

BRANCHPOINT:

1. IF R WAS NOT INTERVIEWED IN PREVIOUS WAVE, GO TO N50.
2. IF R IS NOT THE FINANCIAL R, GO TO N50.
3. IF R WAS INTERVIEWED IN THE PREVIOUS WAVE AND DID NOT REPORT OWNING A HOME, GO TO N11.

N1. Now I'd like to ask you some questions about the changes in your (family's) finances over the past two years. (Since WAVE 2 MONTH, YEAR/In the last two years), have you (or your (husband/wife/partner)) bought or sold a home that was your primary residence or second home?

INAP.....BLANK
 YES.....1
 NO.....5 ØN9
 DK.....8 ØN9
 RF.....9 ØN9

N1a. Did you only buy, only sell, both buy and sell, or what?

INAP.....BLANK
 ONLY BOUGHT.....1 ØN9
 ONLY SOLD.....2
 BOTH BOUGHT AND SOLD.....3
 OTHER (SPECIFY).....7 ØN9
 DK.....8 ØN9
 RF.....9 ØN9

N1b. In what month and year did you most recently sell a home?

MONTH:

INAP.....BLANK
 JAN.....1
 FEB.....2
 MAR.....3
 APR.....4
 MAY.....5
 JUN.....6
 JUL.....7
 AUG.....8
 SEP.....9
 OCT.....10
 NOV.....11
 DEC.....12
 DK.....98
 RF.....99

YEAR:

BLANK	INAP
1993-1996	YEAR
9998	DK
9999	RF

N2. What was the selling price?

DO NOT PROBE DK

BLANK INAP
 1-9999996 DOLLAR AMOUNT (EXPECTED RANGE \$5,000-\$250,000)
 9999998 DK
 9999999 RF

BRANCHPOINT: IF VALID AMOUNT GIVEN IN N2 (ANSWER OTHER THAN DK/RF), GO TO N3a.

N2a. Did it amount to \$50,000 or more?

INAP.....BLANK
 YES.....1
 NO.....5 ØN2c
 DK.....8 ØN3a
 RF.....9 ØN3a

N2b. (Did it amount to) \$200,000 or more?

INAP.....BLANK Ø N3a
 YES.....1 Ø N3a
 NO.....5 Ø N3a
 DK.....8 Ø N3a
 RF.....9 Ø N3a

N2c. (Did it amount to) \$15,000 or more?

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

N3a. In what month and year did you buy that home?

MONTH:

INAP.....BLANK
 JAN.....1
 FEB.....2
 MAR.....3
 APR.....4
 MAY.....5
 JUN.....6
 JUL.....7
 AUG.....8
 SEP.....9
 OCT.....10
 NOV.....11
 DEC.....12
 DK.....98
 RF.....99

YEAR:

BLANK INAP
 1900-1996 YEAR
 9998 DK
 9999 RF

N4. What was the purchase price?

DO NOT PROBE DK

BLANK INAP
 1-9999996 DOLLAR AMOUNT (EXPECTED RANGE \$5,000-\$250,000)
 9999998 DK
 9999999 RF

BRANCHPOINT: IF VALID AMOUNT GIVEN IN N4 (ANSWER OTHER THAN DK/RF), GO TO N5.

N4a. Did it amount to \$50,000 or more?

INAP.....BLANK
 YES.....1
 NO.....5 ØN4c
 DK.....8 ØN5
 RF.....9 ØN5

N4b. (Did it amount to) \$200,000 or more?

INAP.....BLANK ØN5
 YES.....1 ØN5
 NO.....5 ØN5
 DK.....8 ØN5
 RF.....9 ØN5

N4c. (Did it amount to) \$15,000 or more?

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

N5. (Since WAVE 2 MONTH, YEAR/In the last two years), have you sold any other home that was your primary or secondary residence?

INAP.....BLANK
 YES.....1
 NO.....5 ØN9
 DK.....8 ØN9
 RF.....9 ØN9

N5a. In what month and year was this other home sold?
 IF MORE THAN ONE, RECORD THE MOST RECENT SALE

MONTH:

INAP.....BLANK
 JAN.....1
 FEB.....2
 MAR.....3
 APR.....4
 MAY.....5
 JUN.....6
 JUL.....7
 AUG.....8
 SEP.....9
 OCT.....10
 NOV.....11
 DEC.....12
 DK.....98
 RF.....99

YEAR:

BLANK INAP
 1993-1996 YEAR
 9998 DK
 9999 RF

N6. What was the selling price?

DO NOT PROBE DK

BLANK INAP
 1-9999996 DOLLAR AMOUNT (EXPECTED RANGE \$5,000-\$250,000)
 9999998 DK
 9999999 RF

BRANCHPOINT: IF VALID AMOUNT GIVEN IN N6 (ANSWER OTHER THAN DK/RF), GO TO N7a.

N6a. Did it amount to \$50,000 or more?

INAP.....BLANK
 YES.....1
 NO.....5 ØN6c
 DK.....8 ØN7a
 RF.....9 ØN7a

N6b. (Did it amount to) \$200,000 or more?

INAP.....BLANK ØN7a
 YES.....1 ØN7a
 NO.....5 ØN7a
 DK.....8 ØN7a
 RF.....9 ØN7a

N6c. (Did it amount to) \$15,000 or more?

INAP.....BLANK
 YES.....1
 NO.....5
 DK.....8

RF.....9

N7a. And when did you buy that home?

MONTH:

INAP.....BLANK
 JAN.....1
 FEB.....2
 MAR.....3
 APR.....4
 MAY.....5
 JUN.....6
 JUL.....7
 AUG.....8
 SEP.....9
 OCT.....10
 NOV.....11
 DEC.....12
 DK.....98
 RF.....99

YEAR:

BLANK INAP
 1900-1996 YEAR
 9998 DK
 9999 RF

N8. What was the purchase price?

DO NOT PROBE DK

BLANK INAP
 1-9999996 DOLLAR AMOUNT (EXPECTED RANGE \$5,000-\$250,000)
 9999998 DK
 9999999 RF

BRANCHPOINT: IF VALID AMOUNT GIVEN IN N8 (ANSWER OTHER THAN DK/RF), GO TO N9.

N8a. Did it amount to \$50,000 or more?

INAP.....BLANK
 YES.....1
 NO.....5 ØN8c
 DK.....8 ØN9
 RF.....9 ØN9

N8b. (Did it amount to) \$200,000 or more?

INAP.....BLANK ØN9
 YES.....1 ØN9
 NO.....5 ØN9
 DK.....8 ØN9
 RF.....9 ØN9

N8c. (Did it amount to) \$15,000 or more?

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

N9. (Since WAVE 2 MONTH, YEAR/In the last two years), did you (or your (husband/wife/partner)) make any major additions or home improvements to a primary residence (or second home) that you owned?

DO NOT COUNT GENERAL MAINTENANCE OR UPKEEP.

INAP.....BLANK
 YES.....1
 NO.....5 ØN11
 DK.....8 ØN11
 RF.....9 ØN11

N10. What was the dollar cost of these additions and improvements, plus the value of any work you may have done yourself?

DO NOT PROBE DK

BLANK INAP
 1-9999996 DOLLAR AMOUNT (EXPECTED RANGE \$1,000-\$10,000)
 9999998 DK
 9999999 RF

BRANCHPOINT: IF VALID AMOUNT GIVEN IN N10 (ANSWER OTHER THAN DK/RF), GO TO N11.

N10a. Did it amount to \$10,000 or more?

INAP.....BLANK
 YES.....1
 NO.....5 ØN10c
 DK.....8 ØN11
 RF.....9 ØN11

N10b. (Did it amount to) \$50,000 or more?

INAP.....BLANK ØN11
 YES.....1 ØN11
 NO.....5 ØN11
 DK.....8 ØN11
 RF.....9 ØN11

N10c. (Did it amount to) \$2,000 or more?

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

BRANCHPOINT: IF R DID NOT REPORT OWNING REAL ESTATE IN PREVIOUS WAVE OR IN THIS WAVE (J76 NOT = 1/2), GO TO N19.

N11. (Since WAVE 2 MONTH, YEAR/In the last two years), have you (or your (husband/wife/partner)) sold any real estate other than your principle residence or second home, such as land, or rental or investment property?

- INAP.....BLANK
- YES.....1 ØN13
- NO.....5
- DK.....8
- RF.....9

N11a. Have you bought any such real estate properties (since WAVE 2 MONTH, YEAR/in the last two years)?

- INAP.....BLANK
- YES.....1
- NO.....5 ØN17
- DK.....8 ØN17
- RF.....9 ØN17

N12. About how much in total did you pay for this real estate?

DO NOT PROBE DK

- BLANK INAP
- 1-9999996 DOLLAR AMOUNT (EXPECTED RANGE \$5,000-\$250,000)
- 9999998 DK
- 9999999 RF

BRANCHPOINT: IF VALID AMOUNT GIVEN IN N12 (ANSWER OTHER THAN DK/RF), GO TO N17.

N12a. Did it amount to \$200,000 or more?

- INAP.....BLANK
- YES.....1
- NO.....5 ØN12c
- DK.....8 ØN17
- RF.....9 ØN17

N12b. (Did it amount to) \$500,000 or more?

- INAP.....BLANK ØN17
- YES.....1 ØN17
- NO.....5 ØN17
- DK.....8 ØN17
- RF.....9 ØN17

N12c. (Did it amount to) \$50,000 or more?

- INAP.....BLANK
- YES.....1
- NO.....5
- DK.....8
- RF.....9

N13. Did you also buy any real estate of this sort
(since WAVE 2 MONTH, YEAR/in the last two years)?

INAP.....BLANK
 YES.....1 ØN15
 NO.....5
 DK.....8
 RF.....9

N14. About how much in total was the dollar value of the real estate
you sold (since WAVE 2 MONTH, YEAR/in the last two years)?

DO NOT PROBE DK

BLANK INAP
 1-9999996 DOLLAR AMOUNT (EXPECTED RANGE \$5,000-\$250,000)
 9999998 DK
 9999999 RF

BRANCHPOINT: IF VALID AMOUNT GIVEN IN N14 (ANSWER OTHER THAN DK/RF), GO TO N17.

N14a. Did it amount to \$200,000 or more?

INAP.....BLANK
 YES.....1
 NO.....5 ØN14c
 DK.....8 ØN17
 RF.....9 ØN17

N14b. (Did it amount to) \$500,000 or more?

INAP.....BLANK ØN17
 YES.....1 ØN17
 NO.....5 ØN17
 DK.....8 ØN17
 RF.....9 ØN17

N14c. (Did it amount to) \$50,000 or more?

INAP.....BLANK ØN17
 YES.....1 ØN17
 NO.....5 ØN17
 DK.....8 ØN17
 RF.....9 ØN17

N15. Overall, was the dollar cost of the real estate you bought greater than the
dollar value of what you sold (minus commissions), less than the value of
what you sold, about equal, or what?

PLEASE PROBE IF DK

INAP.....BLANK
 BOUGHT MORE THAN SOLD.....1
 BOUGHT LESS THAN SOLD.....2
 BOUGHT AND SOLD ABOUT EQUAL
 AMOUNTS.....3 ØN17
 DK.....8 ØN17
 RF.....9 ØN17

N16. Roughly, about how much (more/less) did you buy than you sold?

DO NOT PROBE DK

BLANK INAP
 1-999996 DOLLAR AMOUNT (EXPECTED RANGE \$1,000-\$50,000)
 999998 DK
 999999 RF

BRANCHPOINT: IF VALID AMOUNT GIVEN IN N16 (ANSWER OTHER THAN DK/RF), GO TO N17.

N16a. Did it amount to \$200,000 or more?

INAP.....BLANK
 YES.....1
 NO.....5 ØN16c
 DK.....8 ØN17
 RF.....9 ØN17

N16b. (Did it amount to) \$500,000 or more?

INAP.....BLANK ØN17
 YES.....1 ØN17
 NO.....5 ØN17
 DK.....8 ØN17
 RF.....9 ØN17

N16c. (Did it amount to) \$50,000 or more?

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

N17. (Since WAVE 2 MONTH, YEAR/In the last two years), did you (or your (husband/wife/partner)) make any major additions or home improvements to any real estate properties that you owned, other than your principle residence or second home?

DO NOT COUNT GENERAL MAINTENANCE OR UPKEEP.

INAP.....BLANK
 YES.....1
 NO.....5 ØN19
 DK.....8 ØN19
 RF.....9 ØN19

N18. What was the dollar cost of these additions and improvements, plus the value of any work you may have done yourself?

DO NOT PROBE DK

BLANK INAP
 1-999996 DOLLAR AMOUNT (EXPECTED RANGE \$1,000-\$100,000)
 999998 DK
 999999 RF

BRANCHPOINT: IF VALID AMOUNT GIVEN IN N18 (ANSWER OTHER THAN DK/RF), GO

TO N19.

N18a. Did it amount to \$10,000 or more?

INAP.....BLANK
 YES.....1
 NO.....5 ØN18c
 DK.....8 ØN19
 RF.....9 ØN19

N18b. (Did it amount to) \$50,000 or more?

INAP.....BLANK ØN19
 YES.....1 ØN19
 NO.....5 ØN19
 DK.....8 ØN19
 RF.....9 ØN19

N18c. (Did it amount to) \$2,000 or more?

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

BRANCHPOINT: IF R DID NOT REPORT OWNING A BUSINESS IN PREVIOUS WAVE OR IN THIS WAVE (J83 NOT = 1/2), GO TO N24.

N19. (Since WAVE 2 MONTH, YEAR/In the last two years), have you (or your (husband/wife/partner)) put personal funds into a privately held business, professional practice, partnership or farm that you own or share ownership in?

INAP.....BLANK
 YES.....1
 NO.....5 ØN21
 DK.....8 ØN21
 RF.....9 ØN21

N20. Altogether, about how much new money did you (or your (husband/wife/partner)) put into that, including any funds that you borrowed personally?

DO NOT PROBE DK

BLANK INAP
 1-9999996 DOLLAR AMOUNT (EXPECTED RANGE \$5,000-\$250,000)
 9999998 DK
 9999999 RF

BRANCHPOINT: IF VALID AMOUNT GIVEN IN N20 (ANSWER OTHER THAN DK/RF), GO TO N21.

N20a. Did it amount to \$50,000 or more?

INAP.....BLANK
 YES.....1
 NO.....5 ØN20c
 DK.....8 ØN21
 RF.....9 ØN21

N20b. (Did it amount to) \$500,000 or more?

INAP.....BLANK ØN21
 YES.....1 ØN21
 NO.....5 ØN21
 DK.....8 ØN21
 RF.....9 ØN21

N20c. (Did it amount to) \$5,000 or more?

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

N21. (Since WAVE 2 MONTH, YEAR/In the last two years), have you (or your (husband/wife/partner)) sold part or all of any interest in a privately held business, professional practice, partnership or farm?

INAP.....BLANK
 YES.....1
 NO.....5 ØN24
 DK.....8 ØN24
 RF.....9 ØN24

N22. Altogether, about how much did you (or your (husband/wife/partner)) sell your interest for? (What was the selling price?)

WE WANT THE PRICE THE BUYER PAID.

DO NOT PROBE DK

BLANK INAP
 1-9999996 DOLLAR AMOUNT (EXPECTED RANGE \$5,000-\$250,000)
 9999998 DK
 9999999 RF

BRANCHPOINT: IF VALID AMOUNT GIVEN IN N22 (ANSWER OTHER THAN DK/RF), GO TO N23a.

N22a. Did it amount to \$100,000 or more?

INAP.....BLANK
 YES.....1
 NO.....5 ØN22c
 DK.....8 ØN23a
 RF.....9 ØN23a

N22b. (Did it amount to) \$1,000,000 or more?

INAP.....BLANK ØN23a
 YES.....1 ØN23a
 NO.....5 ØN23a
 DK.....8 ØN23a
 RF.....9 ØN23a

N22c. (Did it amount to) \$10,000 or more?

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

N23a. In what month and year did you sell that?

MOST RECENT SALE, IF MORE THAN ONE.

MONTH:

INAP.....BLANK
 JAN.....1
 FEB.....2
 MAR.....3
 APR.....4
 MAY.....5
 JUN.....6
 JUL.....7
 AUG.....8
 SEP.....9
 OCT.....10
 NOV.....11
 DEC.....12
 DK.....98
 RF.....99

YEAR:

BLANK	INAP
1993-1996	YEAR
9998	DK
9999	RF

BRANCHPOINT: IF R DID NOT REPORT OWNING STOCKS IN PREVIOUS WAVE OR THIS WAVE (J207 NOT = 1), GO TO N28d.

N24. Not counting any IRAs, Keoghs or pension accounts, (since WAVE 2 MONTH, YEAR/in the last two years), have you (or your (husband/wife/partner)) bought any stock, or put money into stock mutual funds, including any automatic reinvestments?

INAP.....BLANK
 YES.....1
 NO.....5 ØN27
 DK.....8 ØN27
 RF.....9 ØN27

N24a. Did you (or your (husband/wife/partner)) also sell or cash in any such assets?

INAP.....BLANK
 YES.....1
 NO.....5 ØN26
 DK.....8 ØN26
 RF.....9 ØN26

N24b. Did you buy more or sell more -- that is, overall, did you put new money into stocks, stock mutual funds, managed investment accounts or trusts, take money out of them, or put in about as much as you took out?

PLEASE PROBE IF DK.

INAP.....BLANK
 PUT MONEY IN.....1
 TAKE MONEY OUT.....2
 PUT IN ABOUT AS MUCH AS TOOK OUT.....3 ØN28d
 DK.....8 ØN28d
 RF.....9 ØN28d

N25. About how much more did you (IF PUT MONEY IN ASSETS: put in than you took out? / IF TOOK MONEY OUT OF ASSETS: take out than you put in?)

DO NOT PROBE DK

BLANK INAP
 1-999996 DOLLAR AMOUNT (EXPECTED RANGE \$1,000-\$50,000)
 999998 DK
 999999 RF

BRANCHPOINT: IF VALID AMOUNT GIVEN IN N25 (ANSWER OTHER THAN DK/RF), GO TO N28d.

N25a. Did it amount to \$10,000 or more?

INAP.....BLANK
 YES.....1
 NO.....5 ØN25c
 DK.....8 ØN28d
 RF.....9 ØN28d

N25b. (Did it amount to) \$50,000 or more?

INAP.....BLANK ØN28d
 YES.....1 ØN28d
 NO.....5 ØN28d
 DK.....8 ØN28d
 RF.....9 ØN28d

N25c. (Did it amount to) \$2,500 or more?

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

BRANCHPOINT: IF R ANSWERED N25, GO TO N28d.

N26. Altogether, how much money (including any automatic reinvestment) did you (or your (husband/wife/partner)) put into that?

DO NOT PROBE DK

BLANK INAP
 1-999996 DOLLAR AMOUNT (EXPECTED RANGE \$1,000-\$100,000)
 999998 DK
 999999 RF

BRANCHPOINT: IF VALID AMOUNT GIVEN IN N26 (ANSWER OTHER THAN DK/RF), GO TO N28d.

N26a. Did it amount to \$25,000 or more?

INAP.....BLANK
 YES.....1
 NO.....5 ØN26c
 DK.....8 ØN28d
 RF.....9 ØN28d

N26b. (Did it amount to) \$100,000 or more?

INAP.....BLANK ØN28d
 YES.....1 ØN28d
 NO.....5 ØN28d
 DK.....8 ØN28d
 RF.....9 ØN28d

N26c. (Did it amount to) \$5,000 or more?

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

BRANCHPOINT: IF R ANSWERED N26, GO TO N28d.

N27. (Since WAVE 2 MONTH, YEAR/In the last two years), have you (or your (husband/wife/partner)) sold any shares of stock in publicly held corporations or taken money out of any mutual funds, managed investment accounts or trusts?

INAP.....BLANK
 YES.....1
 NO.....5 ØN28d
 DK.....8 ØN28d
 RF.....9 ØN28d

N28. Altogether, how much money did you (or your (husband/wife/partner)) get from that?

DO NOT PROBE DK

BLANK INAP
 1-999996 DOLLAR AMOUNT (EXPECTED RANGE \$1,000-\$100,000)
 999998 DK
 999999 RF

BRANCHPOINT: IF VALID AMOUNT GIVEN IN N28 (ANSWER OTHER THAN DK/RF), GO TO N28d.

N28a. Did it amount to \$25,000 or more?

INAP.....BLANK
 YES.....1
 NO.....5 ØN28c
 DK.....8 ØN28d
 RF.....9 ØN28d

N28b. (Did it amount to) \$100,000 or more?

INAP.....BLANK ØN28d
 YES.....1 ØN28d
 NO.....5 ØN28d
 DK.....8 ØN28d
 RF.....9 ØN28d

N28c. (Did it amount to) \$5,000 or more?

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

BRANCHPOINT:

1. IF R DID NOT OWN A HOME IN PREVIOUS WAVE OR GAVE A VALUE FOR PRIMARY RESIDENCE OR SECOND HOUSE IN THIS WAVE (F6 WAS ANSWERED OR F46f WAS ANSWERED), GO TO N29.

2. IF R REPORTED BUYING OR SELLING PRIMARY RESIDENCE OR SECOND HOME (N1 NOT = 5), GO TO N28e.

N28d. Our records show that you owned a home in (WAVE 2 MONTH, YEAR/the last two years) that you do not now own and did not sell. What happened to that home -- did you give it to someone, are our records incorrect, or what?

INAP.....BLANK ØN28e
 GAVE TO SOMEONE.....1
 RECORDS INCORRECT.....2 ØN28e
 OTHER.....7 ØN28e
 DK.....8 ØN28e
 RF.....9 ØN28e

N28f. Who did you give the house to, (that is what is their relationship to you)?

CHOOSE ALL THAT APPLY

INAP.....BLANK, ØN28e
 CHILD/CHILD-IN-LAW/GRANDCHILD.....2,
 OTHER RELATIVE.....3, ØN28e
 SOMEONE ELSE.....4, ØN28e
 DK.....8, ØN28e
 RF.....9, ØN28e

N28g. (Which child is that?)

(IF GRANDCHILD: Which child of yours (or your (husband/wife/partner)) is the parent of that grandchild?)

CHOOSE ALL THAT APPLY

CATI APPLICATION OFFERS CODED LIST OF CHILDREN, PLUS THESE CODES:

INAP.....BLANK,
 DECEASED CHILD.....010,
 ALL MY CHILDREN.....011,

BRANCHPOINT: IF R ONLY BOUGHT OR BOTH BOUGHT AND SOLD PRIMARY RESIDENCE/SECOND HOME (N1a NOT = 2), GO TO N29.

N28e. Our records show that you owned a home in (WAVE 2 MONTH, YEAR/the last two years) that you have since sold. What did you decide to do with the proceeds from selling the house -- did you invest the money, did you give it to someone, are our records incorrect, or what?

INAP.....BLANK
 INVEST THE MONEY.....1
 GAVE TO SOMEONE.....2
 RECORDS INCORRECT.....3
 OTHER.....7
 DK.....8
 RF.....9

BRANCHPOINT: IF NO ONE HAS MOVED INTO OR OUT OF THE HOUSEHOLD SINCE PREVIOUS WAVE OR PREVIOUS-WAVE R HAS NOT DIED, GO TO NASSIST.

N29. Sometimes changes in a family's savings or assets are due to people joining or leaving the family. Was there anyone living with you in (WAVE 2 MONTH, YEAR/the last two years) who doesn't live with you now and who took \$5,000 or more in assets or debts away with them?

INAP.....BLANK ØN31
 YES, ASSETS.....1
 YES, DEBTS.....2 ØN31
 BOTH.....3
 NO.....5 ØN32
 DK.....8 ØN31
 RF.....9 ØN31

N30. Altogether, what is the total dollar value of assets that were removed that way?

DO NOT PROBE DK

BLANK INAP
 1-9999996 DOLLAR AMOUNT (EXPECTED RANGE \$5,000-\$250,000)
 9999998 DK
 9999999 RF

BRANCHPOINT: IF VALID AMOUNT GIVEN IN N30 (ANSWER OTHER THAN DK/RF), GO TO N31.

N30a. Did it amount to \$25,000 or more?

INAP.....BLANK
 YES.....1
 NO.....5 ØN30c
 DK.....8 ØN31
 RF.....9 ØN31

N30b. (Did it amount to) \$100,000 or more?

INAP.....BLANK ØN31
 YES.....1 ØN31
 NO.....5 ØN31
 DK.....8 ØN31
 RF.....9 ØN31

N30c. (Did it amount to) \$10,000 or more?

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

BRANCHPOINT: IF ONLY ASSETS WERE REMOVED FROM HOUSEHOLD (N29 NOT = 2/3), GO TO N32.

N31. Altogether, what is the total dollar value of debts that were removed that way?

DO NOT PROBE DK

BLANK INAP
 1-9999996 DOLLAR AMOUNT (EXPECTED RANGE \$5,000-\$250,000)
 9999998 DK
 9999999 RF

BRANCHPOINT: IF VALID AMOUNT GIVEN IN N31 (ANSWER OTHER THAN DK/RF), GO TO N32.

N31a. Did it amount to \$10,000 or more?

INAP.....BLANK
 YES.....1
 NO.....5 ØN31c
 DK.....8 ØN32
 RF.....9 ØN32

N31b. (Did it amount to) \$25,000 or more?

INAP.....BLANK ØN32
 YES.....1 ØN32
 NO.....5 ØN32
 DK.....8 ØN32
 RF.....9 ØN32

N31c. (Did it amount to) \$5,000 or more?

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

N32. Is there anyone in your family living with you now who has joined the family (since WAVE 2 MONTH, YEAR/in the last two years) and who had \$5,000 or more in assets or debts at the time they joined the family?

INAP.....BLANK ØN34
 YES, ASSETS.....1
 YES, DEBTS.....2 ØN34
 BOTH.....3
 NO.....5 ØNASSIST
 DK.....8 ØN34
 RF.....9 ØN34

N33. Altogether, what was the total dollar value of assets that were brought into the family in that way?

DO NOT PROBE DK

BLANK INAP
 1-9999996 DOLLAR AMOUNT (EXPECTED RANGE \$5,000-\$250,000)
 9999998 DK
 9999999 RF

BRANCHPOINT: IF VALID AMOUNT GIVEN IN N33 (ANSWER OTHER THAN DK/RF), GO TO N34.

N33a. Did it amount to \$25,000 or more?

INAP.....BLANK
 YES.....1
 NO.....5 ØN33c
 DK.....8 ØN34
 RF.....9 ØN34

N33b. (Did it amount to) \$100,000 or more?

INAP.....BLANK ØN34
 YES.....1 ØN34
 NO.....5 ØN34
 DK.....8 ØN34
 RF.....9 ØN34

N33c. (Did it amount to) \$10,000 or more?

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

BRANCHPOINT: IF DEBTS WERE NOT BROUGHT INTO THE FAMILY BY A NEW FAMILY MEMBER (N32 NOT = 2/3), GO TO NASSIST.

N34. Altogether, what was the total dollar value of debts that were brought into the family in that way?

DO NOT PROBE DK

BLANK INAP
 1-9999996 DOLLAR AMOUNT (EXPECTED RANGE \$5,000-\$250,000)
 9999998 DK
 9999999 RF

BRANCHPOINT: IF VALID AMOUNT GIVEN IN N34 (ANSWER OTHER THAN DK/RF), GO TO NASSIST.

N34a. Did it amount to \$10,000 or more?

INAP.....BLANK
 YES.....1
 NO.....5 ØN34c
 DK.....8 ØNASSIST
 RF.....9 ØNASSIST

N34b. (Did it amount to) \$25,000 or more?

INAP.....BLANK ØNASSIST
 YES.....1 ØNASSIST
 NO.....5 ØNASSIST
 DK.....8 ØNASSIST
 RF.....9 ØNASSIST

N34c. (Did it amount to) \$5,000 or more?

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

NASSIST IWER:

HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS
 IN SECTION N - CAPITAL GAINS?

INAP.....BLANK
 NEVER.....1
 A FEW TIMES.....2
 MOST OR ALL OF THE TIME.....3

BRANCHPOINT: IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS NOT DIED AND R HAS NOT BEEN DIVORCED SINCE PREVIOUS WAVE, GO TO NEXT SECTION.

N50. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: Financial situations often change with the death of a (husband/wife). Thinking back to the time surrounding your (husband/wife)'s death, did any income from Social Security start, stop or change because of (his/her) death.) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: Financial situations often change with divorce. Thinking back to your divorce, did any income from Social Security start, stop, or change because of it?)

INAP.....BLANK
 START.....1
 STOP.....2 ØN50b
 CHANGE.....3 ØN50c
 NO.....5 ØN51
 DK.....8 ØN51
 RF.....9 ØN51

N50a. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: What was the usual amount after your (husband/wife)'s death?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: What was the usual amount after the divorce?)

BLANK INAP
 1-99996 DOLLAR AMOUNT
 99998 DK
 99999 RF

PER

INAP.....BLANK
 WEEK.....02
 EVERY TWO WEEKS/BI-WEEKLY.....03
 MONTH.....04
 YEAR.....06
 LUMP SUM.....95
 OTHER (SPECIFY).....97
 DK.....98
 RF.....99

BRANCHPOINT: IF SOCIAL SECURITY BENEFITS STARTED AFTER DEATH/DIVORCE (N50=1), GO TO N51.

N50b. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: What was the usual amount before your (husband/wife)'s death?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: What was the usual amount before the divorce?)

BLANK INAP
 1-99996 DOLLAR AMOUNT
 99998 DK
 99999 RF

PER

INAP.....BLANK
 WEEK.....02
 EVERY TWO WEEKS/BI-WEEKLY.....03
 MONTH.....04
 YEAR.....06
 LUMP SUM.....95
 OTHER (SPECIFY).....97
 DK.....98
 RF.....99

BRANCHPOINT: IF SOCIAL SECURITY BENEFITS DID NOT CHANGE AFTER DEATH/DIVORCE (N50 NOT = 3), GO TO N51.

N50c. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: What was the usual amount before your (husband/wife)'s death?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: What was the usual amount before the divorce?)

BLANK INAP
 1-99996 DOLLAR AMOUNT
 99998 DK
 99999 RF

PER

INAP.....BLANK
 WEEK.....02
 EVERY TWO WEEKS/BI-WEEKLY.....03
 MONTH.....04
 YEAR.....06
 LUMP SUM.....95
 OTHER (SPECIFY).....97
 DK.....98
 RF.....99

N50d. What was it after?

BLANK INAP
 1-99996 DOLLAR AMOUNT
 99998 DK
 99999 RF

PER

INAP.....BLANK
 WEEK.....02
 EVERY TWO WEEKS/BI-WEEKLY.....03
 MONTH.....04
 YEAR.....06
 LUMP SUM.....95
 OTHER (SPECIFY).....97
 DK.....98
 RF.....99

N51. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: Did any income from Supplemental Security Income start, stop, or change because of (his/her) death?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: Did any income from Supplemental Security Income start, stop, or change because of the divorce?)

INAP.....BLANK
 START.....1
 STOP.....2 ØN51b
 CHANGE.....3 ØN51c
 NO.....5 ØN52
 DK.....8 ØN52
 RF.....9 ØN52

N51a. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: What was the usual amount after your (husband/wife)'s death?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: What was the usual amount after the divorce?)

BLANK INAP
 1-99996 DOLLAR AMOUNT
 99998 DK
 99999 RF

PER

INAP.....BLANK
 WEEK.....02
 EVERY TWO WEEKS/BI-WEEKLY.....03
 MONTH.....04
 YEAR.....06
 LUMP SUM.....95
 OTHER (SPECIFY).....97
 DK.....98
 RF.....99

BRANCHPOINT: IF SUPPLEMENTAL SECURITY INCOME (SSI) STARTED AFTER DEATH/DIVORCE (N51=1), GO TO N52.

N51b. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: What was the usual amount before your (husband/wife)'s death?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: What was the usual amount before the divorce?)

BLANK INAP
 1-99996 DOLLAR AMOUNT
 99998 DK
 99999 RF

PER

INAP.....BLANK
 WEEK.....02
 EVERY TWO WEEKS/BI-WEEKLY.....03
 MONTH.....04
 YEAR.....06
 LUMP SUM.....95
 OTHER (SPECIFY).....97
 DK.....98
 RF.....99

BRANCHPOINT: IF SSI DID NOT CHANGE AFTER DEATH/DIVORCE (N51 NOT = 3), GO TO N52.

N51c. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: What was the usual amount before your (husband/wife)'s death?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: What was the usual amount before the divorce?)

BLANK INAP
 1-99996 DOLLAR AMOUNT
 99998 DK
 99999 RF

PER

INAP.....BLANK
 WEEK.....02
 EVERY TWO WEEKS/BI-WEEKLY.....03
 MONTH.....04
 YEAR.....06
 LUMP SUM.....95
 OTHER (SPECIFY).....97
 DK.....98
 RF.....99

N51d. What was it after?

BLANK INAP
 1-99996 DOLLAR AMOUNT
 99998 DK
 99999 RF

PER

INAP.....BLANK
 WEEK.....02
 EVERY TWO WEEKS/BI-WEEKLY.....03
 MONTH.....04
 YEAR.....06
 LUMP SUM.....95
 OTHER (SPECIFY).....97
 DK.....98
 RF.....99

N52. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: Did any income from Veterans benefits start, stop, or change because of (his/her) death?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: Did any income from Veterans benefits start, stop, or change because of the divorce?)

INAP.....BLANK
 START.....1
 STOP.....2 ØN52b
 CHANGE.....3 ØN52c
 NO.....5 ØN53
 DK.....8 ØN53
 RF.....9 ØN53

N52a. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: What was the usual amount after your (husband/wife)'s death?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: What was the usual amount after the divorce?)

BLANK INAP
 1-99996 DOLLAR AMOUNT
 99998 DK
 99999 RF

PER

INAP.....BLANK
 WEEK.....02
 EVERY TWO WEEKS/BI-WEEKLY.....03
 MONTH.....04
 YEAR.....06
 LUMP SUM.....95
 OTHER (SPECIFY).....97
 DK.....98
 RF.....99

BRANCHPOINT: IF VETERANS BENEFITS STARTED AFTER DEATH/DIVORCE (N52=1), GO TO N53.

N52b. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: What was the usual amount before your (husband/wife)'s death?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: What was the usual amount before the divorce?)

BLANK INAP
 1-99996 DOLLAR AMOUNT
 99998 DK
 99999 RF

PER

INAP.....BLANK
 WEEK.....02
 EVERY TWO WEEKS/BI-WEEKLY.....03
 MONTH.....04
 YEAR.....06
 LUMP SUM.....95
 OTHER (SPECIFY).....97
 DK.....98
 RF.....99

BRANCHPOINT: IF VETERANS BENEFITS DID NOT CHANGE AFTER DEATH/DIVORCE (N52 NOT = 3), GO TO N53.

N52c. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: What was the usual amount before your (husband/wife)'s death?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: What was the usual amount before the divorce?)

BLANK INAP
 1-99996 DOLLAR AMOUNT
 99998 DK
 99999 RF

PER

INAP.....BLANK
 WEEK.....02
 EVERY TWO WEEKS/BI-WEEKLY.....03
 MONTH.....04
 YEAR.....06
 LUMP SUM.....95
 OTHER (SPECIFY).....97
 DK.....98
 RF.....99

N52d. What was it after?

BLANK INAP
 1-99996 DOLLAR AMOUNT
 99998 DK
 99999 RF

PER

INAP.....BLANK
 WEEK.....02
 EVERY TWO WEEKS/BI-WEEKLY.....03
 MONTH.....04
 YEAR.....06
 LUMP SUM.....95
 OTHER (SPECIFY).....97
 DK.....98
 RF.....99

N53. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: Did any income from other retirement pensions or annuities start, stop, or change because of (his/her) death?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: Did any income from other retirement pensions or annuities start, stop, or change because of the divorce?)

INAP.....BLANK
 START.....1
 STOP.....2 ØN53b
 CHANGE.....3 ØN53c
 NO.....5 ØN54
 DK.....8 ØN54
 RF.....9 ØN54

N53a. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: What was the usual amount after your (husband/wife)'s death?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: What was the usual amount after the divorce?)

BLANK INAP
 1-99996 DOLLAR AMOUNT
 99998 DK
 99999 RF

PER

INAP.....BLANK
 WEEK.....02
 EVERY TWO WEEKS/BI-WEEKLY.....03
 MONTH.....04
 YEAR.....06
 LUMP SUM.....95
 OTHER (SPECIFY).....97
 DK.....98
 RF.....99

BRANCHPOINT: IF OTHER RETIREMENT PENSIONS OR ANNUITIES STARTED AFTER DEATH/DIVORCE (N53=1), GO TO N54.

N53b. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: What was the usual amount before your (husband/wife)'s death?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: What was the usual amount before the divorce?)

BLANK INAP
 1-99996 DOLLAR AMOUNT
 99998 DK
 99999 RF

PER

INAP.....BLANK
 WEEK.....02
 EVERY TWO WEEKS/BI-WEEKLY.....03
 MONTH.....04
 YEAR.....06
 LUMP SUM.....95
 OTHER (SPECIFY).....97
 DK.....98
 RF.....99

BRANCHPOINT: IF OTHER RETIREMENT PENSIONS OR ANNUITIES DID NOT CHANGE AFTER DEATH/DIVORCE (N53 NOT = 3), GO TO N54.

N53c. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: What was the usual amount before your (husband/wife)'s death?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: What was the usual amount before the divorce?)

BLANK INAP
 1-99996 DOLLAR AMOUNT
 99998 DK
 99999 RF

PER

INAP.....BLANK
 WEEK.....02
 EVERY TWO WEEKS/BI-WEEKLY.....03
 MONTH.....04
 YEAR.....06
 LUMP SUM.....95
 OTHER (SPECIFY).....97
 DK.....98
 RF.....99

N63d. What was it after?

BLANK INAP
 1-99996 DOLLAR AMOUNT
 99998 DK
 99999 RF

PER

INAP.....BLANK
 WEEK.....02
 EVERY TWO WEEKS/BI-WEEKLY.....03
 MONTH.....04
 YEAR.....06
 LUMP SUM.....95
 OTHER (SPECIFY).....97
 DK.....98
 RF.....99

N54. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: Did your earnings from work or your work hours start, stop, or change after (he/she) died?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: Did your earnings from work or your work hours start, stop or change after the divorce?)

INAP.....BLANK
 START.....1
 STOP.....2 ØN54b
 CHANGE.....3 ØN54d
 NO.....5 ØN56
 DK.....8 ØN56
 RF.....9 ØN56

N54a. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: What was the usual amount of your earnings after your (husband/wife)'s death?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: What was the usual amount of your earnings after the divorce?)

BLANK INAP
 1-99996 DOLLAR AMOUNT
 99998 DK
 99999 RF

PER

INAP.....BLANK
 WEEK.....02
 EVERY TWO WEEKS/BI-WEEKLY.....03
 MONTH.....04
 YEAR.....06
 LUMP SUM.....95
 OTHER (SPECIFY).....97
 DK.....98
 RF.....99

N72. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: And how many hours per week did you usually work after your (husband/wife)'s death?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: And how many hours per week did you usually work after the divorce?)

HOURS:

BLANK INAP
 1-80 HOURS
 98 DK
 99 RF

BRANCHPOINT: IF EARNINGS FROM WORK OR HOURS OF WORK STARTED AFTER DEATH/DIVORCE (N54=1), GO TO N56.

N54b. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: What was the usual amount of your earnings before your (husband/wife)'s death?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: What was the usual amount of your earnings before the divorce?)

BLANK INAP
 1-99996 DOLLAR AMOUNT
 99998 DK
 99999 RF

PER

INAP.....BLANK
 WEEK.....02
 EVERY TWO WEEKS/BI-WEEKLY.....03
 MONTH.....04
 YEAR.....06
 LUMP SUM.....95
 OTHER (SPECIFY).....97
 DK.....98
 RF.....99

N54c. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: And how many hours per week did you usually work before your (husband/wife)'s death?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: And how many hours per week did you usually work before the divorce?)

HOURS:

BLANK INAP
 1-80 HOURS
 98 DK
 99 RF

BRANCHPOINT: IF EARNINGS FROM WORK OR HOURS OF WORK DID NOT CHANGE AFTER DEATH/DIVORCE (N54 NOT = 3), GO TO N56.

N54d. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: What was the usual amount of your earnings before your (husband/wife)'s death?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: What was the usual amount of your earnings before the divorce?)

BLANK INAP
 1-99996 DOLLAR AMOUNT
 99998 DK
 99999 RF

PER

INAP.....BLANK
 WEEK.....02
 EVERY TWO WEEKS/BI-WEEKLY.....03
 MONTH.....04
 YEAR.....06
 LUMP SUM.....95
 OTHER (SPECIFY).....97
 DK.....98
 RF.....99

N54e. What was it after?

BLANK INAP
 1-99996 DOLLAR AMOUNT
 99998 DK
 99999 RF

PER

INAP.....BLANK
 WEEK.....02
 EVERY TWO WEEKS/BI-WEEKLY.....03
 MONTH.....04
 YEAR.....06
 LUMP SUM.....95
 OTHER (SPECIFY).....97
 DK.....98
 RF.....99

N55. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: How many hours per week did you usually work before your (husband/wife)'s death?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: How many hours per week did you usually work before the divorce?)

BLANK INAP
 1-80 HOURS
 98 DK
 99 RF

N55a. And how many after?

BLANK INAP
 1-80 HOURS
 98 DK
 99 RF

N56. (IF R'S PREVIOUS-WAVE SPOUSE/PARTNER HAS DIED: Did the type, cost, or coverage of your health insurance change as a result of your (husband/wife/partner)'s death?) (IF R HAS BEEN DIVORCED SINCE PREVIOUS WAVE: Did the type, cost, or coverage of your health insurance change from the divorce?)

INAP.....BLANK
 YES.....1
 NO.....5 ØN57
 DK.....8 ØN57
 RF.....9 ØN57

N56a. What changed about your health insurance?

CHOOSE ALL THAT APPLY

INAP.....BLANK,
 COST BECAME HIGHER.....01,
 COST BECAME LOWER.....02,
 FEWER SERVICES COVERED.....03,
 MORE SERVICES COVERED.....04,
 LESS CHOICE OF PHYSICIANS.....05,
 MORE CHOICE OF PHYSICIANS.....06,
 MORE CONVENIENT.....07,
 LOST PLAN.....08,
 OTHER.....97,
 DK.....98,
 RF.....99,

BRANCHPOINT: IF PREVIOUS-WAVE SPOUSE/PARTNER HAS NOT DIED, GO TO N64.

N57. Did you receive a life insurance settlement (including any that you may have already mentioned)?

INAP.....BLANK
 YES.....1
 NO.....5 ØN58
 DK.....8 ØN58
 RF.....9 ØN58

N57a. How much did it amount to?

BLANK INAP
 1-9999996 DOLLAR AMOUNT (EXPECTED RANGE \$5,000-\$250,000)
 9999998 DK
 9999999 RF

N58. Did you receive a lump-sum pension settlement?

INAP.....BLANK
 YES.....1
 NO.....5 ØN59
 DK.....8 ØN59
 RF.....9 ØN59

N58a. How much did it amount to?

BLANK INAP
 1-9999996 DOLLAR AMOUNT (EXPECTED RANGE \$5,000-\$250,000)
 9999998 DK
 9999999 RF

BRANCHPOINT: IF THIS IS NOT AN EXIT PROXY INTERVIEW, GO TO N63.

N59. (IF PROXY IS OTHER THAN WIFE/HUSBAND OF THE DECEDENT: I have a few questions about the circumstances of (his/her) death. Did (he/she) have an illness lasting three months or more during the last year (he/she) was live?) (IF PROXY IS WIFE/HUSBAND OF THE DECEDENT: Did your (husband/wife) have an illness lasting three months or more during the last year (he/she) was live?)

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

N60. Did (he/she) ever live in a nursing home?

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

N61. Not counting what was covered by Medicare or other insurance, (IF PROXY IS OTHER THAN WIFE/HUSBAND OF THE DECEDENT: all in all, about how much were (his/her) health care expenses during the last year of (his/her) life? / IF PROXY IS WIFE/HUSBAND OF THE DECEDENT: all in all, about how much were your (husband/wife)'s health care expenses during the last year of (his/her) life?) I mean all expenses for doctors, hospitals, drugs, nursing homes, or home care.

DO NOT PROBE DK

ALT-O NOT SETTLED YET

AMOUNT:

BLANK INAP
 1-99996 DOLLAR AMOUNT
 99998 DK
 99999 RF

BRANCHPOINT: IF VALID AMOUNT GIVEN IN N61 (ANSWER OTHER THAN DK/RF), GO TO N62.

N61a. Did it amount to \$5,000 or more?

INAP.....BLANK
 YES.....1
 NO.....5 ØN61d
 DK.....8 ØN62
 RF.....9 ØN62

N61b. (Did it amount to) \$25,000 or more?

INAP.....BLANK
 YES.....1
 NO.....5 ØN62
 DK.....8 ØN62
 RF.....9 ØN62

N61c. (Did it amount to) \$100,000 or more?

INAP.....BLANK ØN62
 YES.....1 ØN62
 NO.....5 ØN62
 DK.....8 ØN62
 RF.....9 ØN62

N61d. (Did it amount to) \$1,000 or more?

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

N62. (IF PROXY IS OTHER THAN WIFE/HUSBAND OF THE DECEDENT: Not counting what was covered by insurance or (his/her) estate, what were the expenses associated with the death, / IF PROXY IS WIFE/HUSBAND OF THE DECEDENT: Not counting what was covered by insurance or your (husband/wife)'s estate, what were your expenses associated with the death,) that is, for funeral expenses, legal fees, etc.?

DO NOT PROBE DK

ALT-O NOT SETTLED YET

AMOUNT:

BLANK INAP
 1-99996 DOLLAR AMOUNT
 99998 DK
 99999 RF

BRANCHPOINT: IF VALID AMOUNT GIVEN IN N62 (ANSWER OTHER THAN DK/RF), GO TO N63.

N62a. Did it amount to \$2,000 or more?

INAP.....BLANK
 YES.....1
 NO.....5 ØN62d
 DK.....8 ØN63
 RF.....9 ØN63

N62b. (Did it amount to) \$75,000 or more?

INAP.....BLANK
 YES.....1
 NO.....5 ØN63
 DK.....8 ØN63
 RF.....9 ØN63

N62c. (Did it amount to) \$200,000 or more?

INAP.....BLANK ØN63
 YES.....1 ØN63
 NO.....5 ØN63
 DK.....8 ØN63
 RF.....9 ØN63

N62d. (Did it amount to) \$1,000 or more?

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

N63. To pay the expenses associated with (his/her) illness and death, did you have to sell assets, withdraw money that normally would not be touched, get help from a relative, or do anything else special to find the money?

CHECK ALL THAT APPLY

- INAP.....BLANK, ØN63c
- YES, SELL ASSETS.....1, ØN63c
- YES, WITHDRAW MONEY.....2, ØN63c
- YES, GOT HELP FROM A RELATIVE.....3,
- DID NOT DO ANYTHING SPECIAL.....5, ØN63c
- YES, OTHER (SPECIFY).....7, ØN63c
- DK.....8, ØN63c
- RF.....9, ØN63c

N63a. Was that (a child or other) relative of yours (or your (husband/wife/partner)), or was it someone else who helped?

- INAP.....BLANK ØN63c
- CHILD/CHILD-IN-LAW/GRANDCHILD.....1
- OTHER RELATIVE.....2 ØN63c
- SOMEONE ELSE.....3 ØN63c
- INSTITUTION OR CHARITY.....7 ØN63c
- DK.....8 ØN63c
- RF.....9 ØN63c

N63b. (Which child is that?) (IF GRANDCHILD: Which child of yours (or your (husband/wife/partner)) is the parent of that grandchild?)

CATI APPLICATION OFFERS CODED LIST OF CHILDREN, PLUS THESE CODES:

- INAP.....BLANK,
- DECEASED CHILD.....010,
- ALL MY CHILDREN.....011,

N63c. (IF PROXY IS OTHER THAN WIFE/HUSBAND OF THE DECEDENT: In which state or country did (he/she) die? / (IF PROXY IS WIFE/HUSBAND OF THE DECEDENT: In which state or country did your (husband/wife) die?)

INAP.....BLANK
 ALASKA (AK).....1
 ALABAMA (AL).....2
 ARIZONA (AZ).....3
 ARKANSAS (AR).....4
 CALIFORNIA (CA).....5
 COLORADO (CO).....6
 CONNECTICUT (CT).....7
 DELAWARE (DE).....8
 FLORIDA (FL).....9
 GEORGIA (GA).....10
 HAWAII (HI).....11
 IDAHO (ID).....12
 ILLINOIS (IL).....13
 INDIANA (IN).....14
 IOWA (IA).....15
 KANSAS (KS).....16
 KENTUCKY (KY).....17
 LOUISIANA (LA).....18
 MAINE (ME).....19
 MARYLAND (MD).....20
 MASSACHUSETTS (MA).....21
 MICHIGAN (MI).....22
 MINNESOTA (MN).....23
 MISSISSIPPI (MS).....24
 MISSOURI (MO).....25
 MONTANA (MT).....26
 NEBRASKA (NE).....27
 NEVADA (NV).....28
 NEW HAMPSHIRE (NH).....29
 NEW JERSEY (NJ).....30
 NEW MEXICO (NM).....31
 NEW YORK (NY).....32
 NORTH CAROLINA (NC).....33
 NORTH DAKOTA (ND).....34
 OHIO (OH).....35
 OKLAHOMA (OK).....36
 OREGON (OR).....37
 PENNSYLVANIA (PA).....38
 RHODE ISLAND (RI).....39
 SOUTH CAROLINA (SC).....40
 SOUTH DAKOTA (SD).....41
 TENNESSEE (TN).....42
 TEXAS (TX).....43
 UTAH (UT).....44
 VERMONT (VT).....45
 VIRGINIA (VA).....46
 WASHINGTON (WA).....47
 WEST VIRGINIA (WV).....48
 WISCONSIN (WI).....49
 WYOMING (WY).....50
 WASHINGTON, D.C.....51
 PUERTO RICO.....52
 SAME STATE.....96
 OTHER / FOREIGN (SPECIFY).....97
 DK.....98
 RF.....99

N63d. What was the cause of (his/she) death?

(RECORD)

BRANCHPOINT:

- 1. IF THIS IS A PROXY INTERVIEW, GO TO N65.
- 2. IF R HAS NOT DIVORCED PREVIOUS-WAVE SPOUSE, GO TO N65.

N64. Because of the divorce, do you expect to receive less in the way of life insurance benefits if your former (husband/wife) dies?

- INAP.....BLANK
- YES.....1
- NO.....5
- DK.....8
- RF.....9

N65. Did you lose any part of your claim on your (former/late) (husband/wife)'s pension?

- INAP.....BLANK
- YES.....1
- NO.....5 ØN67
- DK.....8 ØN67
- RF.....9 ØN67

BRANCHPOINT: IF R HAS NOT DIVORCED PREVIOUS-WAVE SPOUSE, GO TO NEXT SECTION.

N66. Did you receive any money or property from your (former/late) (husband/wife) to compensate for the loss of your claim on (his/her) pension?

- INAP.....BLANK
- YES.....1
- NO.....5
- DK.....8
- RF.....9

N67. All in all, what were your expenses associated with the divorce, that is, legal fees and costs?

- BLANK INAP
- 1-999996 DOLLAR AMOUNT (EXPECTED RANGE \$500-\$25,000)
- 999998 DK
- 999999 RF

END OF SECTION N