

T000_SectionIntro

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)

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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 Z093)

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)

R 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.

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WILLS--FAMILY

T001 BRANCHPOINT: IF THIS IS AN EXIT INTERVIEW, GO TO T101 BRANCHPOINT

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, GO TO T011
 - DK, GO TO T011
 - 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, GO TO T008
 - DK, GO TO T008
 - RF, GO TO T008
-

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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, GO TO T006 BRANCHPOINT
DK, GO TO T006 BRANCHPOINT
RF, GO TO T006 BRANCHPOINT

T050_T004MTemp

(Which child is that?)

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

CHILD NAME(S)
[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]
3. THROUGH 52. CHILD NAME(S)
[ROWS PROVIDED BY BLAISE AS NECESSARY]
93. ALL CHILDREN EQUALLY
96. ALL CHILDREN - "EQUALLY" NOT MENTIONED
98.DK
99.RF

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

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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
DK
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, GO TO T008
DK, GO TO T008
RF, GO TO T008

T051_T007MTemp

(Which of your children 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
DK
RF
NOTE: NAMES OF ALL LIVING AND DEAD CHILDREN ARE DISPLAYED. NAMES OF SPOUSE/PARTNERS
OF CHILDREN ARE NOT DISPLAYED.

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, GO TO T036
 - 8. DK, GO TO T036
 - 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
 - DK
 - 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]

_____, GO TO T017

AMOUNT

DK

RF

T014-T016

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

T052_T017MTemp

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]

CHILD NAME(S)
[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]
3. THROUGH 52. CHILD NAME(S)
91. R'S SPOUSE/PARTNER
[ROWS PROVIDED BY BLAISE AS NECESSARY]
92. DECEASED CHILD
93. ALL CHILDREN
DK
RF

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

T045S

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]

97. OTHER (SPECIFY)

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, GO TO T031
 - DK, GO TO T031
 - 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
 - DK
 - RF

T020_

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

[IWER: DO NOT PROBE DK/RF]

_____, GO TO T024
AMOUNT

DK,
RF

T021-T023

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

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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, GO TO T025

0 NO PREMIUM PAYMENTS, GO TO T029 BRANCHPOINT

DK

RF

T026-T028

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

HRS 2014 - Section T

T025_

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]

PER:
1. MONTH
2. YEAR
DK
RF

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

T053_T029MTemp

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]

CHILD NAME(S)
[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]
3. THROUGH 52. CHILD NAME(S)
91. R'S SPOUSE/PARTNER
92. DECEASED CHILD
93. ALL CHILDREN
94. ALL GRANDCHILDREN
97. OTHER (SPECIFY) [T030]
DK
RF

T030S

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]

97. OTHER (SPECIFY)

NEW LIFE INSURANCE

T031_

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

1. YES
5. NO, GO TO T036
DK, GO TO T036
RF, GO TO T036

T032_

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

[IWER: DO NOT PROBE DK/RF]

_____, GO TO T036

AMOUNT

DK

RF

T033-T035

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

LAPSED LIFE INSURANCE

T036_

[Since R's LAST IW 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, GO TO T245 BRANCHPOINT
DK, GO TO T245 BRANCHPOINT
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]

_____, GO TO T041
AMOUNT

DK
RF

T038-T040

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, GO TO T245 BRANCHPOINT,
DK
RF

HRS 2014 - Section T

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)
 - DK
 - RF
-

T048S

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

OTHER (SPECIFY)

T043_

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

- 1. YES
 - 5. NO, GO TO T245
 - DK, GO TO T245
 - RF, GO TO T245
-

T044_

About how much cash did you receive?

<div>AMOUNT</div> <div>DK</div> <div>RF</div>

T252 BRANCHPOINT: IF R IS LESS THAN 65 YEARS (A019<65), GO TO T047 (T ASSIST)

T252

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.

[IWER: PRESS 1 TO CONTINUE]

<div>1. CONTINUE</div> <div>NOTE: '1. CONTINUE' IS ONLY ACCEPTABLE RESPONSE.</div>
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HRS 2014 - Section T

T245 BRANCHPOINT: IF R REPORTED IN PRIOR WAVE THAT THEY HAD DISCUSSED FUTURE MEDICAL CARE WITH SOMEONE ELSE (Z274=1), GO TO T246

T245

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
DK
RF

T246

IF PROXY IW OR R DID NOT REPORT HAVING DPOA IN PRIOR WAVE (Z275_CareArrangements = 2 or 5):
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".

OTHERWISE:

Last time we spoke with you, in [PREV WAVE MONTH,YEAR] you told us that you have a legal arrangement for a specific person or persons to make decisions about your care or medical treatment if you cannot make those decisions yourself. This is sometimes called a 'Durable Power of Attorney for Health Care'.

Do you still have this arrangement in place?

1. Yes
5. No
DK, GO TO T250
RF, GO TO T250

NOTE: THE RESPONSES BELOW ARE ONLY SHOWN FOR "OTHERWISE"

1. Yes
2. Yes, but arrangement has changed [VOL]
3. Disputes previous wave record, but now has arrangement [VOL]
4. Disputes previous wave record, does not have arrangement [VOL, GO TO T250]
5. No, GO TO T250
DK, GO TO T250
RF, GO TO T250
-

T247M

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
- 8. MINISTER/RABBI/PRIEST/ RELIGIOUS ADVISOR
- 9. ATTORNEY
- 10. SOCIAL WORKER
- 97. OTHER (SPECIFY), GO TO T249
- DK
- RF

HRS 2014 - Section T

T248 BRANCHPOINT: GO TO T250

T248/T066_T248

(Which child was that?)

IF GRANDCHILD:

(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)

98. DK

99. RF

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

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)?

OTHER RELATIONSHIP

DK

RF

T250

IF PROXY IW OR R DID NOT REPORT HAVING A LIVING WILL AT PRIOR WAVE (Z275_CareArrangements=1 or 5):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".

OTHERWISE:

Last time we spoke with you, in [PREV WAVE MONTH,YEAR] you told us that you have written instructions about the care or medical treatment that you want to receive if you cannot make those decisions yourself. This is sometimes called a "Living Will".

Do you still have this arrangement in place?

1. Yes
5. No, GO TO T047 (T ASSIST)
DK, GO TO T047 (T ASSIST)
RF, GO TO T047 (T ASSIST)

NOTE: THE RESPONSES BELOW ARE ONLY SHOWN FOR "OTHERWISE"

1. Yes
2. [VOL] Yes, but arrangement has changed
3. [VOL] Disputes previous wave record, but now has arrangement
4. [VOL] Disputes previous wave record, does not have arrangement, GO TO T047 (T ASSIST)
5. No, GO TO T047 (T ASSIST)
DK, GO TO T047 (T ASSIST)
RF, 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?

1. YES
5. NO
DK
RF
-

T047_AssistT

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

HRS 2014 - Section T

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 (Z145={2 or 3 or 4}) and WE DON'T NEED TO ASK ABOUT THE HOME DISPOSITION (Z146 {NOT 1 and NOT 3}), GO TO T155 BRANCHPOINT

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 T124 BRANCHPOINT

T101_OwnedMainRes

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 (X066Preload_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 X092X038),]YEAR (per X093X038)/the last two years].

IF R WAS MARRIED/PARTNERED HH's LAST IW (X066Preload_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, GO TO T111
- 2. [VOL] RECORDS INCORRECT
- 5. NO
- DK, GO TO T124 BRANCHPOINT
- RF, GO TO T124 BRANCHPOINT

EXIT NO 1st HOME AT DEATH

T066_EvrOwnedMainRes

Did R's FIRST NAME ever own it?

- 1. YES
 - 5. NO, GO TO T124 BRANCHPOINT
 - DK, GO TO T124 BRANCHPOINT
 - RF, GO TO T124 BRANCHPOINT
-

T102_DispoMainRes

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

- 1. GAVE TO SOMEONE
 - 2. SOLD, GO TO T107
 - 7. OTHER (SPECIFY) , GO TO T124 BRANCHPOINT
 - DK, GO TO T124 BRANCHPOINT
 - RF, GO TO T124 BRANCHPOINT
-

T103_

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

- _____, GO TO T124 BRANCHPOINT
 - OTHER (SPECIFY)
-

T104_GaveMainRes

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
- DK
- 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

T054_T105MTemp

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]

- 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) (T106)
- DK
- RF
- NOTE: NAMES OF ALL LIVING AND DEAD CHILDREN ARE DISPLAYED. NAMES OF SPOUSE/PARTNERS OF CHILDREN ARE NOT DISPLAYED.

T106_

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]

OTHER (SPECIFY)

T107_MainResValue

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]

_____, GO TO T124 BRANCHPOINT
AMOUNT

DK
RF

T108-T110

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 BRANCHPOINT: GO TO T124 BRANCHPOINT

T111_DispMainRes2

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, GO TO T124 BRANCHPOINT
2. SOLD, GO TO T116
3. INHERITED
4. NOT YET DISPOSED, GO TO T120
7. OTHER (SPECIFY)T112, GO TO 124 BRANCHPOINT
DK, GO TO 124 BRANCHPOINT
RF, GO TO 124 BRANCHPOINT

T112_

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?

_____, GO TO 124 BRANCHPOINT
OTHER (SPECIFY)

EXIT 1st HOME INHERITED

T113_GaveMainRes2

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
- DK
- RF

HRS 2014 - Section T

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

T055_T114MTemp

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]

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) (T115)

DK

RF

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

T115_

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]

OTHER (SPECIFY)

EXIT 1st HOME SOLD

T116_MainResValue2

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]

_____, GO TO T124 BRANCHPOINT
AMOUNT

DK
RF

T117-T119

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

HRS 2014 - Section T

EXIT HOME NOT DISPOSED

T120 BRANCHPOINT: GO TO T124 BRANCHPOINT

T120_

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

- 1. VACANT, GO TO T124 BRANCHPOINT
 - 5. OCCUPIED
 - DK, GO TO T124 BRANCHPOINT
 - RF, GO TO 124 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
 - DK
 - RF
-

HRS 2014 - Section T

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

T056_T122MTemp

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]

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) [T123]
DK
RF
NOTE: NAMES OF ALL LIVING AND DEAD CHILDREN ARE DISPLAYED. NAMES OF SPOUSE/PARTNERS
OF CHILDREN ARE NOT DISPLAYED.

T123_

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]

OTHER (SPECIFY)

HRS 2014 - Section T

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 NOT 1), GO TO T148

T124_Owned2ndRes

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 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, 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 [MONTH,]YEAR/in the last two years before [his/her] death].

ASK ALL PROXIES:

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

- 1. YES, GO TO T135
- 2. [VOL] RECORDS INCORRECT
- 5. NO
- DK, GO TO T148
- RF, GO TO T148

EXIT 2ND HOME DISPOSED BEFORE DEATH

T125_EvrOwned2ndRes

Did R's FIRST NAME ever own it?

- 1. YES
 - 5. NO, GO TO T148
 - DK, GO TO T148
 - RF, GO TO T148
-

T240_Dispo2ndRes

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

- 1. GAVE TO SOMEONE
 - 2. SOLD, GO TO T131
 - 7. OTHER (SPECIFY)
 - DK, GO TO T148
 - RF, GO TO T148
-

T241_

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

_____, GO TO T148
OTHER (SPECIFY)

EXIT 2ND HOME INHERITED BEFORE DEATH

T128_Gave2ndRes

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
- DK
- RF

HRS 2014 - Section T

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

T057_T129MTemp

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]

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) [T130]

DK

RF

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

T130_

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]

OTHER (SPECIFY)

EXIT 2ND HOME SOLD BEFORE DEATH

T131_2ndResValue

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]

_____, GO TO T148
AMOUNT

DK
RF

T132-T134

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

HRS 2014 - Section T

EXIT 2ND HOME DISPOSAL AFTER DEATH

T135 BRANCHPOINT: GO TO T148

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,GO TO T148
 - 2. SOLD, GO TO 140
 - 3. INHERITED
 - 4. NOT YET DISPOSED, GO TO T144
 - 7. OTHER (SPECIFY) , GO TO T148
 - DK, GO TO T148
 - RF, GO TO T148
-

T136_

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?

_____, GO TO T148
OTHER (SPECIFY)

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
- DK
- RF

HRS 2014 - Section T

T138 BRANCHPOINT: IF PROXY DID NOT REPORT THAT CHILD/GRANDCHILD INHERITED HOUSE (T137 {NOT 2 and NOT 6}), GO TO T140

T058_T138MTemp

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]

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) [T139]
DK
RF

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

T139_

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]

OTHER (SPECIFY)

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]

_____, GO TO T148
AMOUNT

DK
RF

T141-T143

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

HRS 2014 - Section T

EXIT 2ND HOME NOT DISPOSED YET

T144 BRANCHPOINT: GO TO T148

T144_2ndResOccupied

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

- 1. VACANT, GO TO T148
 - 5. OCCUPIED
 - DK, GO TO T148
 - RF, 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
 - DK
 - RF
-

HRS 2014 - Section T

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

T059_T146MTemp

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

T147_

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]

OTHER (SPECIFY)

EXIT DEATH EXPENSES

T148_DeathExpenses

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]

_____, GO TO T152

AMOUNT

99996 NOT SETTLED YET, GO TO T152

0, GO TO T155 BRANCHPOINT

DK

RF

T149-T151

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?

1. YES
5. NO, GO TO T155 BRANCHPOINT
DK, GO TO T155 BRANCHPOINT
RF, GO TO T155 BRANCHPOINT

T153_

How much did insurance pay?

____ OR ____
AMOUNT PERCENT
T153 T154

DK
RF

T154_

How much did insurance pay?

PERCENT

EXIT INHERITANCE

T155 BRANCHPOINT: IF THIS IS A POST-EXIT IW and WE DON'T NEED TO ASK ABOUT THE WILL/TRUST (Z146 {NOT 2 and NOT 3}), GO TO T173

T155_

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
DK
RF

T156_HaveWill

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 FIR0053T NAME have a will that was written and witnessed?

1. YES
5. NO, GO TO T161 BRANCHPOINT
DK, GO TO T161 BRANCHPOINT
RF, GO TO T161 BRANCHPOINT

T157_WillProbated

Has [his/her] will been probated?

1. YES
 2. [VOL] NO: PROBATE NOT NEEDED, GO TO T161 BRANCHPOINT
 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, GO TO T161 BRANCHPOINT
 5. NO, GO TO T161 BRANCHPOINT
 7. [VOL] R DISPUTES RECORD, GO TO T161 BRANCHPOINT
 - DK, GO TO T161 BRANCHPOINT
 - RF, GO TO T161 BRANCHPOINT
-

puT158_StateProbate | StateList.LOOKUP.StateName

In what state was it probated?

_____, GO TO T161 BRANCHPOINT
STATE

97. OTHER COUNTRY (SPECIFY)
DK, GO TO T161 BRANCHPOINT
RF, GO TO T161 BRANCHPOINT

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

T159_

In what state was it probated?

OTHER COUNTRY (SPECIFY)

T160_CntyProbate

In what county was it probated?

COUNTY

DK
RF

HRS 2014 - Section T

EXIT DISTRIBUTION OF ASSETS

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

T161_

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)
- DK
- RF

T162_

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?

OTHER (SPECIFY)

HRS 2014 - Section T

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_WillSpouseP

T163 THROUGH T908-8 ARE ASKED FOR POTENTIAL BENEFICIARIES OF R's ESTATE.

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]

IF R WAS NOT PART OF A COUPLE (X065 {NOT 1 and NOT 3}),
GO TO T164 BRANCHPOINT

1. YES
5. NO, GO TO T164 BRANCHPOINT
DK, GO TO T164 BRANCHPOINT
RF, GO TO T164 BRANCHPOINT

HRS 2014 - Section T

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

T902_WillInsAmt

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]

_____, GO TO T164 BRANCHPOINT
AMOUNT

DK, GO TO T904_1

RF, GO TO T904_1

T903_WillInsPercent

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]

_____, GO TO T164 BRANCHPOINT
PERCENT

DK

RF

T904_Half

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

1. YES
5. NO, GO TO T907_1
DK, GO TO T164 BRANCHPOINT
RF, GO TO T164 BRANCHPOINT

T905_More75

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

1. YES
5. NO, GO TO T164 BRANCHPOINT
DK, GO TO T164 BRANCHPOINT
RF, GO TO T164 BRANCHPOINT

T906_More90

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

1. YES, GO TO T164 BRANCHPOINT
5. NO, GO TO T164 BRANCHPOINT
DK, GO TO T164 BRANCHPOINT
RF, GO TO T164 BRANCHPOINT

T907_More25

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

1. YES, GO TO T164 BRANCHPOINT
5. NO
DK, GO TO T164 BRANCHPOINT
RF, GO TO T164 BRANCHPOINT

T908_More10

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

1. YES
5. NO
DK
RF

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

HRS 2014 - Section T

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_WillChildren

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, GO TO T168
- DK, GO TO T168
- 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_WillSameAmtChld

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, GO TO T902_2
- 5. NO, GO TO BEGINNING OF T902_3 LOOP
- DK, GO TO BEGINNING OF T902_3 LOOP
- RF, GO TO BEGINNING OF T902_3 LOOP

HRS 2014 - Section T

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

T166_WillSameAmtGChld

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

1. YES
5. NO
DK
RF

HRS 2014 - Section T

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

T902_WillInsAmt

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]

_____, GO TO T168
AMOUNT

DK, GO TO T1904_2
RF, GO TO T904_2

T902_2 AMOUNT , GO TO T168
OR

T903_1 PERCENT, GO TO T168
DK
RF

T903_WillInsPercent

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]

_____, GO TO T168
PERCENT

DK
RF

T904_Half

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

1. YES
5. NO, GO TOT907_2
DK, GO TO T168
RF, GO TO T168

T905_More75

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

1. YES
5. NO, GO TO T168
DK, GO TO T168
RF, GO TO T168

T906_More90

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

1. YES, GO TO GO TO T168
5. NO, GO TO GO TO T168
DK, GO TO GO TO T168
RF, GO TO GO TO T168

T907_More25

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

1. YES, GO TO GO TO T168
5. NO
DK, GO TO GO TO T168
RF, GO TO GO TO T168

T908_More10

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

1. YES, GO TO GO TO T168
5. NO, GO TO GO TO T168
DK, GO TO GO TO T168
RF, GO TO GO TO T168

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

*****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)**

T902_3 LOOP BRANCHPOINT: GO TO T168

T902_WillInsAmt

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

(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]

_____, GO TO END OF T902_3 LOOP (AFTER T908_3)
AMOUNT

DK, GO TO T904_3
RF, GO TO T904_3

T903_WillInsPercent

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]

_____, GO TO END OF T902_3 LOOP (AFTER T908_3)
PERCENT

DK
RF

T904_Half

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

1. YES
5. NO, GO TO T907_3
DK, GO TO END OF T902_3 LOOP (AFTER T908_3)
RF, GO TO END OF T902_3 LOOP (AFTER T908_3)

T905_More75

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

1. YES
5. NO, GO TO END OF T902_3 LOOP (AFTER T908_3)
DK, GO TO END OF T902_3 LOOP (AFTER T908_3)
RF, GO TO END OF T902_3 LOOP (AFTER T908_3)

T906_More90

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

1. YES, GO TO END OF T902_3 LOOP (AFTER T902_3)
5. NO, GO TO END OF T902_3 LOOP (AFTER T902_3)
DK, GO TO END OF T902_3 LOOP (AFTER T902_3)
RF, GO TO END OF T902_3 LOOP (AFTER T902_3)

T907_More25

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

1. YES, GO TO END OF T902_3 LOOP (AFTER T908_3)
5. NO
DK, GO TO END OF T902_3 LOOP (AFTER T908_3)
RF, GO TO END OF T902_3 LOOP (AFTER T908_3)

T908_More10

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

1. YES
5. NO
DK
RF

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

T908_More10

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

1. YES
5. NO
DK
RF

*****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_WillCharity

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, GO TO T169
DK, GO TO T169
RF, GO TO T169

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

T902_WillInsAmt

How much did charities receive from [his/her] estate?

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

[IWER: DO NOT PROBE DK/RF]

_____, GO TO T169
AMOUNT
DK, GO TO T904_4
RF, GO TO T904_4

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

T902_WillInsAmt

How much did charities receive from [his/her] estate?

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

[IWER: DO NOT PROBE DK/RF]

_____, GO TO T169 AMOUNT DK, GO TO T904_4 RF, GO TO T904_4

T903_WillInsPercent

How much did charities receive from [his/her] estate?

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

[IWER: DO NOT PROBE DK/RF]

_____, GO TO T169 PERCENT DK RF
--

T904_Half

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

1. YES
5. NO, GO TO T907_4
DK, GO TO T169
RF, GO TO T169

T905_More75

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

1. YES
5. NO, GO TO T169
DK, GO TO T169
RF, GO TO T169

T906_More90

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

1. YES, GO TO T169
5. NO, GO TO T169
DK, GO TO T169
RF, GO TO T169

T907_More25

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

1. YES, GO TO T169
5. NO
DK, GO TO T169
RF, GO TO T169

T908_More10

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

1. YES
5. NO
DK
RF

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

T908_More10

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

1. YES
5. NO
DK
RF

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

T169_WillSibs

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, GO TO T170
DK, GO TO T170
RF, GO TO T170

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

T902_WillInsAmt

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]

_____, GO TO T170
AMOUNT

DK, GO TO T904_5

RF, GO TO T904_5

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

T902_WillInsAmt

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]

_____, GO TO T170
AMOUNT

DK, GO TO T904_5

RF, GO TO T904_5

T903_WillInsPercent

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]

_____, GO TO T170
PERCENT

DK
RF

T904_Half

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

1. YES
5. NO, GO TO T907_5
DK, GO TO T170
RF, GO TO T170

T905_More75

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

1. YES
5. NO, GO TO T170
DK, GO TO T170
RF, GO TO T170

T906_More90

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

1. YES, GO TO T170
5. NO, GO TO T170
DK, GO TO T170
RF, GO TO T170

T907_More25

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

1. YES, GO TO T170
5. NO
DK, GO TO T170
RF, GO TO T170

T908_More10

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

1. YES
5. NO
DK
RF

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

T908_More10

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

1. YES
5. NO
DK
RF

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

T170_WillRelative

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, GO TO T171
DK, GO TO T171
RF, GO TO T171

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

T902_WillInsAmt

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]

_____, GO TO T171
AMOUNT
DK, GO TO T904_6
RF, GO TO T904_6

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

T902_WillInsAmt

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]

_____, GO TO T171

AMOUNT

DK, GO TO T904_6

RF, GO TO T904_6

T903_WillInsPercent

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]

_____, GO TO T171

PERCENT

DK

RF

T904_Half

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

1. YES
5. NO, GO TO T907_6
DK, GO TO T171
RF, GO TO T171

T905_More75

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

1. YES
5. NO, GO TO T171
DK, GO TO T171
RF, GO TO T171

T906_More90

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

1. YES, GO TO T171
5. NO, GO TO T171
DK, GO TO T171
RF, GO TO T171

T907_More25

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

1. YES, GO TO T171
5. NO
DK, GO TO T171
RF, GO TO T171

T908_More10

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

1. YES
5. NO
DK
RF

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

T908_More10

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

1. YES
5. NO
DK
RF

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

T171_WillFriends

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, GO TO T172
DK, GO TO T172
RF, GO TO T172

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

T902_WillInsAmt

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]

_____, GO TO T172

AMOUNT

DK, GO TO T904_7

RF, GO TO T904_7

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

T902_WillInsAmt

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]

_____, GO TO T172

AMOUNT

DK, GO TO T904_7

RF, GO TO T904_7

T903_WillInsPercent

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]

_____, GO TO T172
PERCENT

DK
RF

T904_Half

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

1. YES
5. NO, GO TO T907_7
DK, GO TO T172
RF, GO TO T172

T905_More75

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

1. YES
5. NO, GO TO T172
DK, GO TO T172
RF, GO TO T172

T906_More90

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

1. YES, GO TO T172
5. NO, GO TO T172
DK, GO TO T172
RF, GO TO T172

T907_More25

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

1. YES, GO TO T172
5. NO
DK, GO TO T172
RF, GO TO T172

T908_More10

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

1. YES
5. NO
DK
RF

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

T908_More10

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

1. YES
5. NO
DK
RF

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

T172_WillOthers

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, GO TO T173
DK, GO TO T173
RF, GO TO T173

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

T902_WillInsAmt

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]

_____, GO TO T173
AMOUNT
DK, GO TO T904_8
RF, GO TO T904_8

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

T902_WillInsAmt

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]

_____, GO TO T173

AMOUNT

DK, GO TO T904_8

RF, GO TO T904_8

T903_WillInsPercent

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]

_____, GO TO 173

PERCENT

DK

RF

T904_Half

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

1. YES
5. NO, GO TO T907_8
DK, GO TO T173
RF, GO TO T173

T905_More75

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

1. YES
5. NO, GO TO T173
DK, GO TO T173
RF, GO TO T173

T906_More90

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

1. YES, GO TO T173
5. NO, GO TO T173
DK, GO TO T173
RF, GO TO T173

T907_More25

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

1. YES, GO TO T173
5. NO
DK, GO TO T173
RF, GO TO T173

T908_More10

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

1. YES
5. NO
DK
RF

***END OF T163 ESTATE DISPERSAL LOOP. CONTINUE ON TO T173.

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

*****END OF T163 ESTATE DISPERSAL LOOP. CONTINUE ON TO T173.**

T908_More10

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

1. YES
5. NO
DK
RF

***END OF T163 ESTATE DISPERSAL LOOP. CONTINUE ON TO T173.

*****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_ValueEstate

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

[IWER: DO NOT PROBE DK/RF]

_____, GO TO T242 BRANCHPOINT
AMOUNT

DK
RF

T174-T176

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
[1 (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_IncValue

Does that include the value of the home?

1. YES
5. NO
DK
RF

EXIT ESTATE IN TRUST

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

T177_EstateInTrust

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, GO TO T181 BRANCHPOINT
- DK, GO TO T181 BRANCHPOINT
- 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
DK
RF

T179_

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.

OTHER (SPECIFY)

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

T065_T180MTemp

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]

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

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

92. DECEASED CHILD

97. OTHER (SPECIFY) [T238]

DK

RF

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

T238_

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]

OTHER (SPECIFY)

EXIT LIFE INSURANCE SETTLEMENT

T181_HaveLifeIns

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, GO TO T190
DK, GO TO T190
RF, GO TO T190

T182

Who were the beneficiaries of that life insurance?

[IWER: CHOOSE ALL THAT APPLY]

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

T183_

Who were the beneficiaries of that life insurance?

[IWER: CHOOSE ALL THAT APPLY]

OTHER (SPECIFY)

HRS 2014 - Section T

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

T184

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

- 1. YES
 - 5. NO, GO TO THE BEGINNING OF T902_10 LOOP
 - DK, GO TO THE BEGINNING OF T902_10 LOOP
 - RF, GO TO THE BEGINNING OF T902_10 LOOP
-

HRS 2014 - Section T

*****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)**

T902_WillInsAmt

T902_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]

_____, GO TO T902_11 BRANCHPOINT
AMOUNT

OR

_____, GO TO T902_11 BRANCHPOINT
PERCENT

DK
RF

HRS 2014 - Section T

*****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)**

T902_WillInsAmt

T902_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]

_____, GO TO T902_11 BRANCHPOINT
AMOUNT

OR

_____, GO TO T902_11 BRANCHPOINT
PERCENT

DK
RF

T904_Half

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

1. YES
5. NO, GO TO T907_9
DK, GO TO T902_11 BRANCHPOINT
RF, GO TO T902_11 BRANCHPOINT

T905

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

1. YES
5. NO, GO TO T902_11 BRANCHPOINT
DK, GO TO T902_11 BRANCHPOINT
RF, GO TO T902_11 BRANCHPOINT

T906_More90

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

1. YES, GO TO T902_11 BRANCHPOINT
5. NO, GO TO T902_11 BRANCHPOINT
DK, GO TO T902_11 BRANCHPOINT
RF, GO TO T902_11 BRANCHPOINT

T907_9

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

1. YES, GO TO T902_11 BRANCHPOINT
5. NO,
DK, GO TO T902_11 BRANCHPOINT
RF, GO TO T902_11 BRANCHPOINT

T908_More10

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

1. YES, GO TO T902_11 BRANCHPOINT
5. NO, GO TO T902_11 BRANCHPOINT
DK, GO TO T902_11 BRANCHPOINT
RF, GO TO T902_11 BRANCHPOINT

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

HRS 2014 - Section T

***** 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_WillInsAmt

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]

_____, GO TO END OF T902_10 LOOP (AFTER T908_10)
AMOUNT
T902_10

OR

_____, GO TO END OF T902_10 LOOP (AFTER T908_10)
PERCENT
T903_10

DK
RF

HRS 2014 - Section T

***** 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.**

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

T902_WillInsAmt

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]

_____, GO TO END OF T902_10 LOOP (AFTER T908_10)
AMOUNT
T902_10

OR

_____, GO TO END OF T902_10 LOOP (AFTER T908_10)
PERCENT
T903_10

DK
RF

T904_Half

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

1. YES
5. NO, GO TO T907_10
DK, GO TO END OF T902_10 LOOP (AFTER T908_10)
RF, 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, GO TO END OF T902_10 LOOP (AFTER T908_10)
DK, GO TO END OF T902_10 LOOP (AFTER T908_10)
RF, GO TO END OF T902_10 LOOP (AFTER T908_10)

T906_More90

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

1. YES, GO TO END OF T902_10 LOOP AFTER (T908_10)
5. NO, GO TO END OF T902_10 LOOP (AFTER T908_10)
DK, GO TO END OF T902_10 LOOP (AFTER T908_10)
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, GO TO END OF T902_10 LOOP AFTER (T908_10)
5. NO
DK, GO TO END OF T902_10 LOOP (AFTER T908_10)
RF, GO TO END OF T902_10 LOOP (AFTER T908_10)

T908_More10

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

1. YES
5. NO
DK
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**

T908_More10

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

1. YES
5. NO
DK
RF

*****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**

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

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

T902_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]

_____, GO TO END OF T902_12 LOOP
AMOUNT

DK, GO TO T904_11
RF, GO TO T904_11

T903_WillInsPercent

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]

_____, GO TO END OF T902_12 LOOP
PERCENT

DK
RF

T904_11

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

1. YES
5. NO, GO TO T907_11
DK, GO TO T902_12 BRANCHPOINT
RF, GO TO T902_12 BRANCHPOINT

T905_11

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

1. YES
5. NO, GO TO T902_12 BRANCHPOINT
DK, GO TO T902_12 BRANCHPOINT
RF, GO TO T902_12 BRANCHPOINT
-

T906_11

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

1. YES, GO TO T902_12 BRANCHPOINT
5. NO, GO TO T902_12 BRANCHPOINT
DK, GO TO T902_12 BRANCHPOINT
RF, GO TO T902_12 BRANCHPOINT
-

T907_More25

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

1. YES, GO TO T902_12 BRANCHPOINT
5. NO
DK, GO TO T902_12 BRANCHPOINT
RF, GO TO T902_12 BRANCHPOINT
-

T908_11

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

1. YES
5. NO
DK
RF

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

HRS 2014 - Section T

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

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

T902_WillInsAmt

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]

_____, GO TO T902_13 BRANCHPOINT

AMOUNT
T902_12

OR

_____, GO TO T902_13 BRANCHPOINT

PERCENT
T903_12

DK
RF

HRS 2014 - Section T

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

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

T902_WillInsAmt

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]

_____, GO TO T902_13 BRANCHPOINT

AMOUNT

T902_12

OR

_____, GO TO T902_13 BRANCHPOINT

PERCENT

T903_12

DK

RF

T904_Half

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

1. YES

5. NO, GO TO T907_12

DK, GO TO T902_13 BRANCHPOINT

RF, GO TO T902_13 BRANCHPOINT

T905_12

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

1. YES
5. NO, GO TO T902_13 BRANCHPOINT
DK, GO TO T902_13 BRANCHPOINT
RF, GO TO T902_13 BRANCHPOINT

T906_12

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

1. YES.GO TO T902_13 BRANCHPOINT
5. NO, GO TO T902_13 BRANCHPOINT
DK, GO TO T902_13 BRANCHPOINT
RF, GO TO T902_13 BRANCHPOINT

T907_12

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

1. YES, GO TO T902_13 BRANCHPOINT
5. NO
DK, GO TO T902_13 BRANCHPOINT
RF, GO TO T902_13 BRANCHPOINT

T908_More10

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

1. YES
5. NO
DK,
RF

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

T908_More10

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

1. YES
5. NO
DK,
RF

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

HRS 2014 - Section T

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

OTHERWISE, GO TO T186 BRANCHPOINT

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]

_____, GO TO T186 BRANCHPOINT
AMOUNT

DK, GO TO T904_13
RF, GO TO T904_13

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

T903_WillInsPercent

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]

_____, GO TO T186 BRANCHPOINT
PERCENT

DK
RF

T904_13

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

1. YES
5. NO, GO TO T907_13
DK, GO TO T186 BRANCHPOINT
RF, GO TO T186 BRANCHPOINT

T905_More75

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

1. YES
5. NO, GO TO T186 BRANCHPOINT
DK, GO TO T186 BRANCHPOINT
RF, GO TO T186 BRANCHPOINT

T906_13

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

1. YES, GO TO T186 BRANCHPOINT
5. NO, GO TO T186 BRANCHPOINT
DK, GO TO T186 BRANCHPOINT
RF, GO TO T186 BRANCHPOINT

T907_13

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

1. YES, GO TO T186 BRANCHPOINT
5. NO
DK, GO TO T186 BRANCHPOINT
RF, GO TO T186 BRANCHPOINT

T908_13

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

1. YES
5. NO
DK
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.**

HRS 2014 - Section T

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_ValueLifeIns

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

[IWER: DO NOT PROBE DK/RF]

_____, GO TO T190
AMOUNT

DK
RF

T187-T189

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
[1 (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. YES
 - 5. NO, GO TO T206
 - DK, GO TO T206
 - 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
DK
RF

YEAR:
T192

DK
RF

T193_

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

1. YES
5. NO
DK
RF

T194

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

1. YES
5. NO
DK
RF

T195_

Did these instructions express a desire to have any treatment withheld

1. YES
5. NO
DK
RF

T196_

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

1. YES
5. NO
DK
RF

T197_

Were these instructions applicable to the actual situation?

1. YES
5. NO, GO TO T206
DK, GO TO T206
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
DK
RF

T199_

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

1. YES
5. NO, GO TO T204
DK , GO TO T204
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) T201
 - DK
 - RF

T201_

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

[IWER: CHOOSE ALL THAT APPLY]

Anyone else?

OTHER (SPECIFY)

HRS 2014 - Section T

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

T202

(Which child was that?)

IF GRANDCHILD:

(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) [T203]

DK

RF

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

T203_

(Which child was that?)

IF GRANDCHILD:

(Which child is the parent of that grandchild?)

[IWER: CHOOSE ALL THAT APPLY]

OTHER (SPECIFY)

T204_

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

1. YES
5. NO, GO TO T206
DK, GO TO T206
RF, GO TO T206

T205_

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

1. YES
5. NO
DK
RF

T206_DOPAssigned

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, GO TO T213
DK, GO TO T213
RF, GO TO T213

T207M

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) T208
 - DK
 - RF

T208_

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

[IWER: CHOOSE ALL THAT APPLY]

OTHER (SPECIFY)

HRS 2014 - Section T

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

T061_T209MTemp

(Which child was that?)

IF GRANDCHILD:

(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

97. OTHER (SPECIFY) [T210]

DK

RF

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

T210_

(Which child was that?)

IF GRANDCHILD:

(Which child is the parent of that grandchild?)

[IWER: CHOOSE ALL THAT APPLY]

OTHER (SPECIFY)

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
DK
RF

T212
YEAR:
DK
RF

T212_

When was the Durable Power of Attorney for Health Care made (approximately)?

(T212) YEAR

T213_RDiscussInstr

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, GO TO T218
 - DK, GO TO T218
 - 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) T215
 - DK
 - RF
-

T215_

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

[IWER: CHOOSE ALL THAT APPLY]

OTHER (SPECIFY)

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

T216

(Which child was that?)

IF GRANDCHILD:

(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) [T217]

DK

RF

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

T217_

(Which child was that?)

IF GRANDCHILD:

(Which child is the parent of that grandchild?)

[IWER: CHOOSE ALL THAT APPLY]

OTHER (SPECIFY)

T218_InstNecessary

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, GO TO T237
DK, GO TO T237
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) T220
- DK
- RF

T220_

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?)

OTHER (SPECIFY)

HRS 2014 - Section T

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

T221

(Which child was that?)

IF GRANDCHILD:

(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) [T222]

DK

RF

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

T222

(Which child was that?)

IF GRANDCHILD:

(Which child is the parent of that grandchild?)

[IWER: CHOOSE ALL THAT APPLY]

OTHER (SPECIFY)

HRS 2014 - Section T

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

T223_R AbleDecisions

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, GO TO T227
5. NO
DK, GO TO T227
RF, GO TO T227

T224_

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

T224
MONTHS OR

DK
RF

T225_

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

DAYS

T226_

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

YEAR

HRS 2014 - Section T

T227 BRANCHPOINT: IF AT LEAST TWO {PEOPLE OR CATEGORY OF PERSON} PARTICIPATED IN THE DECISIONS ({ AMONG QUESTIONS T219, T221} AND T223} 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)
- DK
- RF

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

T244S

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

OTHER (SPECIFY)

HRS 2014 - Section T

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

T243_T228_Temp

(Which child was that?)

IF GRANDCHILD:

(Which child is the parent of that grandchild?)

CHILD NAME(S)

[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]

3. THROUGH 52. CHILD NAME(S)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

92. DECEASED CHILD

97. OTHER (SPECIFY) [T229]

DK

RF

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

T229_

(Which child was that?)

IF GRANDCHILD:

(Which child is the parent of that grandchild?)

OTHER (SPECIFY)

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
DK
RF

T231_

Did those last decisions involve limiting care in certain situations?

1. YES
5. NO
DK
RF

T232_

Did those last decisions involve withholding any treatment?

1. YES
5. NO
DK
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
DK
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, GO TO T236
DK, GO TO T236
RF, GO TO T236

T235_

Did R's FIRST NAME receive this treatment anyway?

1. YES
5. NO
DK
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
DK
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