK IN THE QUESTIONNAIRE.
***BEGINNING OF KW001_2 LOOP: QUESTIONS KW001_2 THROUGH KW042_2 ARE REPEATED FOR UP TO FOUR PENSION PLANS IF R REPORTED THE NUMBER OF PLANS AT K032 (K032={1-8}) OR FOR UP TO TWO PLANS IF R REPORTED HAVING PLANS AT K033(K033={1 or 3}).***

KW001_2

IF THIS IS THE FIRST PLAN and {R HAS MORE THAN ONE PLAN (K032 ≥2 or K033=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 (K032 ≥2) or THE SECOND PLAN FOR (K033=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 ((K032 or K033)=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?

[IWER: IF R HAS MULTIPLE PLANS OF DIFFERENT TYPES, RECORD THEM AS SEPARATE PLANS RATHER THAN COMBINING THEM AS “BOTH”.

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 KW021_2  GO TO K035 (OUT OF KW001_2 LOOP)

KW002_2
IF R HAS BOTH TYPES OF PLAN (KW001_2=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: IF R SAYS ‘DOES NOT HAVE AN ACCOUNT’, ENTER [-1]]
[IWER: DO NOT PROBE DK/RF]

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

GO TO KW006_2

NOTE: -1 RESPONSES RECORDED DURING DATA COLLECTION ARE RECODED AS -2 IN DATA DISTRIBUTION FILES.

KW003_2 - KW005_2 Unfolding Sequence
Question text: Did it amount to a total of less than $____ , more than $____ , or what?

PROCEDURES: 2Up1Down, 1Up2Down
BREAKPOINTS: $5,000, $20,000, $50,000, $150,000
RANDOM ENTRY POINTS: $20,000, $50,000
ENTRY POINT ASSIGNMENT: 1 OR {NOT 1} AT X503
ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND
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, did you lose your benefits, did you receive or are you receiving one or more installments, 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. LOST BENEFITS
6. RECEIVED/RECEIVING INSTALLMENTS
7. OTHER (SPECIFY)
8. DK
9. RF

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

KW006_2 BRANCHPOINT: IF R [WITHDREW THE MONEY or LOST BENEFITS] (KW006_2={1 or 6}), GO TO KW008_2 BRANCHPOINT

Were you allowed to receive benefits in a lump-sum payment?

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

KW008_2 BRANCHPOINT: IF MONEY IN PENSION ACCOUNT WAS LEFT TO ACCUMULATE ONLY (KW006_2=3 ONLY), GO TO KW009_2

IF R DID NOT REPORT THAT MONEY WAS LEFT TO ACCUMULATE IN PENSION ACCOUNT (KW006_2 NOT 3), GO TO KW063_2 BRANCHPOINT

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

AMOUNT

KW063_2 BRANCHPOINT: IF R [DID NOT RECEIVE OR IS NOT RECEIVING] {ONE OR MORE} INSTALLMENTS (KW006_2 NOT 7), GO TO KW009_2 BRANCHPOINT
How much money in total did you receive in installments?

- DK
- RF

AMOUNT

Branchpoint:

How much is in that account now?

- DK
- RF

AMOUNT

GO TO KW013_2 BRANCHPOINT

Unfolding Sequence:

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

PROCEDURES: 2Up1Down, 1Up2Down
BREAKPOINTS: $10,000, $20,000, $50,000, $150,000
RANDOM ENTRY POINTS: $20,000, $50,000
ENTRY POINT ASSIGNMENT: 1 OR {NOT 1} AT X504
ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

How much did you convert to an annuity?

- DK
- RF

AMOUNT

Branchpoint:

IF R DID NOT REPORT THAT MONEY IN PENSION ACCOUNT WAS CONVERTED TO AN ANNUITY ONLY (KW006_2=4 ONLY), GO TO KW014_2
KW014_2
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]

50-80  AGE

______________________________  DK  RF

AGE

KW015_2
How much are the benefits from that annuity per month or year?

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

______________________________  0  DK  RF

AMOUNT

GO TO KW049_2
(AFTER KW017_2)

KW016_2
[IWER: PROBE IF NECESSARY]
Is that per month or year?

PER:

4. MONTH  6. YEAR  7. OTHER (SPECIFY)  8. DK  9. RF

KW017_2
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 KW054_2 BRANCHPOINT

7. OTHER (SPECIFY)  8. DK  9. RF

GO TO KW054_2 BRANCHPOINT

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

What is that time period?

OR  OR  OR  DK  RF

KW051_2  KW052_2  KW053_2
UNTIL YEAR  UNTIL AGE  YEARS

KW054_2 BRANCHPOINT: IF R IS NOT MARRIED/PARTNERED (X065 {NOT 1 and NOT 3}), GO TO KW018_2 BRANCHPOINT

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)  8. DK  9. RF

KW055_2

KW018_2 BRANCHPOINT: IF R DID NOT REPORT THAT MONEY IN PENSION ACCOUNT WAS ROLLED OVER INTO AN IRA (KW006_2 NOT 2) or THAT WAS ONLY RESPONSE (KW006_2=2 ONLY), GO TO KW056_2 BRANCHPOINT
KW018_2
How much did the rollover amount to?

_________________________  DK  RF
AMOUNT

KW056_2 BRANCHPOINT: IF R DID NOT REPORT THAT WITHDREW THE MONEY (KW006_2 NOT 1), GO TO KW021_2 BRANCHPOINT
IF R WITHDREW THE MONEY ONLY (KW006_2=1 ONLY), GO TO KW057_2

KW056_2
How much money did you withdraw?

_________________________  DK  RF
AMOUNT

KW057_2
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

KW021_2 BRANCHPOINT: IF PLAN IS TYPE B ONLY (KW001_2=2), GO TO KW042_2
IF R HAS BOTH TYPE A AND TYPE B PLANS or R DIDN’T KNOW (KW001_2={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 or a lump-sum payment when you left, did you lose your benefits, did you roll it over into an IRA, or what?

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

<table>
<thead>
<tr>
<th>1. EXPECT FUTURE BENEFITS</th>
<th>2. RECEIVING BENEFITS NOW</th>
<th>3. RECEIVED CASH SETTLEMENT/LUMP-SUM</th>
<th>4. ROLLED OVER INTO IRA</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>6. LOST BENEFITS</td>
<td>7. OTHER (SPECIFY)</td>
<td>8. DK</td>
<td>9. RF</td>
</tr>
</tbody>
</table>

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

KW064_2 BRANCHPOINT: IF R REPORTED {RECEIVED CASH SETTLEMENT/LUMP-SUM or LOST BENEFITS} KW021_2={3 or 6}, GO TO KW023_2 BRANCHPOINT

KW064_2
Were you allowed to receive benefits as a cash settlement or a lump-sum payment?

<table>
<thead>
<tr>
<th>1. YES</th>
<th>5. NO</th>
<th>8. DK</th>
<th>9. RF</th>
</tr>
</thead>
</table>

KW023_2 BRANCHPOINT: IF R DID NOT REPORT THAT IS RECEIVING BENEFITS NOW (KW021_2 NOT 2), GO TO KW030_2 BRANCHPOINT
In what month and year did you start to receive these benefits?

MONTH:

1. JAN  2. FEB  3. MAR  4. APR  5. MAY  6. JUN  7. JUL

YEAR

How much are the benefits per month or year?

[IWER: DO NOT PROBE DK/RF]

AMOUNT

GO TO KW026_2  GO TO KW028_2

J116_2 - J118_2 Unfolding Sequence
Question text: Do they amount to less than $____ per month, more than $____ per month, or what?

PROCEDURES: 2Up1Down, 1Up2Down
BREAKPOINTS: $200, $400, $1,200, $1,600
RANDOM ENTRY POINTS: $400, $1,200
ENTRY POINT ASSIGNMENT: 1 OR {NOT 1} AT X505
ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

KW026_2 BRANCHPOINT: GO TO KW028_2

PER:

4. MONTH  6. YEAR  7. OTHER (SPECIFY)  8. DK  9. RF

KW027_2
KW028_2
Are the benefits adjusted for changes in the cost of living?

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

GO TO KW059_2

KW029_2
Have they ever been adjusted for changes in the cost of living?

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

GO TO KW030_2 BRANCHPOINT

KW059_2
Are the benefits adjusted automatically?

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

KW030_2 BRANCHPOINT: IF R DID NOT REPORT THAT RECEIVED CASH SETTLEMENT/LUMP-SUM (KW021_2 NOT 3), GO TO KW033_2 BRANCHPOINT

KW030_2
How much did the cash settlement amount to?

[IWER: DO NOT PROBE DK/RF]

 ---

AMOUNT

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

GO TO KW031_2

J123-J125 Unfolding Sequence
Question text: Did it amount to a total of less than $____, more than $____, or what?

PROCEDURES: 2Up1Down, 1Up2Down
BREAKPOINTS: $2,000, $6,000, $60,000, $250,000
RANDOM ENTRY POINTS: $6,000, $60,000
ENTRY POINT ASSIGNMENT: 1 OR {NOT 1} AT X506
ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND
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  

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

How much did the rollover amount to?

IRA ROLLOVER

AMOUNT

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

KW031_2

KW032_2

KW033_2 BRANCHPOINT: IF R DID NOT REPORT THAT ROLLED PENSION OVER INTO IRA (KW021_2 NOT 4), GO TO KW034_2 BRANCHPOINT

KW034_2 BRANCHPOINT: IF R DID NOT REPORT THAT EXPECTS FUTURE BENEFITS FROM THIS PLAN (KW021_2 NOT 1), GO TO KW042_2

KW035_2 BRANCHPOINT: IF THIS IS NOT A SELF INTERVIEW (A009 NOT 1), GO TO KW042_2
KW035_2
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

AGE

GO BACK TO KW021_2 AND CHANGE RESPONSE TO RECEIVING BENEFITS NOW (KW021_2=2)

GO TO KW042_2

KW036_2
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 KW038_2
GO TO KW041_2
GO TO KW042_2

KW037_2
[IWER: ENTER PERCENT OF FINAL PAY]

PERCENT

DK  RF

GO TO KW042_2
How much do you expect to receive?

[IWER: DO NOT PROBE DK/RF]

0 DK RF

AMOUNT

GO TO KW039_2 GO TO KW042_2

Is that per month or year?

PER:

4. MONTH 6. YEAR 7. OTHER (SPECIFY) 8. DK 9. RF

GO TO KW042_2

[IWER: ENTER LUMP SUM AMOUNT]

DK RF

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

30–80 AGE

95 NO AGE REQUIREMENT   DK   RF

END OF KW001_2 LOOP: IF THERE ARE MORE PENSION PLANS GIVEN, REPEAT QUESTIONS KW001_2 THROUGH KW042_2 FOR UP TO FOUR PENSION PLANS IF R REPORTED HAVING MORE THAN ONE PLAN AT K032 (K032={2-8}) OR FOR TWO PLANS IF R REPORTED HAVING MORE THAN ONE PLAN AT K033 (K033=3). IF NOT, CONTINUE ON TO K035.

END OF PENSION BLOCK-2: (KW001_2 — KW042_2)

Over the last 10 years, since 1996, have you ever been on temporary layoff, or unemployed and looking for work?

[OWER: INCLUDE CURRENT PERIOD IF R IS NOW LOOKING FOR WORK]

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

GO TO KW158_3 BRANCHPOINT

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

NUMBER OF TIMES

KW158_3 BRANCHPOINT: IF R WAS SELF-EMPLOYED (K007=2), GO TO K038 (K ASSIST)
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

GO TO K038
(K ASSIST)

KW159_3
What is the address of the place where you work(ed)?

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

________________________
ADDRESS 1

GO TO KW161_3
GO TO K038
(K ASSIST)

________________________
ADDRESS 2


________________________
CITY

GO TO K038
(K ASSIST)
NOTE: THE IWER SELECTS FROM A MENU OF STATE NAMES, INCLUDING WASHINGTON, D.C., AND PUERTO RICO.

END OF EMPLOYER INFORMATION BLOCK-3:
(KW158_3 — KW165_3)

K038
K ASSIST
IWER:
HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN SECTION K — LAST JOB?

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 L