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

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**MAJOR FLOW CONTROL, CONDITION AND FILL VARIABLES \***

THIS IS A **REINTERVIEW HH** (X024=1);  
THIS IS A **NEW INTERVIEW HH** (X024 NOT 1)

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** (Z076=5)

THIS IS A **FINANCIAL R** (X007=1);  
THIS IS A **FAMILY R** (X007=2);  
THIS IS A **FINANCIAL & FAMILY R** (X007=3);  
THIS IS A **NON-FINANCIAL & NON-FAMILY R** (X007=4);

R's **LAST IW MONTH** (per Z092), **YEAR** (per Z093)

R **OWNED A MAIN RESIDENCE OR {MOBILE {HOME AND/OR SITE}} OR FARM** AT R's **LAST IW**  
(X079=1)

R **WAS ASKED ABOUT VALUE OF MAIN RESIDENCE** (H020 NOT EMPTY);  
R **WAS ASKED ABOUT VALUE OF SECOND RESIDENCE** (H166} NOT EMPTY)

R **CURRENTLY OWNS MAIN RESIDENCE** (H004=1);  
R **CURRENTLY OWNS {SECOND RESIDENCE OR CONDO}** (H151=1)  
R **CURRENTLY OWNS {ALL or PART OF} FARM** (H008={1 or 2});  
R **CURRENTLY OWNS {MOBILE HOME AND SITE}** (H014=1);

R **OWNED REAL ESTATE OTHER THAN HOME** IN R's **LAST IW** (Z098=1);  
R **CURRENTLY OWNS REAL ESTATE OTHER THAN HOME/FARM/BUSINESS** (Q133={1 or 2})

R **OWNED BUSINESS OTHER THAN FARM** AT R's **LAST IW** (X086=1);  
R **CURRENTLY OWNS BUSINESS OTHER THAN FARM** (Q147 ={1 or 2})

R **OWNED {STOCKS OR STOCK MUTUAL FUNDS}** AT R's **LAST IW** (X087 NOT 1);  
R **CURRENTLY OWNS {STOCKS OR STOCK MUTUAL FUNDS}** (Q316 NOT 1)

**NUMBER OF CHILDREN/HHMS MOVED {IN OR OUT} OF HH SINCE R's LAST IW** (per A102);  
**NO ONE MOVED {IN OR OUT} OF HH SINCE R's LAST IW** (A102=0)

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\* 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.

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R006

In what year did you buy a home?

\_\_\_\_\_

YEAR

DK	RF
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GO TO R007

R005 BRANCHPOINT: IF YEAR AT R006 WAS MORE THAN 2 YEARS AGO, GO TO R007

R005

(What month was that?)

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

R007

What was the purchase price?

[IWER: DO NOT PROBE DK/RF]

\_\_\_\_\_

AMOUNT

DK	RF
----	----

GO TO R012  
BRANCHPOINT

R008-R010 Unfolding Sequence

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

PROCEDURE: 1Up1Down  
BREAKPOINTS: \$15,000, \$50,000, \$200,000  
ENTRY POINT: \$50,000

R012 BRANCHPOINT: IF R BOUGHT BUT DID NOT SELL A HOME (R003=1), GO TO R023

R012

In what year did you sell a home?

\_\_\_\_\_

YEAR

DK	RF
----	----

GO TO R013

R011 BRANCHPOINT: IF YEAR AT R012 WAS MORE THAN 2 YEARS AGO, GO TO R013

R011

(What month was that?)

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

R013

What was the selling price?

[IWER: DO NOT PROBE DK/RF]

\_\_\_\_\_

AMOUNT

DK	RF
----	----

GO TO R018

R014-R016 Unfolding Sequence

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

PROCEDURE: 1Up1Down  
BREAKPOINTS: \$15,000, **\$50,000**, \$200,000  
ENTRY POINT: \$50,000

R018

In what year did you buy the home you just sold?

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

\_\_\_\_\_

YEAR

DK	RF
GO TO R019	

R017 BRANCHPOINT: IF YEAR AT R018 WAS MORE THAN 2 YEARS AGO, GO TO R019

R017

(What month was that?)

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

R019

What was the purchase price?

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

[IWER: DO NOT PROBE DK/RF]

\_\_\_\_\_

AMOUNT

DK	RF
GO TO R023	

R020-R022 Unfolding Sequence

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

PROCEDURE: 1Up1Down  
 BREAKPOINTS: \$15,000, **\$50,000**, \$200,000  
 ENTRY POINT: \$50,000

R023

IF R OWNS {SECOND HOME OR CONDO OR OWN TIMESHARES IN ONE} (X027=0 or H151=1):  
[Since R's LAST IW MONTH, YEAR/In the last two years], did you (or your [husband/wife/partner]) make any major additions or home improvements to a primary residence or second home that you owned?

OTHERWISE:

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

[IWER: DO NOT COUNT GENERAL MAINTENANCE OR UPKEEP]

1. YES	5. NO	8. DK	9. RF
GO TO R028 BRANCHPOINT			

R024

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

[IWER: DO NOT PROBE DK/RF]

\_\_\_\_\_

AMOUNT

DK	RF
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GO TO R028 BRANCHPOINT
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R025-R027 Unfolding Sequence

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

PROCEDURE: 1Up1Down

BREAKPOINTS: \$2,000, **\$10,000**, \$50,000

ENTRY POINT: \$10,000

R028 BRANCHPOINT: IF R DID NOT REPORT OWNING ANY REAL ESTATE OTHER THAN HOME/FARM/BUSINESS {IN R's LAST IW (Z098 NOT 1) and IN THIS IW (Q133 {NOT 1 and NOT 2})}, GO TO R049 BRANCHPOINT
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R028

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

1. YES	5. NO	8. DK	9. RF
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<b>GO TO R034</b>
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R029

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

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

<b>GO TO R044</b>
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R030

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

[IWER: DO NOT PROBE DK/RF]

\_\_\_\_\_

AMOUNT

|

<b>GO TO R035 BRANCHPOINT</b>
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DK	RF
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R031-R033 Unfolding Sequence

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

PROCEDURE: 1Up1Down  
 BREAKPOINTS: \$50,000, **\$200,000**, \$500,000  
 ENTRY POINT: \$200,000

R034 BRANCHPOINT: GO TO R035 BRANCHPOINT

R034

Did you (and your [husband/wife/partner]) also buy any real estate of this sort [since R's LAST IW MONTH, YEAR/in the last two years]?

1. YES	5. NO	8. DK	9. RF
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**GO TO R039**

R035 BRANCHPOINT: IF R DID NOT SELL ANY OTHER REAL ESTATE (R028 NOT 1), GO TO R044

R035

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

[IWER: DO NOT PROBE DK/RF]

\_\_\_\_\_

AMOUNT

DK	RF
----	----

|

**GO TO R044**

R036-R038 Unfolding Sequence

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

PROCEDURE: 1Up1Down  
 BREAKPOINTS: \$50,000, **\$200,000**, \$500,000  
 ENTRY POINT: \$200,000

R039 BRANCHPOINT: GO TO R044

R039

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

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

**GO TO R044**



R040

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

[IWER: DO NOT PROBE DK/RF]

\_\_\_\_\_

AMOUNT

DK	RF
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|

<b>GO TO R044</b>
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R041-R043 Unfolding Sequence

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

PROCEDURE: 1Up1Down

BREAKPOINTS: \$50,000, **\$200,000**, \$500,000

ENTRY POINT: \$200,000

R044

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

[IWER: DO NOT COUNT GENERAL MAINTENANCE OR UPKEEP]

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

<b>GO TO R049 BRANCHPOINT</b>
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R045

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

[IWER: DO NOT PROBE DK/RF]

\_\_\_\_\_

AMOUNT

DK	RF
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|

<b>GO TO R049 BRANCHPOINT</b>
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R046-R048 Unfolding Sequence

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

PROCEDURE: 1Up1Down

BREAKPOINTS: \$2,000, **\$10,000**, \$50,000

ENTRY POINT: \$10,000

R049 BRANCHPOINT: IF R DID NOT REPORT OWNING {ALL OR PART} OF A BUSINESS {AT R's LAST IW (X086 NOT 1) and IN THIS IW (Q147 {NOT 1 and NOT 2})}, GO TO R061 BRANCHPOINT

R049

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

1. YES	5. NO	8. DK	9. RF
<b>GO TO R054</b>			

R050

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

[IWER: DO NOT PROBE DK/RF]

AMOUNT	DK	RF
<b>GO TO R054</b>		

R051-R053 Unfolding Sequence

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

PROCEDURE: 1Up1Down  
 BREAKPOINTS: \$5,000, **\$50,000**, \$500,000  
 ENTRY POINT: \$50,000

R054

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

1. YES	5. NO	8. DK	9. RF
<b>GO TO R061 BRANCHPOINT</b>			

R055

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

(What was the selling price?)

[IWER: WE WANT THE PRICE THE BUYER PAID]

[IWER: DO NOT PROBE DK/RF]

\_\_\_\_\_

AMOUNT

DK

RF

GO TO R060

R056-R058 Unfolding Sequence

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

PROCEDURE: 1Up1Down

BREAKPOINTS: \$10,000, \$100,000, \$1,000,000

ENTRY POINT: \$100,000

R060

In what year did you sell that?

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

\_\_\_\_\_

YEAR

DK

RF

GO TO R061  
BRANCHPOINT

R059 BRANCHPOINT: IF YEAR AT R060 WAS MORE THAN 2 YEARS AGO, GO TO R061 BRANCHPOINT

R059

(What month was that?)

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

R061 BRANCHPOINT: IF R DID NOT REPORT OWNING {STOCKS OR STOCK MUTUAL FUNDS} {AT R's LAST IW (X087 NOT 1) and IN THIS IW (Q316 NOT 1)}, GO TO R077 BRANCHPOINT

R061

Not counting any IRAs, Keoghs or pension accounts, [since R's LAST IW MONTH, YEAR/in the last two years], have you (or your [husband/wife/

partner]) bought any stock, or put money into stock mutual funds, including any automatic reinvestments?

1. YES	5. NO	8. DK	9. RF
GO TO R072			

R062

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

1. YES	5. NO	8. DK	9. RF
GO TO R068			

R063

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

1. PUT MONEY IN	2. TAKE MONEY OUT	3. PUT IN ABOUT AS MUCH AS TOOK OUT	8. DK	9. RF
GO TO R077 BRANCHPOINT				

R064

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

[IWER: DO NOT PROBE DK/RF]

_____	DK	RF
AMOUNT		
GO TO R077 BRANCHPOINT		

R065-R067 Unfolding Sequence

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

PROCEDURE: 1Up1Down

BREAKPOINTS: \$2,500, \$10,000, \$50,000

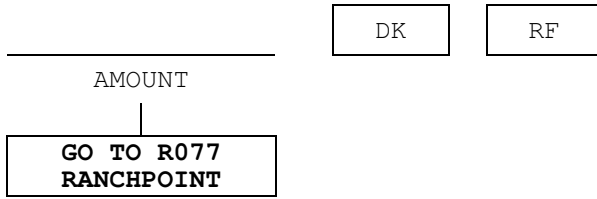
ENTRY POINT: \$10,000

R068 BRANCHPOINT: GO TO R077 BRANCHPOINT

R068

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

[IWER: DO NOT PROBE DK/RF]



R069-R071 Unfolding Sequence

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

PROCEDURE: 1Up1Down

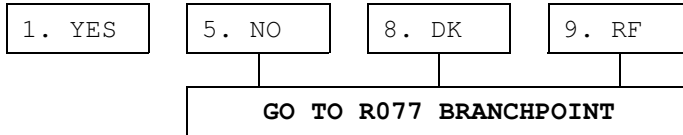
BREAKPOINTS: \$5,000, **\$25,000**, \$100,000

ENTRY POINT: \$25,000

R072 BRANCHPOINT: GO TO R077 BRANCHPOINT

R072

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



R073

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

[IWER: DO NOT PROBE DK/RF]

\_\_\_\_\_

AMOUNT

DK

RF

**GO TO R077  
BRANCHPOINT**

R074-R076 Unfolding Sequence

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

PROCEDURE: 1Up1Down

BREAKPOINTS: \$5,000, **\$25,000**, \$100,000

ENTRY POINT: \$25,000

R077 BRANCHPOINT: IF R DID NOT REPORT OWNING A HOME AT R's LAST IW (X079 NOT 1) or R WAS ASKED ABOUT THE VALUE OF A {MAIN OR SECOND} HOME IN THIS IW ({H016 or H020 or H166} NOT EMPTY), GO TO R083 BRANCHPOINT

IF R DID NOT REPORT THAT S/HE DID NOT {BUY OR SELL} A {MAIN OR SECOND} HOME SINCE R's LAST IW (R002 NOT 5), GO TO R081 BRANCHPOINT

R077

Our records show that you (and your [husband/wife/partner]) owned a home in [R's LAST IW MONTH, YEAR/the last two years] that you do not now own and did not sell.

What happened to that home — did you give it to someone, are our records incorrect, or what?

1. GAVE TO SOMEONE

2. RECORDS INCORRECT

7. OTHER (SPECIFY)  
\_\_\_\_\_

8. DK

9. RF

**GO TO R081 BRANCHPOINT**

R079

Who did you (and your [husband/wife/partner]) give the house to, (that is, what is their relationship to you)?

[IWER: CHOOSE ALL THAT APPLY]

2. CHILD/CHILD-IN-LAW /GRANDCHILD	3. OTHER RELATIVE	4. SOMEONE ELSE	8. DK	9. RF
GO TO R081 BRANCHPOINT				

R080

(Which child is that?)

[IWER: CHOOSE ALL THAT APPLY]

IF GRANDCHILD:

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

CHILD NAME(S) [DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]
3. TO 42. CHILD NAME(S)
[ROWS PROVIDED BY BLAISE AS NECESSARY]
92. DECEASED CHILD
93. ALL CHILDREN
DK
RF

R081 BRANCHPOINT: IF R SOLD BUT DID NOT BUY A HOME (R003 NOT 2), GO TO R083 BRANCHPOINT

R081

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

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

1. INVEST THE MONEY	2. GAVE TO SOMEONE	3. RECORDS INCORRECT	7. OTHER (SPECIFY)  R082	8. DK	9. RF
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R083 BRANCPOINT: IF NO ONE MOVED {IN OR OUT} OF THE HH SINCE R's LAST IW (A102=0), GO TO R101 (R ASSIST)

R083

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

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

1. YES, ASSETS	2. YES, DEBTS	3. BOTH	5. NO	8. DK	9. RF
	GO TO R088		GO TO R092		

R084

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

[IWER: DO NOT PROBE DK/RF]

\_\_\_\_\_

DK	RF
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AMOUNT

GO TO R088  
BRANCHPOINT

R085-R087 Unfolding Sequence

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

PROCEDURE: 1Up1Down

BREAKPOINTS: \$10,000, \$25,000, \$100,000

ENTRY POINT: \$25,000

R088 BRANCHPOINT: IF R DID NOT SAY THAT DEBTS WERE REMOVED FROM THE HH BY A HH MEMBER LEAVING (R083 {NOT 2 and NOT 3}), GO TO R092



R088

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

[IWER: DO NOT PROBE DK/RF]

\_\_\_\_\_

AMOUNT

**GO TO R092**

R089-R091 Unfolding Sequence

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

PROCEDURE: 1Up1Down

BREAKPOINTS: \$5,000, **\$10,000**, \$25,000

ENTRY POINT: \$10,000

R092

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

**GO TO R097**

**GO TO R101 (R ASSIST)**

R093

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

[IWER: DO NOT PROBE DK/RF]

\_\_\_\_\_

AMOUNT

**GO TO R097  
BRANCHPOINT**

R094-R096 Unfolding Sequence

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

PROCEDURE: 1Up1Down

BREAKPOINTS: \$10,000, **\$25,000**, \$100,000

ENTRY POINT: \$25,000

**R097 BRANCHPOINT: IF R DID NOT SAY THAT DEBTS WERE ADDED TO THE HH BY A NEW HH MEMBER MOVING IN (R092 {NOT 2 and NOT 3}), GO TO R101 (R ASSIST)**

R097

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

[IWER: DO NOT PROBE DK/RF]

\_\_\_\_\_

AMOUNT

|

DK	RF
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**GO TO R101 (R ASSIST)**

R098-R100 Unfolding Sequence

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

PROCEDURE: 1Up1Down

BREAKPOINTS: \$5,000, **\$10,000**, \$25,000

ENTRY POINT: \$10,000

R101

R ASSIST

IWER: HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN SECTION R - ASSET CHANGE?

1. NEVER	2. A FEW TIMES	3. MOST OR ALL OF THE TIME	4. THE SECTION WAS DONE BY A PROXY REPORTER	5. NO QUESTIONS WERE ASKED
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**GO TO SECTION S**