NOTE ABOUT BRANCHPOINTS:

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

NOTE ABOUT COLORS:

ALL QUESTION TEXT IN BLACK IS FOR THE CORE INTERVIEW.

ALL QUESTION TEXT IN FUCHSIA IS FOR THE EXIT INTERVIEW. ALSO IN FUCHSIA IS ALL OTHER TEXT THAT IS SPECIFIC TO THE EXIT INTERVIEW BUT NOT TO THE CORE.

OTHERWISE, BLACK TEXT FOR CODEFRAMES, INTERVIEWER INSTRUCTIONS, JUMPS AND BRANCHPOINTS, ETC. CAN APPLY TO BOTH THE CORE AND THE EXIT INTERVIEW UNLESS SPECIFIED OTHERWISE OR THERE IS AN EXIT ALTERNATIVE.

ON A BLACK-AND-WHITE HARD COPY OF THE DOCUMENT, THE FUCHSIA TEXT WILL APPEAR SOMEWHAT LIGHTER THAN THE ORIGINAL BLACK.

NOTE ABOUT EXIT INTERVIEW Rs:

ANY NEW SPOUSE/PARTNER THAT AN EXIT INTERVIEW R ACQUIRED SINCE HIS/HER LAST INTERVIEW IS IGNORED FOR THE PURPOSES OF THIS INTERVIEW.
MAJOR FLOW CONTROL, CONDITION AND FILL VARIABLES *

THIS IS A NEW EXIT R (HAS NEVER BEFORE BEEN INTERVIEWED AS AN EXIT R: = {R DIED SINCE LAST IW or {R WAS REPORTED DEAD AT A PREVIOUS IW BUT EXIT IW HAS NEVER BEEN DONE FOR THIS R = NOT A POST-EXIT IW}}) (A007=5 and {Z145 {NOT 1 and NOT 2 and NOT 3 and NOT 4}})

THIS IS A NEW POST-EXIT INTERVIEW (Z145=2);
    THIS IS A FIRST REPEAT POST-EXIT INTERVIEW (Z145=3);
    THIS IS A SECOND REPEAT POST-EXIT INTERVIEW (Z145=4)

THIS IS A SELF INTERVIEW (A009=1);
    THIS IS A PROXY INTERVIEW (A009={2 or 3}) or (A009 NOT 1);
    PROXY REPORTER IS SURVIVING SPOUSE (A009=2);
    PROXY REPORTER IS NON-SPOUSE (A009=3)

R IS MARRIED (X065=1);
    R IS PARTNERED (X065=3);
    R IS OTHER (SINGLE) (X065=6)

R WAS MARRIED AT HH’s LAST IW (Preload X065=1);
    R WAS NOT COUPLED AT HH’s LAST IW (Preload X065 {NOT 1 and NOT 3})
    R WAS PARTNERED AT HH’s LAST IW (Preload X065=3);
    R WAS SINGLE AT HH’s LAST IW (Preload_X065=6)

R WAS MARRIED WHEN S/HE DIED (A026=1)

R’s LAST IW SPOUSE/PARTNER WAS LIVING WHEN S/HE DIED (A023=1);
    R’s LAST IW SPOUSE/PARTNER WAS NOT LIVING WHEN S/HE DIED (A023=5)

R’s FIRST NAME (per X058)

HH’s LAST IW MAIN RESIDENCE CITY (per X025), STATE (STATE ABBREVIATION) (per X026);
    HH’s LAST IW 2ND RESIDENCE CITY (per X029), STATE (STATE ABBREVIATION) (per X030)

R’s LAST IW MONTH (per Z092), YEAR (per 2093)

FINANCIAL R’s LAST IW MONTH (per X038), YEAR (per X039)

NUMBER OF CHILDREN OR STEP-CHILDREN (per A101);
    R HAS NO CHILDREN (A101=0)

FOR FAMILY R, NUMBER OF GRANDCHILDREN FOR CORE OR EXIT R (NOT POST-EXIT R) (per E046);
    FOR FAMILY R, NUMBER OF GRANDCHILDREN NOT ASKED BECAUSE ASSUMED TO BE ZERO (E046=95);
    FAMILY R HAS NO GRANDCHILDREN (E046 NOT {>0 - <81})

FOR NON-FAMILY R, NUMBER OF GRANDCHILDREN (per Z114)

R OWNED A MAIN RESIDENCE OR {MOBILE {HOME AND/OR SITE}) OR FARM AT R’s LAST IW (X079=1)
OWNED SECOND RESIDENCE AT HH’s LAST IW (X032 = 1)

ASK ABOUT DISPOSITION OF HOME ONLY (Z146=1);
ASK ABOUT WILL/TRUST ONLY (Z146=2);
ASK ABOUT BOTH HOME AND WILL/TRUST (Z146=3)

* 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.
!! WILLS--FAMILY

T001
Do you currently have a will that is written and witnessed?

1. YES, WILL
2. [VOL] YES, WILL AND TRUST
3. [VOL] NO WILL, BUT HAVE TRUST
5. NO WILL
8. DK
9. RF

GO TO T011

T002
Have you made provisions in your [will/will or trust/trust] for any family members other than your [husband/wife/partner]?

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

GO TO T008

T003 BRANCHPOINT: IF R DOES NOT HAVE CHILDREN OR STEP-CHILDREN (A101=0),
GO TO T006 BRANCHPOINT

T003
Does that include any of your children or step-children?

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

GO TO T006 BRANCHPOINT
T004/T050_T004
(Which child is that?)

[IWER: CHOOSE ALL THAT APPLY. IF ONLY ONE CHILD APPEARS, SELECT AND MOVE ON.]

<table>
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<td>93. ALL CHILDREN EQUALLY</td>
<td></td>
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<tr>
<td>96. ALL CHILDREN — &quot;EQUALLY&quot; NOT MENTIONED</td>
<td></td>
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<tr>
<td>98. DK</td>
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<tr>
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NOTE: NAMES OF ALL LIVING AND DEAD CHILDREN ARE DISPLAYED. NAMES OF SPOUSE/PARTNERS OF CHILDREN ARE NOT DISPLAYED.

T005 BRANCHPOINT: IF R REPORTED THAT MADE PROVISION FOR ALL CHILDREN EQUALLY (T004=93), GO TO T006 BRANCHPOINT

IF IWER MADE ONLY 1 SELECTION AT T004 and SELECTION AT T004 WAS NOT 96 ('ALL CHILDREN — "EQUALLY" NOT MENTIONED'),
GO TO T006 BRANCHPOINT

T005

Does that document provide for all your children about equally?

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

T006 BRANCHPOINT: IF (THIS IS A FAMILY R WHO DID NOT REPORT THAT HAD GRANDCHILDREN (E046 NOT {>0 - <81}) or THIS IS A NON-FAMILY R WHO WAS NOT REPORTED IN A PREVIOUS WAVE TO HAVE GRANDCHILDREN (Z114 NOT {>0 - <81})), GO TO T008

T006

Does that document include any grandchild directly?

1. YES  2. [VOL] ONLY THROUGH THEIR PARENTS  5. NO  8. DK  9. RF

GO TO T008
T007/T051_T007
(Which of your children is the parent of that grandchild?)

[IWER: CHOOSE ALL THAT APPLY]

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T008
Have you made provisions for any charities in your will or trust?

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

!! LIFE INSURANCE

T011
Do you have any life insurance, including individual or group policies?

[IWER: DO NOT INCLUDE BURIAL INSURANCE]

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

GO TO T036

T012
How many different life insurance policies do you have?

[IWER: INCLUDE INDIVIDUAL POLICIES, GROUP POLICIES, OR PAID-UP POLICIES IF R ASKS]

1. ONE  2. TWO  3. THREE  4. FOUR  5. FIVE OR MORE  8. DK  9. RF
T013
IF R HAS ONLY ONE LIFE INSURANCE POLICY (T012=1):
What is the total face value of this policy, that is, the amount of money the beneficiary would get if you were to die?

OTHERWISE:
Altogether, what is the total face value of these policies, that is, the amount of money the beneficiary would get if you were to die?

[IWER: DO NOT PROBE DK/RF]

AMOUNT

GO TO T017

T014-T016 Unfolding Sequence
Question text: Does it amount to less than $____ , more than $____ , or what?

PROCEDURES: 3Up, 2Up1Down, 1Up2Down
BREAKPOINTS: $2,500, $25,000, $50,000, $250,000
RANDOM ENTRY POINTS: $2,500, $25,000, $50,000
ENTRY POINT ASSIGNMENT 1 or 2 or {NOT 1 and NOT 2} AT Z087
ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

T017/T052 T017
IF R HAS ONLY ONE LIFE INSURANCE POLICY (T012=1):
Who are the beneficiaries of this policy?

OTHERWISE:
Who are the beneficiaries of these policies?

[IWER: CHOOSE ALL THAT APPLY]

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T018

[Is this a life insurance policy that builds/ Are any of these life insurance policies ones that build] up a cash value that you can borrow against, or that you would receive if the policy were to be cancelled?

DEFINITION: THESE ARE SOMETIMES CALLED ‘WHOLE LIFE’ OR ‘STRAIGHT LIFE POLICIES.’

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

GO TO T031

T019 BRANCHPOINT: IF R HAS ONLY ONE LIFE INSURANCE POLICY (T012=1), GO TO T024

T019

(How many such policies do you have?)

1. ONE  2. TWO  3. THREE  4. FOUR  5. FIVE OR MORE  8. DK  9. RF

T020

What is the current face value of [these policies/this policy]?

[IWER: DO NOT PROBE DK/RF]

AMOUNT

DK  RF

GO TO T024

T021-T023 Unfolding Sequence

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

PROCEDURES: 3Up, 2Up1Down, 1Up2Down
BREAKPOINTS: $2,500, $25,000, $50,000, $250,000
RANDOM ENTRY POINTS: $2,500, $25,000, $50,000
ENTRY POINT ASSIGNMENT 1 or 2 or {NOT 1 and NOT 2} AT Z087
ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND
T024
IF R HAS ONLY ONE LIFE INSURANCE POLICY (T019=1):
(Altogether,) about how much in total do you pay for this policy each
month or year?

OTHERWISE:
(Altogether,) about how much in total do you pay for these policies
each month or year?

[IWER: ENTER 0 IF PAID UP OR NO PREMIUM PAYMENTS]

---

AMOUNT

0  NO PREMIUM PAYMENTS  DK  RF

---

GO TO T025  GO TO T029 BRANCHPOINT

T026-T028 Unfolding Sequence

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

PROCEDURES: 2Up2Down, 1Up3Down
BREAKPOINTS: $20, $50, $100, $200, $400
RANDOM ENTRY POINTS: $100, $200
ENTRY POINT ASSIGNMENT 1 or {NOT 1} AT X501
ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

T025

PER:

1. MONTH  2. YEAR  8. DK  9. RF

---

T029 BRANCHPOINT: IF R HAS ONLY ONE LIFE INSURANCE POLICY (T012=1), GO TO T031
**T029/T053_T029**

**IF R HAS ONLY ONE LIFE INSURANCE POLICY (T019=1):**

Who are the beneficiaries of this policy?

**OTHERWISE:**

Who are the beneficiaries of these policies?

[IWER: CHOOSE ALL THAT APPLY]

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**!! NEW LIFE INSURANCE**

**T031**

[Since R’s LAST IW MONTH, YEAR/In the last 2 years], have you obtained any new life insurance policies?

<table>
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<th>1. YES</th>
<th>5. NO</th>
<th>8. DK</th>
<th>9. RF</th>
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GO TO T036
T032
What is the total face value of (this policy/all of these policies)?

[IWER: DO NOT PROBE DK/RF]

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GO TO T036

T033-T035 Unfolding Sequence
Question text: Does it amount to less than $____, more than $____, or what?

PROCEDURE: 2Up1Down
BREAKPOINTS: $2,500, $25,000, $50,000, $250,000
ENTRY POINT: $25,000

!! LAPPED LIFE INSURANCE

T036
[Since R’s LAST I.W. MONTH, YEAR/In the last 2 years], have you allowed any life insurance policies to lapse or have any been cancelled?

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

GO TO T245 BRANCHPOINT

T037
What was the total face value of (this policy/all of these policies)?

[IWER: DO NOT PROBE DK/RF]

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GO TO T041

T038-T040 Unfolding Sequence
Question text: Does it amount to less than $____, more than $____, or what?

PROCEDURE: 1Up2Down
BREAKPOINTS: $2,500, $25,000, $50,000, $250,000
ENTRY POINT: $50,000
T041 Was this lapse or cancellation something you chose to do, or was it
done by the provider, your employer, or someone else?

1. R’S CHOICE  2. PROVIDER/EMPLOYER/
SOMEONE ELSE CHOSE  8. DK  9. RF

GO TO T245 BRANCHPOINT

T042 Was it because the policy was too expensive, because you did not need
the coverage or some other reason?

1. TOO EXPENSIVE  2. COVERAGE NOT NEEDED  3. R GOT NEW POLICY
4. TAKE THE CASH OUT  7. OTHER (SPECIFY)  8. DK  9. RF

T245 (Tag#=T042.5)

T043 Did you receive any cash when the policy was cancelled or allowed to
lapse?

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

GO TO T245 BRANCHPOINT

T044 About how much cash did you receive?

____________ AMOUNT

DK  RF

T245 BRANCHPOINT: IF R IS LESS THAN 65 YEARS (A019<65), GO TO T047 (T ASSIST)

T245 EVER DISCUSSED MEDICAL CARE WITH ANYONE

Now we would like to ask you some questions about healthcare decisions
that might need to be made for you in the future, if you are unable to
make them yourself.

People sometimes make plans about the types of care or medical
treatment they would want or not want, if they were to become seriously
ill.
Have you ever discussed with anyone the care or medical treatment you would want to receive if you were to become seriously ill in the future?

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

T246

Have you made any legal arrangements for a specific person or persons to make decisions about your care or medical treatment if you can not make those decisions yourself? This is sometimes called a “Durable Power of Attorney for Health Care”.

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

GO TO T250

T247

Who has that authority, (that is, what is their relationship to you)?

[IWER: CHOOSE ALL THAT APPLY]

3. SPOUSE/ PARTNER  4. CHILD/CHILD-IN-LAW/GRANDCHILD

GO TO T248

5. OTHER RELATIVE  6. FRIEND  7. PHYSICIAN/HEALTHCARE PROFESSIONAL  8. MINISTER/RABBI/PRIEST/RELIGIOUS ADVISOR

9. ATTORNEY  10. SOCIAL WORKER  97. OTHER (SPECIFY)  98. DK  99. RF

GO TO T251

T248 BRANCHPOINT: GO TO T250
(Which child was that?)

IF GRANDCHILD:
(Which child is the parent of that grandchild?)

[IWER: CHOOSE ALL THAT APPLY]

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T249 BRANCHPOINT: IF R DID NOT SAY OTHER (SPECIFY) TO WHICH CHILD (T248 NOT 97), GO TO T250

T249
Who has that authority, (that is, what is their relationship to you)?

<table>
<thead>
<tr>
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OTHER RELATIONSHIP

T250
Have you provided written instructions about the care or medical treatment that you want to receive if you can not make those decisions yourself? This is sometimes called a “Living Will”.

<table>
<thead>
<tr>
<th>1. YES</th>
<th>5. NO</th>
<th>8. DK</th>
<th>9. RF</th>
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GO TO T047 (T ASSIST)

T251
Do these instructions express a desire to limit the care or medical treatment that you receive in certain situations?

<table>
<thead>
<tr>
<th>1. YES</th>
<th>5. NO</th>
<th>8. DK</th>
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T047

T ASSIST

IWER: HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN
SECTION T — WILLS AND TRUSTS?

| 1. NEVER | 2. A FEW TIMES | 3. MOST OR ALL OF THE TIME | 4. THE SECTION WAS DONE BY A PROXY REPORTER |
!! EXIT 1st HOME DISPOSAL – FIRST RESIDENCE

T101 BRANCHPOINT: IF THIS IS NOT AN EXIT INTERVIEW, GO TO SECTION U

IF THIS IS A POST-EXIT INTERVIEW (2145=(2 or 3 or 4)) and WE DON’T NEED TO ASK ABOUT THE HOME DISPOSITION (2146 (NOT 1 and NOT 3)), GO TO T155 BRANCHPOINT

IF THIS IS NOT A POST-EXIT IW (2145 (NOT 2 and NOT 3 and NOT 4)) and R DID NOT OWN RESIDENCE/MOBILE HOME/FARM IN HH’s LAST IW (X079 NOT 1), GO TO T124 BRANCHPOINT

T101

IF {R’s LAST IW SPOUSE/PARTNER WAS NOT LIVING WHEN S/HE DIED (A023 NOT 1) and PROXY IS NOT A SURVIVING SPOUSE/PARTNER (A009 NOT 2)} or R (WAS REMARRIED WHEN S/HE DIED (A026=1) and WAS NOT COUPLED AT HH’s LAST IW (Preload_X065 (NOT 1 and NOT 3)):
Our records show that R's FIRST NAME (per X058) owned a home in HH's LAST IW 1ST RESIDENCE CITY (X025), STATE (STATE ABBREVIATION) (X026) in [FINANCIAL R's LAST IW [MONTH (per X038), ]YEAR (per X038)/the last two years].

IF R WAS MARRIED/PARTNERED HH’s LAST IW (Preload_X065={1 or 3}) and PROXY IS R’s SURVIVING SPOUSE/PARTNER (A009=2):
Our records show that you and R's FIRST NAME owned a home in HH's LAST IW 1ST RESIDENCE CITY, STATE (STATE ABBREVIATION) in [FINANCIAL R's LAST IW [MONTH, ]YEAR/the last two years].

OTHERWISE, IF {THIS IS NOT A POST-EXIT AND R’s LAST IW SPOUSE/PARTNER WAS LIVING WHEN S/HE DIED (A023=1) and PROXY IS NOT A SURVIVING SPOUSE/PARTNER (A009 NOT 2)}:
Our records show that (R's FIRST NAME) and [his/her] [husband/wife/partner] owned a home in HH's LAST IW 1ST RESIDENCE CITY, STATE (STATE ABBREVIATION) in [FINANCIAL R's LAST IW [MONTH, ]YEAR/the last two years].

ASK ALL PROXIES:
Please, let me confirm, did R's FIRST NAME still own that home when [he/she] died?

1. YES
2. [VOL] RECORDS INCORRECT
5. NO
8. DK
9. RF

GO TO T111

GO TO T124 BRANCHPOINT
!! EXIT NO 1st HOME AT DEATH

T066 (Tag#=T101.5)
Did R's FIRST NAME ever own it?

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

GO TO T124 BRANCHPOINT

T102
What happened to that home — did R's FIRST NAME sell it, give it to someone, or what?

1. GAVE TO SOMEONE  2. SOLD  7. OTHER (SPECIFY)  8. DK  9. RF

GO TO T107

T104
To whom did [he/she] give the house, that is, what was their relationship to R's FIRST NAME?

[IWER: CHOOSE ALL THAT APPLY]

1. SPOUSE/PARTNER  2. CHILD/CHILD-IN-LAW  3. OTHER RELATIVE  4. FRIEND

5. CHARITY  6. GRANDCHILD  7. SOMEONE ELSE  8. DK  9. RF

T105 BRANCHPOINT: IF PROXY DID NOT REPORT THAT R GAVE THE HOUSE TO A CHILD/GRANDCHILD (T104 (NOT 2 and NOT 6)), GO TO T107
T105/T054_T105
IF CHILD (T104=2):
(Which child is that?)

IF GRANDCHILD (T104={6 and {NOT 2}}):
Which child is the parent of that grandchild?

[IWER: CHOOSE ALL THAT APPLY]

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T107
IF R SOLD THE HOME (T102=2)
What was the selling price?

OTHERWISE:
What was the value of that house? I mean, what would it have brought if it had been sold?

[IWER: DO NOT PROBE DK/RF]

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GO TO T124
BRANCHPOINT

T108-T110 Unfolding Sequence
Question text: Did it amount to a total of less than $___ , more than $____ , or what?

PROCEDURES: 1Up1Down, 2Down
BREAKPOINTS: $15,000, $50,000, $200,000
RANDOM ENTRY POINTS: $50,000, $200,000
ENTRY POINT ASSIGNMENT 1 or {NOT 1} AT X502
ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND
!! EXIT 1st HOME DISPOSAL AFTER DEATH

T111

What happened to that home after R's FIRST NAME's death:

IF PROXY IS THE SURVIVING SPOUSE/PARTNER (A009=2):
Do you own it now, was it sold, was it inherited by someone else, has it not yet been disposed of, or what?

IF (THIS IS NOT A POST-EXIT AND PROXY IS NOT R’s SPOUSE/PARTNER AND R’s SPOUSE/PARTNER IS STILL LIVING) (A023=1):
Does [his/her] [husband/wife/partner] own it now, was it sold, was it inherited by someone else, has it not yet been disposed of, or what?

OTHERWISE: Was it sold, was it inherited by someone else, has it not yet been disposed of, or what?

1. SURVIVING SPOUSE OR PARTNER STILL OWNS IT
2. SOLD
3. INHERITED
4. NOT YET DISPOSED

GO TO T124 BRANCHPOINT

GO TO T116

GO TO T120

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

T112

GO TO T124 BRANCHPOINT

!! EXIT 1st HOME INHERITED

T113

Who inherited the house, (that is, what was their relationship to R's FIRST NAME)?

[IWER: CHOOSE ALL THAT APPLY]

1. SPOUSE/PARTNER
2. CHILD/CHILD-IN-LAW
3. OTHER RELATIVE
4. FRIEND

5. CHARITY
6. GRANDCHILD
7. SOMEONE ELSE
8. DK
9. RF

T114 BRANCHPOINT: IF PROXY DID NOT REPORT THAT CHILD/GRANDCHILD INHERITED THE HOUSE (T113 {NOT 2 and NOT 6}), GO TO T116
T114/T055_T114

IF CHILD (T113=2):
(Which child is that?)

IF GRANDCHILD (T113={6 and {NOT 2}}):
Which child is the parent of that grandchild?

[IWER: CHOOSE ALL THAT APPLY]

<table>
<thead>
<tr>
<th>CHILD NAME(S)</th>
</tr>
</thead>
<tbody>
<tr>
<td>[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]</td>
</tr>
<tr>
<td>3. THROUGH 52. CHILD NAME(S)</td>
</tr>
<tr>
<td>[ROWS PROVIDED BY BLAISE AS NECESSARY]</td>
</tr>
<tr>
<td>92. DECEASED CHILD</td>
</tr>
<tr>
<td>93. ALL CHILDREN</td>
</tr>
<tr>
<td>97. OTHER (SPECIFY) [T115]</td>
</tr>
<tr>
<td>98. DK</td>
</tr>
<tr>
<td>99. RF</td>
</tr>
</tbody>
</table>

NOTE: NAMES OF ALL LIVING AND DEAD CHILDREN ARE DISPLAYED. NAMES OF SPOUSE/PARTNERS OF CHILDREN ARE NOT DISPLAYED.

!! EXIT 1st HOME SOLD

T116

IF R SOLD THE HOME (T111=2)
What was the selling price?

OTHERWISE:
What was the value of that house? I mean, what would it have brought if it had been sold?

[IWER: DO NOT PROBE DK/RF]

AMOUNT

DK       RF

GO TO T124 BRANCHPOINT

T117-T119 Unfolding Sequence

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

PROCEDURES: 1Up1Down, 2Down
BREAKPOINTS: $15,000, $50,000, $200,000
RANDOM ENTRY POINTS: $50,000, $200,000
ENTRY POINT ASSIGNMENT 1 or {NOT 1} AT X503
ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND
T120 BRANCHPOINT: GO TO T124 BRANCHPOINT
!! EXIT HOME NOT DISPOSED

T120
Is that home now vacant, or is someone living there?

1. VACANT
5. OCCUPIED
8. DK
9. RF

GO TO T124
BRANCHPOINT

GO TO T124
BRANCHPOINT

T121
Who lives in the house, (that is, what was their relationship to R's FIRST NAME)?

[IWER: CHOOSE ALL THAT APPLY]

1. SPOUSE/PARTNER
2. CHILD/CHILD-IN-LAW
3. OTHER RELATIVE
4. FRIEND

5. CHARITY
6. GRANDCHILD
7. SOMEONE ELSE
8. DK
9. RF

T122 BRANCHPOINT: IF PROXY DID NOT REPORT THAT CHILD/GRANDCHILD LIVES IN HOUSE (T121 {NOT 2 and NOT 6}), GO TO T124 BRANCHPOINT

T122/T056 T122
IF CHILD (T121=2):
(Which child is that?)

IF GRANDCHILD (T121={6 and {NOT 2}}):
Which child is the parent of that grandchild?

[IWER: CHOOSE ALL THAT APPLY]

<table>
<thead>
<tr>
<th>CHILD NAME(S)</th>
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</thead>
<tbody>
<tr>
<td>[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]</td>
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<td>3. THROUGH 52. CHILD NAME(S)</td>
</tr>
<tr>
<td>[ROWS PROVIDED BY BLAISE AS NECESSARY]</td>
</tr>
</tbody>
</table>

92. DECEASED CHILD
93. ALL CHILDREN
97. OTHER (SPECIFY) [T123]
98. DK
99. RF

NOTE: NAMES OF ALL LIVING AND DEAD CHILDREN ARE DISPLAYED. NAMES OF SPOUSE/PARTNERS OF CHILDREN ARE NOT DISPLAYED.
!! EXIT HOME DISPOSAL – SECOND RESIDENCE

**T124 BRANCHPOINT:** IF THIS IS A POST-EXIT INTERVIEW ($Z145=2$ or $3$ or $4$),
GO TO T155 BRANCHPOINT

IF R DID NOT HAVE A SECOND RESIDENCE AT HH’s LAST IW
($X032 \text{ NOT 1}$), GO TO T148

**T124**

IF (R’s LAST IW SPOUSE/PARTNER WAS NOT LIVING WHEN S/HE DIED ($A023 \text{ NOT 1}$) and PROXY IS NOT A SURVIVING SPOUSE/PARTNER ($A009 \text{ NOT 2}$)) or R (WAS REMARRIED WHEN S/HE DIED ($A026=1$) and WAS NOT COUPLED AT HH’s LAST IW
(Preload_ $X065 \text{ NOT 1 and NOT 3}$):
Our records show that R’s FIRST NAME owned a home in HH’s LAST IW
2ND RESIDENCE CITY, STATE (STATE ABBREVIATION) [since [FINANCIAL R’S
LAST IW [MONTH, ]YEAR/in the last two years before [his/her] death].

IF R WAS MARRIED/PARTNERED AT HH’s LAST IW (Preload_ $X065=(1$ or $3)$) and
PROXY IS R’s SURVIVING SPOUSE/PARTNER ($A009=2$):
IF PROXY IS THE SURVIVING SPOUSE/PARTNER ($A009=2$):
Our records show that you and R’s FIRST NAME owned a home in HH’s
LAST IW 2ND RESIDENCE CITY ($X029$), STATE (STATE ABBREVIATION) ($X030$)
[since [FINANCIAL R’S LAST IW [MONTH, ]YEAR/in the last two years
before [his/her] death].

OTHERWISE, IF R’S LAST IW SPOUSE/PARTNER WAS LIVING WHEN S/HE DIED
(A023=1) and PROXY IS NOT A SURVIVING SPOUSE/PARTNER
(A009 NOT 2):
Our records show that R’s FIRST NAME and [his/her]
[husband/wife/partner] owned a home in HH’s LAST IW 2ND RESIDENCE
CITY, STATE (STATE ABBREVIATION) [since [FINANCIAL R’S LAST IW
[MONT, ]YEAR/in the last two years before [his/her] death].

ASK ALL PROXY:
Remind me, did [he/she] still own that home when [he/she] died?

1. YES
2. [VOL] RECORDS INCORRECT
5. NO
8. DK
9. RF

GO TO T135

GO TO T148
!! EXIT 2ND HOME DISPOSED BEFORE DEATH

T125
Did R’s FIRST NAME ever own it?

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

GO TO T148

T240 (Tag#=T126)
What happened to that home — did R’s FIRST NAME sell it, give it to someone, or what?

1. GAVE TO SOMEONE  2. SOLD  7. OTHER (SPECIFY)  8. DK  9. RF

T241 (Tag#=T127)

GO TO T131

GO TO T148

!! EXIT 2ND HOME INHERITED BEFORE DEATH

T128
To whom did [he/she] give the house, (that is, what was their relationship to R’s FIRST NAME)?

[IWER: CHOOSE ALL THAT APPLY]

1. SPOUSE/PARTNER  2. CHILD/CHILD-IN-LAW  3. OTHER RELATIVE  4. FRIEND

5. CHARITY  6. GRANDCHILD  7. SOMEONE ELSE  8. DK  9. RF

T129 BRANCHPOINT: IF PROXY DID NOT REPORT THAT CHILD/GRANDCHILD LIVES IN HOUSE (T128 (NOT 2 and NOT 6)), GO TO T131
T129/T057_T129

IF CHILD (T128=2):
(Which child is that?)

IF GRANDCHILD (T128={6 and (NOT 2)}):
Which child is the parent of that grandchild?

[IWER: CHOOSE ALL THAT APPLY]

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<tr>
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<td>92. DECEASED CHILD</td>
</tr>
<tr>
<td>93. ALL CHILDREN</td>
</tr>
<tr>
<td>97. OTHER (SPECIFY) [T130]</td>
</tr>
<tr>
<td>98. DK</td>
</tr>
<tr>
<td>99. RF</td>
</tr>
</tbody>
</table>

NOTE: NAMES OF ALL LIVING AND DEAD CHILDREN ARE DISPLAYED. NAMES OF SPOUSE/PARTNERS OF CHILDREN ARE NOT DISPLAYED.

!! EXIT 2ND HOME SOLD BEFORE DEATH

T131

IF R SOLD THE HOME (T240=2):
What was the selling price?

OTHERWISE:
What was the value of that house? I mean, what would it have brought if it had been sold?

[IWER: DO NOT PROBE DK/RF]

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

GO TO T148

T132-T134 Unfolding Sequence

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

PROCEDURES: 1Up1Down, 2Down
BREAKPOINTS: $15,000, $50,000, $200,000
RANDOM ENTRY POINTS: $50,000, $200,000
ENTRY POINT ASSIGNMENT 1 or (NOT 1) AT X504
ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND
T135 BRANCHPOINT: GO TO T148

!! EXIT 2ND HOME DISPOSAL AFTER DEATH

T135

What happened to that home after R's FIRST NAME's death:

IF PROXY IS THE SURVIVING SPOUSE/PARTNER (A009=2):
Do you own it now, was it sold, was it inherited by someone else, has it not yet been disposed of, or what?

IF {PROXY IS NOT R’s SPOUSE/PARTNER AND R’s SPOUSE/PARTNER WAS STILL LIVING WHEN S/HE DIED} (A023=1):
Does [his/her] [husband/wife/partner] own it now, was it sold, was it inherited by someone else, has it not yet been disposed of, or what?

OTHERWISE:
Was it sold, was it inherited by someone else, has it not yet been disposed of, or what?

1. SURVIVING SPOUSE STILL OWNS IT
2. SOLD
3. INHERITED
4. NOT YET DISPOSED

GO TO T148
GO TO T140
GO TO T144

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

T136

GO TO T148

!! EXIT 2ND HOME INHERITED

T137

Who inherited the house, (that is, what was their relationship to R’s FIRST NAME)?

[IWER: CHOOSE ALL THAT APPLY]

1. SPOUSE/PARTNER
2. CHILD/CHILD-IN-LAW
3. OTHER RELATIVE
4. FRIEND

5. CHARITY
6. GRANDCHILD
7. SOMEONE ELSE
8. DK
9. RF

T138 BRANCHPOINT: IF PROXY DID NOT REPORT THAT CHILD/GRANDCHILD INHERITED HOUSE (T137 {NOT 2 and NOT 6}), GO TO T140
T138/T058 T137
IF CHILD (T137=2):
(Which child is that?)

IF GRANDCHILD (T137={6 and (NOT 2)}):
Which child is the parent of that grandchild?

[IWER: CHOOSE ALL THAT APPLY]

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<tr>
<td>92. DECEASED CHILD</td>
</tr>
<tr>
<td>93. ALL CHILDREN</td>
</tr>
<tr>
<td>97. OTHER (SPECIFY) [T139]</td>
</tr>
<tr>
<td>98. DK</td>
</tr>
<tr>
<td>99. RF</td>
</tr>
</tbody>
</table>

NOTE: NAMES OF ALL LIVING AND DEAD CHILDREN ARE DISPLAYED. NAMES OF SPOUSE/PARTNERS OF CHILDREN ARE NOT DISPLAYED.

!! EXIT 2ND HOME SOLD

T140
IF R SOLD THE HOME (T135=2):
What was the selling price?

OTHERWISE:
What was the value of that house? I mean, what would it have brought if it had been sold?

[IWER: DO NOT PROBE DK/RF]

| AMOUNT | DK | RF |

GO TO T148

T141-T143 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

T144 BRANCHPOINT: GO TO T148
!! EXIT 2ND HOME NOT DISPOSED YET

T144
Is that home now vacant, or is someone living there?

1. VACANT     5. OCCUPIED     8. DK     9. RF

GO TO T148    GO TO T148

T145
Who lives in the house, (that is, what was their relationship to R’s FIRST NAME)?

[IWER: CHOOSE ALL THAT APPLY]

1. SPOUSE/PARTNER     2. CHILD/CHILD-IN-LAW     3. OTHER RELATIVE     4. FRIEND

5. CHARITY     6. GRANDCHILD     7. SOMEONE ELSE     8. DK     9. RF

T146 BRANCHPOINT: IF PROXY DID NOT REPORT THAT CHILD/GRANDCHILD LIVES IN HOUSE (T145 {NOT 2 and NOT 6}), GO TO T148

T146/T059 T146
IF CHILD (T145=2):
(Which child is that?)

IF GRANDCHILD (T145={6 and {NOT 2}}):
Which child is the parent of that grandchild?

[IWER: CHOOSE ALL THAT APPLY]

CHILD NAME(S)
[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]

3. THROUGH 52. CHILD NAME(S)
[ROWS PROVIDED BY BLAISE AS NECESSARY]

92. DECEASED CHILD
93. ALL CHILDREN
97. OTHER (SPECIFY) [T147]
98. DK
99. RF

NOTE: NAMES OF ALL LIVING AND DEAD CHILDREN ARE DISPLAYED. NAMES OF SPOUSE/PARTNERS OF CHILDREN ARE NOT DISPLAYED.
!! EXIT DEATH EXPENSES

T148
I asked you earlier about expenses incurred for the health care that
R's FIRST NAME received. Now I want to know about expenses associated
with [his/her] death, for funeral expenses, legal fees, and so on.

What were the total expenses associated with the death for things of
that type?

[IWER: DO NOT PROBE DK/RF]

[IWER: ENTER 99996 IF NOT SETTLED YET]

<table>
<thead>
<tr>
<th>AMOUNT</th>
<th>99996 NOT SETTLED YET</th>
<th>0</th>
<th>DK</th>
<th>RF</th>
</tr>
</thead>
</table>

GO TO T152

GO TO T155 BRANCHPOINT

T149-T151 Unfolding Sequence
Question text: Did it amount to less than $____ , more than $____ , or
what?

PROCEDURES: 2Up1Down, 1Up2Down
BREAKPOINTS: $1,000, $5,000, $25,000, $100,000
RANDOM ENTRY POINTS: $5,000, $25,000
ENTRY POINT ASSIGNMENT 1 or {NOT 1} AT X505
ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

T152
Excluding life insurance, were any of these costs covered by insurance?

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

GO TO T155 BRANCHPOINT

T153
How much did insurance pay?

OR

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

T153

<table>
<thead>
<tr>
<th>PERCENT</th>
</tr>
</thead>
</table>
Sometimes people make provisions to leave things to specific family members if something happens to them, others do not. Because we are trying to get a complete picture of family situations, I have a few questions about inheritance.

Before [his/her] death, had **R's FIRST NAME** put any of [his/her] assets into a trust?

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

**T156**

If R put assets into trust (T155=1):
In addition to the trust, did **R's FIRST NAME** have a will that was written and witnessed?

Otherwise:
Did **R's FIRST NAME** have a will that was written and witnessed?

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

**GO TO T161 BRANCHPOINT**

**T157**

Has [his/her] will been probated?

1. YES  2. [VOL] NO: PROBATE NOT NEEDED  3. [VOL] NO: NO ASSETS REMAINED TO BE PROBATED

**GO TO T161 BRANCHPOINT**

4. [VOL] NO: ALL ASSETS WERE HELD IN JOINT TENANCY OR IN A TRUST  5. NO

**GO TO T161 BRANCHPOINT**

7. [VOL] R DISPUTES RECORD  8. DK  9. RF

**GO TO T161 BRANCHPOINT**
In what state was it probated?

T158
OTHER COUNTRY (SPECIFY)  98. DK  99. RF

T159
STATE

GO TO T161 BRANCHPOINT

GO TO T161 BRANCHPOINT

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

In what county was it probated?

T160
COUNTY  98. DK  99. RF

T161 BRANCHPOINT: IF R HAD (A TRUST OR A PROBATED WILL) ((T155 or T157)=1), GO TO T163 LOOP BRANCHPOINT

!! EXIT DISTRIBUTION OF ASSETS

The next questions are about R's FIRST NAME's assets and possessions, excluding any life insurance.

Have they been divided up among the heirs, have they not yet been distributed, was there nothing of much value to distribute, or what?

1. DIVIDED AMONG THE HEIRS, OR RETAINED BY THOSE WITH JOINT TENANCY  2. NOT YET DISTRIBUTED

3. NOTHING MUCH OF VALUE  7. OTHER (SPECIFY)  8. DK  9. RF

T162

T163 LOOP BRANCHPOINT: IF R HAD NEITHER A TRUST NOR A PROBATED WILL ((T155 and T157) NOT 1) and ((ASSETS/POSSESSIONS WERE NOT DIVIDED AMONG HEIRS and THE RESPONSE WAS NOT OTHER (SPECIFY)) (T161 (NOT 1 and NOT 7)), GO TO T177 BRANCHPOINT

IF R WAS NOT PART OF A COUPLE (X065 (NOT 1 and NOT 3)), GO TO T164 BRANCHPOINT
**T163 THROUGH T908-8 ARE ASKED FOR POTENTIAL BENEFICIARIES OF R’s ESTATE.**

**T163**

IF R HAD {A TRUST and/or A WILL} ({T155 and T156}=1 or T155=1 or T156=1):

Did [he/she] make provisions in [either the trust or the will/the trust/the will] for [you/[[his/her] [husband/wife/partner]]]?

OTHERWISE:

Were any of [his/her] possessions or assets left to [you/[[his/her] [husband/wife/partner]]]?

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

**GO TO T164 BRANCHPOINT**

***BEGINNING OF BLOCK_1: AMOUNT TO SPOUSE/PARTNER***

(T902_1 - T908_1)

**T902_1**

Excluding any life insurance, how much did [you/[[his/her] [husband/wife/partner]]] receive from [his/her] estate?

[IWER: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE]

[IWER: DO NOT PROBE DK/RF]

OR

DK   RF

T902_1

AMOUNT

T903_1

PERCENT

**GO TO T164 BRANCHPOINT**

**T904_1**

Was it more than half of [his/her] estate?

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

**GO TO T907_1**

**GO TO T164 BRANCHPOINT**

**T905_1**

Was it more than 75 percent of [his/her] estate?

1. YES   5. NO   8. DK   9. RF
T906_1
Was it more than 90 percent of [his/her] [his/her] estate?

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

GO TO T164 BRANCHPOINT

T907_1
Was it more than 25 percent of [his/her] estate?

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

GO TO T164 BRANCHPOINT

GO TO T164 BRANCHPOINT

T908_1
Was it more than 10 percent of [his/her] estate?

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

***END OF BLOCK_1: AMOUNT TO SPOUSE/PARTNER (T902_1 - T908_1)

T164 BRANCHPOINT: IF R DOES NOT HAVE ANY CHILDREN (A101=0) and (\{THIS IS A NEW EXIT IW (A007=5 and (Z145 (NOT 2 and NOT 3 and NOT 4)))\} and \{PROXY DID NOT REPORT THAT R HAD GRANDCHILDREN (E046 NOT (>0 - <81)))\}) or (\THIS IS A POST-EXIT IW (Z145=(2 or 3 or 4)) and R WAS NOT REPORTED IN A PREVIOUS WAVE TO HAVE GRANDCHILDREN (Z114 NOT (>0 - <81)))\}, GO TO T168
T164

IF R HAD {A TRUST and/or A WILL} {(T155 and T156)=1 or T155=1 or T156=1):
(Again,) excluding any life insurance, did [he/she] make provisions in
[either the trust or the will/the trust/the will] for any of [his/her]
[children or grandchildren (or great-grandchildren)/
children/grandchildren (or great-grandchildren)]?

OTHERWISE:
(Again,) excluding any life insurance, were any of [his/her] possessions
or assets left to any of [his/her] [children or grandchildren (or great-
grandchildren)/children/grandchildren (or great-grandchildren)]?

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

GO TO T168

T165 BRANCHPOINT: IF R DOES NOT HAVE ANY CHILDREN (A101=0), GO TO T166
BRANCHPOINT

IF R HAS ONLY ONE CHILD (A101=1), GO TO T902_2

T165

Did R’s FIRST NAME provide equally for all of [his/her] children and
their families?

[IWER: WE ARE INTERESTED IN THE TOTAL AMOUNT GIVEN TO EACH OF R’S
CHILDREN AND THEIR SPOUSES AND CHILDREN.]

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

GO TO T902_2  GO TO BEGINNING OF
T902_3 LOOP

T166 BRANCHPOINT: IF R HAS/HAD ONLY ONE GRANDCHILD (E046=1 or Z114=1), ASSIGN 1
TO T166 AND GO TO T902_2

T166

Did [he/she] leave the same amount to each of [his/her] grandchildren?

1. YES  5. NO  8. DK  9. RF
***BEGINNING OF BLOCK_2: SAME AMOUNT TO ALL CHILDREN
(T902_2 - T908_2)

T902_2
IF R LEFT EQUAL AMOUNTS TO EACH (CHILD AND FAMILY) (T165=1):
Altogether, how much did [he/she] leave for [his/her] children and their families?

IF R HAS ONLY 1 CHILD (A101=1):
Altogether, how much did [he/she] leave for [his/her] child and (his/her) family?

IF {PROXY WAS ASKED WHETHER R LEFT EQUAL AMOUNTS TO GRANDCHILDREN or VALUE WAS ASSIGNED} (T166 NOT EMPTY):
Altogether, how much did [he/she] leave for [his/her] (grandchild/grandchildren)?

[IWER: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE]
[IWER: DO NOT PROBE DK/RF]

OR

T902_2 AMOUNT
T903_2 PERCENT

GO TO T168

T904_2
Was it more than half of [his/her] estate?

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

GO TO T907_2  GO TO T168

T905_2
Was it more than 75 percent of [his/her] estate?

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

GO TO T168

T906_2
Was it more than 90 percent of [his/her] estate?

1. YES  5. NO  8. DK  9. RF
T907_2
  Was it more than 25 percent of [his/her] estate?
  1. YES  5. NO  8. DK  9. RF
  GO TO T168  GO TO T168

T908_2
  Was it more than 10 percent of [his/her] estate?
  1. YES  5. NO  8. DK  9. RF
  GO TO T168

***END OF BLOCK_2: SAME AMOUNT TO ALL CHILDREN (T902_2 - T908_2)

T902_3 LOOP BRANCHPOINT: GO TO T168

***BEGINNING OF T902_3 LOOP: ESTATE DISPERSAL TO EACH CHILD
  T902_2 - T908_2 ARE ASKED FOR EACH CHILD

***BEGINNING OF BLOCK_3: AMOUNT TO EACH CHILD
  (T902_3 - T908_3)

NOTE: THIS BLOCK IS REPEATED FOR EACH CHILD LISTED FOR A HOUSEHOLD.

T902_3
  (Excluding any life insurance,) how much did [he/she] leave for
  CHILDn’s NAME and (his/her) family?
  [IWER: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE]
  [IWER: DO NOT PROBE DK/RF]
  OR
  T902_3 AMOUNT  T903_3 PERCENT
  GO TO END OF T902_3 LOOP
  (AFTER T908_3)
**T904_3**
Was it more than half of [his/her] estate?

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

GO TO T907_3  
GO TO END OF T902_3 LOOP (AFTER T908_3)

**T905_3**
Was it more than 75 percent of [his/her] estate?

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

GO TO END OF T902_3 LOOP (AFTER T908_3)

**T906_3**
Was it more than 90 percent of [his/her] estate?

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

GO TO END OF T902_3 LOOP (AFTER T908_3)

**T907_3**
Was it more than 25 percent of [his/her] estate?

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

GO TO END OF T902_3 LOOP (AFTER T908_3)  
GO TO END OF T902_3 LOOP (AFTER T908_3)

**T908_3**
Was it more than 10 percent of [his/her] estate?

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

***END OF BLOCK_3: AMOUNT TO EACH CHILD (T902_3 - T908_3)***

***END OF T902_3 LOOP: ESTATE DISPERSAL TO EACH CHILD***

IF THERE ARE NO MORE CHILDREN, CONTINUE ON TO T168. OTHERWISE, GO BACK TO BEGINNING OF T902_3 LOOP
T168
IF R HAD {A TRUST and/or A WILL} (T155 and T156)=1 or T155=1 or T156=1:
(Excluding any life insurance,) did [he/she] make provisions in [either the trust or the will/the trust/the will] for charities?

OTHERWISE:
(Excluding any life insurance,) were any of [his/her] possessions or assets left to charities?

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

GO TO T169

***BEGINNING OF BLOCK_4: AMOUNT TO CHARITIES
(T902_4 - T908_4)

T902_4
How much did charities receive from [his/her] estate?
[IWER: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE]
[IWER: DO NOT PROBE DK/RF]

<table>
<thead>
<tr>
<th>AMOUNT</th>
<th>PERCENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>T902_4</td>
<td>T903_4</td>
</tr>
</tbody>
</table>

GO TO T169

T904_4
Was it more than half of [his/her] estate?

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

GO TO T907_4  GO TO T169

T905_4
Was it more than 75 percent of [his/her] estate?

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

GO TO T169
T906_4
Was it more than 90 percent of [his/her] estate?

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

GO TO T169

T907_4
Was it more than 25 percent of [his/her] estate?

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

GO TO T169

T908_4
Was it more than 10 percent of [his/her] estate?

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

***END OF BLOCK_4: AMOUNT TO CHARITIES (T902_4 - T908_4)

T169
IF R HAD {A TRUST and/or A WILL} ({T155 and T156}=1 or T155=1 or T156=1):
(Excluding any life insurance,) did [he/she] make provisions in [either the trust or the will/the trust/the will] for any of [his/her] brothers or sisters??

OTHERWISE:
(Excluding any life insurance,) were any of [his/her] possessions or assets left to any of [his/her] brothers or sisters??

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

GO TO T170
***BEGINNING OF BLOCK_5: AMOUNT TO SIBLINGS (T902_5 - T908_5)

T902_5
Altogether, how much did [his/her] brothers and sisters receive from [his/her] estate?
[IWER: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE]
[IWER: DO NOT PROBE DK/RF]

T902_5 AMOUNT

T903_5 PERCENT

GO TO T170

T904_5
Was it more than half of [his/her] estate?

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

GO TO T907_5
GO TO T170

T905_5
Was it more than 75 percent of [his/her] estate?

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

GO TO T170

T906_5
Was it more than 90 percent of [his/her] estate?

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

GO TO T170

T907_5
Was it more than 25 percent of [his/her] estate?

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

GO TO T170
GO TO T170
T908_5
Was it more than 10 percent of [his/her] estate?

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

***END OF BLOCK_5: AMOUNT TO SIBLINGS (T902_5 – T908_5)

T170
IF R HAD {A TRUST and/or A WILL} (T155 and T156)=1 or T155=1 or T156=1):
(Excluding any life insurance,) did [he/she] make provisions in [either the trust or the will/the trust/the will] for any other of [his/her] relatives?

OTHERWISE:
Excluding any life insurance,) were any of [his/her] possessions or assets left to any other of [his/her] relatives?

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

GO TO T171

***BEGINNING OF BLOCK_6: AMOUNT TO OTHER RELATIVES (T902_6 – T908_6)

T902_6
Altogether, how much did these other relatives receive from [his/her] estate?

[IWER: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE]

[IWER: DO NOT PROBE DK/RF]

OR

T902_6
AMOUNT

T903_6
PERCENT

GO TO T171

T904_6
Was it more than half of [his/her] estate?

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

GO TO T907_6  GO TO T171
T905_6
Was it more than 75 percent of [his/her] estate?

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

GO TO T171

T906_6
Was it more than 90 percent of [his/her] estate?

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

GO TO T171

T907_6
Was it more than 25 percent of [his/her] estate?

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

GO TO T171

T908_6
Was it more than 10 percent of [his/her] estate?

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

***END OF BLOCK_6: AMOUNT TO OTHER RELATIVES  (T902_6 - T908_6)

T171
IF R HAD {A TRUST and/or A WILL} ({T155 and T156}=1 or T155=1 or
T156=1):
(Excluding any life insurance,) did [he/she] make provisions in [either
the trust or the will/the trust/the will] for any of [his/her] friends?

OTHERWISE:
Excluding any life insurance,) were any of [his/her] possessions or
assets left to any of [his/her] friends?

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

GO TO T172
***BEGINNING OF BLOCK_7: AMOUNT TO FRIENDS (T902_7  - T908_7)

T902_7
Altogether, how much did [his/her] friends receive from [his/her] estate?

[IWER: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE]

[IWER: DO NOT PROBE DK/RF]

_________ OR ___________  DK  RF

T902_7  T903_7
AMOUNT  PERCENT

GO TO T172

T904_7
Was it more than half of [his/her] estate?

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

GO TO T907_7  GO TO T172

T905_7
Was it more than 75 percent of [his/her] estate?

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

GO TO T172

T906_7
Was it more than 90 percent of [his/her] estate?

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

GO TO T172

T907_7
Was it more than 25 percent of [his/her] estate?

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

GO TO T172  GO TO T172
T908_7
Was it more than 10 percent of [his/her] estate?

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

***END OF BLOCK_7: AMOUNT TO FRIENDS  (T902_7 - T908_7)

T172
IF R HAD {A TRUST and/or A WILL} ({T155 and T156}=1 or T155=1 or T156=1):
(Excluding any life insurance,) did [he/she] make provisions in [either the trust or the will/the trust/the will] for anyone else or anything else that we have not yet listed?

OTHERWISE:
Excluding any life insurance,) were any of [his/her] possessions or assets left to anyone else or anything else that we have not yet listed?

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

GO TO T173

***BEGINNING OF BLOCK_8: AMOUNT TO OTHERS  (T902_8 - T908_8)

T902_8
Altogether, how much did those others receive from [his/her] estate?

[IWER: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE]

[IWER: DO NOT PROBE DK/RF]

OR

T902_8
AMOUNT

T903_8
PERCENT

GO TO T173

T904_8
Was it more than half of [his/her] estate?

1. YES  5. NO  8. DK  9. RF
T905_8
Was it more than 75 percent of [his/her] estate?

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

GO TO T173
**T906_8**

Was it more than 90 percent of [his/her] estate?

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

GO TO T173

**T907_8**

Was it more than 25 percent of [his/her] estate?

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

GO TO T173

**T908_8**

Was it more than 10 percent of [his/her] estate?

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

***END OF BLOCK_8: AMOUNT TO OTHERS (T902_8 - T908_8)***

***END OF T163 ESTATE DISPERSAL LOOP: CONTINUE ON TO T173.***
!! EXIT VALUE OF ESTATE

T173
Excluding any life insurance, altogether what was the value of [his/her] total estate?

[IWER: DO NOT PROBE DK/RF]

AMOUNT

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

GO TO T242 BRANCHPOINT

T174-T176 Unfolding Sequence
Question text: Did it amount to a total of less than $____, more than $____, or what?

PROCEDURES: 3Up1Down, 2Up2Down, 1Up3Down
BREAKPOINTS: $10,000, $25,000, $100,000, $500,000, $2,000,000
RANDOM ENTRY POINTS: $25,000, $100,000, $500,000
ENTRY POINT ASSIGNMENT [1 ($100,000)] or [2 ($25,000)] or
[(NOT 1 and NOT 2) ($500,000)] AT X511

T242 BRANCHPOINT: IF THIS IS A POST-EXIT INTERVIEW (Z145={2 or 3 or 4}) and PROXY DID NOT SAY R STILL OWNED HOME AT TIME OF DEATH (T101 NOT 1), GO TO END OF INTERVIEW

 IF THIS IS NOT A POST-EXIT IW (Z145 {NOT 2 and NOT 3 and NOT 4})) and R DID NOT OWN RESIDENCE/MOBILE HOME/FARM IN HH’s LAST IW (X079 NOT 1), GO TO T177

T242 (Tag#=T176.5)
Does that include the value of the home?

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

T177 BRANCHPOINT: IF THIS IS A POST-EXIT INTERVIEW (Z145=(2 or 3 or 4)), GO TO END OF INTERVIEW
!! EXIT ESTATE IN TRUST

T177
IF R PUT ASSETS INTO TRUST (T155=1):
Is any part of [his/her] estate still held in any type of a trust?

OTHERWISE:
Was any part of [his/her] estate put into a trust after [he/she] died?

1. YES  5. NO  8. DK  9. RF
  
  GO TO T181 BRANCHPOINT

T178
Who is currently the trustee of this trust?

[IWER: CHOOSE ALL THAT APPLY]

DEFINITION: A TRUSTEE IS A PERSON WHO ADMINISTERS OR MANAGES THE
TRUST.

1. SPOUSE/PARTNER  2. CHILD/CHILD-IN-LAW  3. OTHER RELATIVE  4. ATTORNEY

5. BANK OFFICER/TRUSTDEPARTMENT AT A BANK  6. GRANDCHILD  7. OTHER
(SPECIFY)

T179

T180 BRANCHPOINT: IF PROXY DID NOT REPORT THAT TRUSTEE IS A CHILD/GRANDCHILD
(T178 (NOT 2 and NOT 6)), GO TO T181 BRANCHPOINT
T180/T065_T180

IF CHILD (T178=2):
(Which child is that?)

IF GRANDCHILD (T178={6 and (NOT 2)}):
Which child is the parent of that grandchild?

[IWER: CHOOSE ALL THAT APPLY]

<table>
<thead>
<tr>
<th>CHILD NAME(S)</th>
</tr>
</thead>
<tbody>
<tr>
<td>[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]</td>
</tr>
<tr>
<td>3. THROUGH 52. CHILD NAME(S)</td>
</tr>
<tr>
<td>[ROWS PROVIDED BY BLAISE AS NECESSARY]</td>
</tr>
<tr>
<td>92. DECEASED CHILD</td>
</tr>
<tr>
<td>97. OTHER (SPECIFY) [T238]</td>
</tr>
<tr>
<td>98. DK</td>
</tr>
<tr>
<td>99. RF</td>
</tr>
</tbody>
</table>

NOTE: NAMES OF ALL LIVING AND DEAD CHILDREN ARE DISPLAYED. NAMES OF SPOUSE/PARTNERS OF CHILDREN ARE NOT DISPLAYED.

!! EXIT LIFE INSURANCE SETTLEMENT

T181

IF R HAD {A TRUST or A WILL} (T155=1 or T156=1) or THE WILL HAS BEEN PROBATED (T157=1) or {ASSETS AND POSSESSIONS} WERE DIVIDED AMONG THE HEIRS (T161=1):
In addition to what you have just told me about [his/her] estate did anyone receive a settlement from life insurance?

OTHERWISE:
Did anyone receive a settlement from life insurance?

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

GO TO T190
Who were the beneficiaries of that life insurance?

[IWER: CHOOSE ALL THAT APPLY]

1. SPOUSE/PARTNER
2. CHILD(REN)
3. GRANDCHILD(REN) OR GREAT-GRANDCHILD(REN)
4. OTHER RELATIVE(S)
7. OTHER (SPECIFY)
8. DK
9. RF

T184 BRANCHPOINT: IF PROXY (DID NOT REPORT THAT BENEFICIARY IS CHILD(REN) and DID NOT REPORT THAT IS GRANDCHILD(REN)) (T182 {NOT 2 and NOT 3}), GO TO T902_11 BRANCHPOINT

IF R HAS ONLY ONE CHILD (A101=1), GO TO BEGINNING OF T902_10 LOOP

Did each of [his/her] children and their families receive the same amount from life insurance?

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

GO TO BEGINNING OF T902_10 LOOP

***BEGINNING OF T902_9 LOOP: LIFE INSURANCE DISPERSAL
T902_9 THROUGH T908_13 ARE ASKED ABOUT ALL CHILD BENEFICIARIES OF R’s LIFE INSURANCE COMBINED.

***BEGINNING OF BLOCK_9: LIFE INSURANCE: SAME AMOUNT TO ALL CHILDREN
(T902_9 - T908_9)

Altogether, how much did [his/her] children receive from [his/her] life insurance?

[IWER: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE]

[IWER: DO NOT PROBE DK/RF]

__________________ OR __________________

T902_9 AMOUNT
T903_9 PERCENT

GO TO T902_11 BRANCHPOINT
T904_9
Was it more than half of [his/her] life insurance settlement?

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

GO TO T907_9   GO TO T902_11 BRANCHPOINT

T905_9
Was it more than 75 percent of [his/her] life insurance settlement?

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

GO TO T902_11 BRANCHPOINT

T906_9
Was it more than 90 percent of [his/her] life insurance settlement?

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

GO TO T902_11 BRANCHPOINT

T907_9
Was it more than 25 percent of [his/her] life insurance settlement?

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

GO TO T902_11 BRANCHPOINT   GO TO T902_11 BRANCHPOINT

T908_9
Was it more than 10 percent of [his/her] life insurance settlement?

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

GO TO T902_11 BRANCHPOINT

***END OF BLOCK_9: LIFE INSURANCE: SAME AMOUNT TO ALL CHILDREN (T902_9 - T908_9)
*** BEGINNING OF T902_10 LOOP: LIFE INSURANCE TO EACH CHILD
T902_10 THROUGH T908_10 ARE ASKED FOR EACH CHILD.

***BEGINNING OF BLOCK_10: LIFE INSURANCE: AMOUNT TO EACH CHILD
(T902_10 - T908_10)

NOTE: THIS BLOCK IS REPEATED FOR EACH CHILD LISTED FOR A HOUSEHOLD.

T902_10
How much did CHILDn NAME and (his/her) family receive from life insurance?

[IWER: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE]
[IWER: DO NOT PROBE DK/RF]

OR

DK
RF

T902_10
T903_10
AMOUNT
PERCENT

GO TO END OF T902_10 LOOP (AFTER T908_10)

T904_10
Was it more than half of [his/her] life insurance settlement?

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

GO TO T907_10
GO TO END OF T902_10 LOOP (AFTER T908_10)

T905_10
Was it more than 75 percent of [his/her] life insurance settlement?

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

GO TO END OF T902_10 LOOP (AFTER T908_10)

T906_10
Was it more than 90 percent of [his/her] life insurance settlement?

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

GO TO END OF T902_10 LOOP (AFTER T908_10)
T907_10
Was it more than 25 percent of [his/her] life insurance settlement?

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

GO TO END OF T902_10 LOOP
(AFTER T908_10)

T908_10
Was it more than 10 percent of [his/her] life insurance settlement?

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

***END OF BLOCK_10: LIFE INSURANCE: AMOUNT TO EACH CHILD
(T902_10 - T908_10)

***END OF T902_10 LOOP: LIFE INSURANCE TO EACH CHILD
IF THERE ARE NO MORE CHILDREN, CONTINUE ON TO T902_11 BRANCHPOINT. OTHERWISE, GO BACK TO BEGINNING OF T902_10 LOOP

T902_11 BRANCHPOINT: IF LIFE INSURANCE BENEFICIARY WAS R’S SPOUSE/PARTNER
(T182=1), CONTINUE ON TO T902_11

OTHERWISE, GO TO T902_12 BRANCHPOINT
***BEGINNING OF BLOCK_11: LIFE INSURANCE: AMOUNT TO SPOUSE/PARTNER (T902_11 - T908_11)

T902_11

Altogether, how much did [you/[[his/her] [husband/wife/partner]] receive from [his/her] life insurance?

[IWER: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE]
[IWER: DO NOT PROBE DK/RF]

_________________________ OR __________________________

T902_11 AMOUNT T903_11 PERCENT

GO TO T902_12 BRANCHPOINT

T904_11

Was it more than half of [his/her] life insurance settlement?

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

GO TO T907_11  GO TO T902_12 BRANCHPOINT

T905_11

Was it more than 75 percent of [his/her] life insurance settlement?

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

GO TO T902_12 BRANCHPOINT

T906_11

Was it more than 90 percent of [his/her] life insurance settlement?

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

GO TO T902_12 BRANCHPOINT

T907_11

Was it more than 25 percent of [his/her] life insurance settlement?

1. YES 5. NO 8. DK 9. RF
**T908_11**
Was it more than 10 percent of [his/her] life insurance settlement?

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

***END OF BLOCK_11: LIFE INSURANCE: AMOUNT TO SPOUSE/PARTNER (T902_11 - T908_11)***

**T902_12 BRANCHPOINT: IF R’s LIFE INSURANCE BENEFICIARY WAS OTHER RELATIVE(S) (T182=4), CONTINUE ON TO T902_12, OTHERWISE, GO TO T902_13 BRANCHPOINT**

***BEGINNING OF BLOCK_12: LIFE INSURANCE: AMOUNT TO OTHER RELATIVES (T902_12 - T908_12)***

**T902_12**
Altogether, how much did [his/her] other relatives receive from [his/her] life insurance?

[IWER: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE]  
[IWER: DO NOT PROBE DK/RF]

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

OR

GO TO T902_13 BRANCHPOINT

**T904_12**
Was it more than half of [his/her] life insurance settlement?

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

GO TO T902_13 BRANCHPOINT

**T905_12**
Was it more than 75 percent of [his/her] life insurance settlement?

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

GO TO T902_13 BRANCHPOINT
T906_12
Was it more than 90 percent of [his/her] life insurance settlement?

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

GO TO T902_13

T907_12
Was it more than 25 percent of [his/her] life insurance settlement?

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

GO TO T902_13
BRANCHPOINT

GO TO T902_13
BRANCHPOINT

T908_12
Was it more than 10 percent of [his/her] life insurance settlement?

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

***END OF BLOCK_12: LIFE INSURANCE: AMOUNT TO OTHER RELATIVES
(T902_12 - T908_12)

T902_13 BRANCHPOINT: IF RESPONSE TO LIFE INSURANCE BENEFICIARY WAS OTHER
(SPECIFY) (T182=7)), CONTINUE ON TO T902_13

OTHERWISE, GO TO T186 BRANCHPOINT

***BEGINNING OF BLOCK_13: LIFE INSURANCE: AMOUNT TO NON-RELATIVES
(T902_13 - T908_13)

T902_13
Altogether, how much did other non-relatives receive from [his/her] life insurance?

[IWER: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE]

[IWER: DO NOT PROBE DK/RF]

_________________________ OR ___________________________  DK  RF
T902_13 AMOUNT  T903_13 PERCENT

GO TO T186 BRANCHPOINT
T904_13
Was it more than half of [his/her] life insurance settlement?

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

GO TO T907_13  GO TO T186 BRANCHPOINT

T905_13
Was it more than 75 percent of [his/her] life insurance settlement?

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

GO TO T186 BRANCHPOINT

T906_13
Was it more than 90 percent of [his/her] life insurance settlement?

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

GO TO T186 BRANCHPOINT

T907_13
Was it more than 25 percent of [his/her] life insurance settlement?

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

GO TO T186 BRANCHPOINT  GO TO T186 BRANCHPOINT

T908_13
Was it more than 10 percent of [his/her] life insurance settlement?

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

***END OF BLOCK_13: LIFE INSURANCE: AMOUNT TO NON-RELATIVES
(T902_13 - T908_13)

***END OF T902_9 LOOP: LIFE INSURANCE DISPERSAL.
CONTINUE ON TO T186.

T186 BRANCHPOINT: IF R’s SPOUSE/PARTNER WAS SOLE LIFE INSURANCE BENEFICIARY
(T182=1 ONLY) and A DOLLAR AMOUNT WAS GIVEN (T902_11 ≥ 0),
GO TO T190
T186

Altogether, what was the value of the life insurance settlement?

[IWER: DO NOT PROBE DK/RF]

AMOUNT

\[\text{DK} \quad \text{RF}\]

GO TO T190

T187-T189 Unfolding Sequence

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

PROCEDURES: 3Up1Down, 2Up2Down, 1Up3Down

BREAKPOINTS: $10,000, $25,000, $100,000, $500,000, $2,000,000

RANDOM ENTRY POINTS: $25,000, $100,000, $500,000

ENTRY POINT ASSIGNMENT: [1 ($100,000)] or [2 ($25,000)] or [{NOT 1 and NOT 2} ($500,000)] AT X512

ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

!! EXIT HEALTH CARE DECISIONS

T190

Now we wish to ask some questions about healthcare decisions toward the end of R's FIRST NAME's life.

Did R’s FIRST NAME provide written instructions about the treatment or care [he/she] wanted to receive during the final days of [his/her] life?

\[1. \text{YES} \quad 5. \text{NO} \quad 8. \text{DK} \quad 9. \text{RF}\]

GO TO T206
T191
About when were these written instructions dated (approximately)?

T191
MONTH:

01. JAN  02. FEB  03. MAR  04. APR  05. MAY  06. JUN  07. JUL
08. AUG  09. SEP  10. OCT  11. NOV  12. DEC  98. DK  99. RF

T192
YEAR

T193

T193
Did these instructions express a desire to receive all care possible under any circumstances in order to prolong life?

T194
Did these instructions express a desire to limit care in certain situations?

T195
Did these instructions express a desire to have any treatment withheld?

T196
(Did these instructions express a desire to) keep [him/her] comfortable and pain free but to forego extensive measures to prolong life?

T197
Were these instructions applicable to the actual situation?

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

GO TO T206
!! EXIT WHO CONSULTED ON HEALTH CARE DECISIONS

T198
Were you consulted about whether these instructions should be followed?

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

T199
Were any (other) family members or other persons consulted?

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

GO TO T204

T200
Who was consulted, (that is, what was their relationship to R’s FIRST NAME)?

[IWER: CHOOSE ALL THAT APPLY]

Anyone else?

1. DECEASED R  2. NON-SPOUSE/PARTNER PROXY RESPONDENT  3. SPOUSE/PARTNER  4. CHILD/CHILD-IN-LAW/GRANDCHILD

5. OTHER RELATIVE  6. FRIEND  7. PHYSICIAN/HEALTHCARE PROFESSIONAL  8. MINISTER/RABBI/PRIEST/RELIGIOUS ADVISOR

9. ATTORNEY  10. SOCIAL WORKER  97. OTHER (SPECIFY)  98. DK  99. RF

T202 BRANCHPOINT: IF PROXY DID NOT REPORT THAT A CHILD/GRANDCHILD WAS CONSULTED (T200 NOT 4), GO TO T204
T202/T060_T202

(Which child was that?)

IF GRANDCHILD:
(Which child is the parent of that grandchild?)

[IWER: CHOOSE ALL THAT APPLY]

<table>
<thead>
<tr>
<th>CHILD NAME(S)</th>
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<tr>
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<td>92. DECEASED CHILD</td>
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<tr>
<td>93. ALL CHILDREN</td>
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<tr>
<td>97. OTHER (SPECIFY) [T203]</td>
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NOTE: NAMES OF ALL LIVING AND DEAD CHILDREN ARE DISPLAYED. NAMES OF SPOUSE/PARTNERS OF CHILDREN ARE NOT DISPLAYED.

T204

Did any problems come up in trying to follow these written instructions?

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

GO TO T206

T205

Did the physician or any other health care worker have problems following the written instructions?

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

T206

Did R’s FIRST NAME (also) make any legal arrangements for a specific person or persons to make decisions about [his/her] care or medical treatment if [he/she] could not make those decisions [himself/herself]? This is sometimes called a Durable Power of Attorney for Health Care.

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

GO TO T213
T207

Who had that authority, (that is, what was their relationship to R’s FIRST NAME)?

[IWER: CHOOSE ALL THAT APPLY]

1. DECEASED R
2. NON-SPOUSE/PARTNER PROXY RESPONDENT
3. SPOUSE/ PARTNER
4. CHILD/CHILD-IN-LAW/ GRANDCHILD
5. OTHER RELATIVE
6. FRIEND
7. PHYSICIAN/HEALTHCARE PROFESSIONAL
8. MINISTER/RABBI/ PRIEST/ RELIGIOUS ADVISOR
9. ATTORNEY
10. SOCIAL WORKER
97. OTHER (SPECIFY)
98. DK
99. RF

T209 BRANCHPOINT: IF PROXY DID NOT REPORT THAT A CHILD/GRANDCHILD WAS CONSULTED (T207 NOT 4), GO TO T211

T209/T061_T209

(Which child was that?)

IF GRANDCHILD:
(Which child is the parent of that grandchild?)

[IWER: CHOOSE ALL THAT APPLY]

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<td>97. OTHER (SPECIFY) [T210]</td>
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T211
When was the Durable Power of Attorney for Health Care made (approximately)?

T211
MONTH:

01. JAN 02. FEB 03. MAR 04. APR 05. MAY 06. JUN 07. JUL
08. AUG 09. SEP 10. OCT 11. NOV 12. DEC 98. DK 99. RF

T212
YEAR

DK RF

T213
Did R’s FIRST NAME ever discuss with you or anyone else the treatment or care [he/she] wanted to receive in the final days of [his/her] life?

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

GO TO T218

T214
With whom did [he/she] discuss it, (that is, what was their relationship to R’s FIRST NAME)?

[IWER: CHOOSE ALL THAT APPLY]

2. NON-SPOUSE/PARTNER PROXY RESPONDENT
3. SPOUSE/PARTNER
4. CHILD/CHILD-IN-LAW/GRANDCHILD
5. OTHER RELATIVE
6. FRIEND
7. PHYSICIAN/HEALTHCARE PROFESSIONAL
8. MINISTER/RABBI/ PRIEST/RELIGIOUS ADVISOR
9. ATTORNEY
10. SOCIAL WORKER
97. OTHER (SPECIFY)
98. DK 99. RF

T216 BRANCHPOINT: IF PROXY DID NOT REPORT THAT A CHILD/GRANDCHILD WAS CONSULTED (T214 NOT 4), GO TO T218
T216/T062 T216

(Which child was that?)

IF GRANDCHILD:
(Which child is the parent of that grandchild?)

[IWER: CHOOSE ALL THAT APPLY]

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T218

Did any decisions have to be made about the care and treatment of R’s FIRST NAME during the final days of [his/her] life?

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

GO TO T237

T219

Who was actually involved in making decisions about the care and treatment of R’s FIRST NAME during the final days of [his/her] life, (that is, what was their relationship to R’s FIRST NAME)?

(Who else participated?)

[IWER: CHOOSE ALL THAT APPLY]

| 1. DECEASED R |
| 2. NON-SPOUSE/PARTNER PROXY RESPONDENT |
| 3. SPOUSE/ PARTNER |
| 4. CHILD/CHILD-IN-LAW/ GRANDCHILD |
| 5. OTHER RELATIVE |
| 6. FRIEND |
| 7. PHYSICIAN/HEALTHCARE PROFESSIONAL |
| 8. MINISTER/RABBI/PRIEST/ RELIGIOUS ADVISOR |
| 9. ATTORNEY |
| 10. SOCIAL WORKER |
| 97. OTHER (SPECIFY) |
| 98. DK |
| 99. RF |

T220
T221 BRANCHPOINT: IF PROXY DID NOT REPORT THAT A CHILD/GRANDCHILD WAS CONSULTED (T219 NOT 4), GO TO T223 BRANCHPOINT

(Which child was that?)

IF GRANDCHILD:
(Which child is the parent of that grandchild?)

[IWER: CHOOSE ALL THAT APPLY]

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T223 BRANCHPOINT: IF DECEASED R WAS AMONG THOSE CONSULTED (T219=1), GO TO T227 BRANCHPOINT

Was R’s FIRST NAME able to participate in decisions about [his/her] medical care during the final days of [his/her] life?

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

GO TO T227 BRANCHPOINT GO TO T227 BRANCHPOINT

T224

For about how long before R’s FIRST NAME died was [he/she] unable to participate in decisions about [his/her] medical care?

_________________ OR _______________ OR _______________ DK RF
T227 BRANCHPOINT: IF AT LEAST TWO {PEOPLE OR CATEGORY OF PERSON} PARTICIPATED IN THE DECISIONS {{BETWEEN QUESTIONS T219 AND T221} AND T223=1} see NOTE, below), CONTINUE ON TO T227

OTHERWISE, GO TO T230

NOTE: “AT LEAST TWO {PEOPLE OR CATEGORY OF PERSONS)” CAN BE
(a) NUMBER OF SELECTIONS AT (T219 or T221) > 1, or
(b) SELECTION OF (“1. DECEASED R( AT T219 or T223=1) IN ADDITION TO ONE
OTHER SELECTION AT T219, or
(c) MORE THAN ONE CHILD SELECTED AT T221, WHICH CAN INCLUDE (92.
DECEASED CHILD(, or
(d) SELECTION OF (93. ALL CHILDREN( AT T221.

T227
Who was the main decision-maker (that is, what was their relationship to R’s FIRST NAME)?

1. DECEASED R
2. NON-SPOUSE/PARTNER
   PROXY RESPONDENT
3. SPOUSE/ PARTNER
4. CHILD/CHILD-IN-LAW/
   GRANDCHILD
5. OTHER
   RELATIVE
6. FRIEND
7. PHYSICIAN/HEALTHCARE
   PROFESSIONAL
8. MINISTER/RABBI/PRIEST/
   RELIGIOUS ADVISOR
9. ATTORNEY
10. SOCIAL WORKER
97. OTHER (SPECIFY)
98. DK
99. RF

T244

NOTE: RESPONSE “1. DECEASED R” APPEARS ONLY IF PROXY SAID R WAS ABLE TO PARTICIPATE IN HIS/HER OWN DECISIONS (T223=1).

T228 BRANCHPOINT: IF PROXY DID NOT REPORT THAT A CHILD/GRANDCHILD WAS CONSULTED (T227 NOT 4), GO TO T230

IF (PROXY GAVE ONLY 1 RESPONSE TO T221 and THAT RESPONSE WAS NOT "ALL CHILDREN" (T221 NOT 93)), GO TO T230
T228/T243_T228
(Which child was that?)

IF GRANDCHILD:
(Which child is the parent of that grandchild?)

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!! EXIT TYPE OF HEALTH CARE DECISIONS

T230
Did those last decisions involve a desire to give all care possible unconditionally in order to prolong life?

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

T231
Did those last decisions involve limiting care in certain situations?

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

T232
Did those last decisions involve withholding any treatment?

1. YES  5. NO  8. DK  9. RF
T233
Did those last decisions rest largely on keeping R’s FIRST NAME comfortable and pain free without taking extensive measures to prolong life?

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

T234
Did any doctor(s) recommend any care or treatment that the family or other decision-maker(s) ultimately refused?

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

GO TO T236

T235
Did R’s FIRST NAME receive this treatment anyway?

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

T236
Did cost enter into the decisions about what care or treatment [he/she] would receive in the final days of [his/her] life?

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

T237
Thinking back over the course of R’s FIRST NAME’s life, what would you say were [his/her] greatest strengths?

DK    RF

IF THIS IS A CORE INTERVIEW, GO TO SECTION U

IF THIS IS AN EXIT INTERVIEW, GO TO MODULES