

HRS 2020 -- SECTION T: WILLS, INSURANCE AND TRUSTS
FINAL VERSION -- 05/07/2020

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 TEXT IN TEAL IS SPECIFIC TO A WEB INTERVIEW.

ALL TEXT IN FUCHSIA IS SPECIFIC TO THE EXIT INTERVIEW.

THE CORE INTERVIEW IS DOCUMENTED USING BLACK TEXT, BUT BLACK TEXT CAN ALSO APPLY TO THE EXIT OR WEB INTERVIEW WHEN THERE ARE NO DIFFERENCES FROM THE CORE.

NOTE ABOUT BOLD/UNDERLINE TEXT:

ANY QUESTION THAT IS UNDERLINED IN THE B&A WILL APPEAR IN BOLD IN CAPI AND WILL BE UNDERLINED FOR CAWI.

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. SIMILARLY, A SPOUSE/PARTNER WHO WAS REPORTED IN A PREVIOUS WAVE BUT WHO HAS NEVER BEEN INTERVIEWED WILL NOT HAVE AN EXIT INTERVIEW.

SINCE EXIT INTERVIEW Rs ARE REINTERVIEW Rs, QUESTIONS NOT ASKED OF REINTERVIEW Rs ALSO ARE NOT ASKED OF EXIT Rs, UNLESS OTHERWISE NOTED.

MAJOR FLOW CONTROL, CONDITION AND FILL VARIABLES *

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

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

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

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

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

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

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

R's FIRST NAME (per X058)

HH's LAST IW MAIN RESIDENCE CITY (per X025), STATE (STATE ABBREVIATION)
(per X026);

HH's LAST IW 2ND RESIDENCE CITY (per X029), STATE (STATE ABBREVIATION)
(per X030)

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

R's Mother is Alive =x013=1 or F001=1

R's Father is Alive = X015=1 or F011=1

R's both parents are deceased (X013=5 AND X015=5) OR (F001 =5 AND F011 =5)

FOR FAMILY R, NUMBER OF GRANDCHILDREN FOR CORE FOR 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), POST-EXIT ONLY

ASK ABOUT WILL/TRUST ONLY (Z146=2), POST-EXT ONLY

ASK ABOUT BOTH HOME AND WILL/TRUST (Z146=3), POST-EXIT ONLY

R DISCUSSED MEDICAL CARE ARRANGEMENTS WITH OTHERS Y/N (Z245) CORE ONLY

R HAS DURABLE POWER OF ATTORNEY OR LIVING WILL (Z275) CORE ONLY

R MONTH OF DEATH (Z129) POST-EXIT ONLY

R YEAR OF DEATH (Z128) POST-EXIT ONLY

** 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.*

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

Wills

T001

Next we have some questions about wills, trusts and life insurance.

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

[INSTR: DO NOT INCLUDE LIVING WILLS. A LIVING WILL IS A TYPE OF HEALTH CARE ADVANCED DIRECTIVE THAT WE WILL ASK ABOUT SEPARATELY.]

- 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

Next we have some questions about wills, trusts and life insurance.

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

[INSTR: DO NOT INCLUDE LIVING WILLS. A LIVING WILL IS A TYPE OF HEALTH CARE ADVANCED DIRECTIVE THAT WE WILL ASK ABOUT SEPARATELY.]

- 1. YES, WILL ONLY
- 2. YES, BOTH WILL AND TRUST
- 3. NO, TRUST ONLY
- 5. NO, NEITHER WILL OR TRUST..... 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/spouse]]?

- 1. YES
- 5. NO..... GO TO T008
- DK..... GO TO T008
- RF..... GO TO T008

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

T003

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

- 1. YES
- 5. NO..... GO TO T006 BRANCHPOINT
- DK..... GO TO T006 BRANCHPOINT
- RF..... GO TO T006 BRANCHPOINT

T050_T004

M

(Which child is that?)

[INSTR: SELECT ALL THAT APPLY. IF R ONLY HAS ONE CHILD, SELECT THAT CHILD.]

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 BUT NOT DEAD CHILDREN ARE DISPLAYED. NAMES OF SPOUSE/PARTNERS OF CHILDREN ARE NOT DISPLAYED.

Which child is that?

[INSTR: SELECT ALL THAT APPLY. IF YOU ONLY HAVE ONE CHILD, PLEASE SELECT THAT CHILD THEN "NEXT" TO CONTINUE.]

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

98.DK

99.RF

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

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

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

IF R HAS ONLY ONE CHILD AND T004=96, GO TO T006 BRANCHPOINT

T005

Does that document provide for all your children about equally?

1. YES

5. NO

8. DK

9. RF

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

T006

Does that document include any grandchild directly?

- 1. YES
- 2. [VOL] ONLY THROUGH THEIR PARENTS
- 5. NO..... GO TO T008
- 8. DK..... GO TO T008
- 9. RF..... GO TO T008

Does that document include any grandchild directly?

- 1. YES
- 2. ONLY THROUGH THEIR PARENTS
- 5. NO..... GO TO T008
- 8. DK..... GO TO T008
- 9. RF..... GO TO T008

T051_T007

M

(Which of your children are the parents of those grandchildren?)

[INSTR: SELECT 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. UNLISTED CHILD WHO IS DECEASED

93. ALL CHILDREN

DK

RF

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

Which of your children are the parents of those grandchildren?

[INSTR: SELECT 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. UNLISTED CHILD WHO IS DECEASED

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?

[INSTR: 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?

[INSTR: PLEASE INCLUDE INDIVIDUAL POLICIES, GROUP POLICIES, OR PAID-UP POLICIES.]

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?

[INSTR: DO NOT PROBE DK/RF.]

\$ _____ .00 GO TO T017

DK

RF

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?

\$ _____ .00 GO TO T017

DK

RF

T014-T016

T014-T016 Unfolding Sequence

(Thinking about the amount of money the beneficiary would get:)

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

T014-T016 Unfolding Sequence

Thinking about the amount of money the beneficiary would get:

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_T017

M

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?

IF GRANDCHILD:

(Which of your children is are the parents of those grandchildren?)

[INSTR: SELECT ALL THAT APPLY.]

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

3. THROUGH 52. CHILD NAME(S)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

91. R'S SPOUSE/PARTNER [ONLY DISPLAY IF R IS MARRIED/PARTNERED]

92. UNLISTED CHILD WHO IS DECEASED

93. ALL CHILDREN

94. ALL GRANDCHILDREN EQUALLY

97. OTHER (SPECIFY) _____ [T045]

DK

RF

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

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?

IF GRANDCHILD:

Which child is the parent of that grandchild?

[INSTR: SELECT ALL THAT APPLY.]

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

3. THROUGH 52. CHILD NAME(S)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

91. -MY SPOUSE OR PARTNER [ONLY DISPLAY IF R IS MARRIED/PARTNERED]

92. UNLISTED CHILD WHO IS DECEASED

93. ALL CHILDREN

94. ALL GRANDCHILDREN EQUALLY

97. OTHER (SPECIFY) _____ [T045]

DK

RF

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

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: "Policies that build up a cash value" are sometimes called 'whole life' or 'straight life policies.'

1. YES

5. NO GO TO T031

8. DK GO TO T031

9. RF GO TO T031

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

T019

(How many such policies do you have?)

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

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]?

[INSTR: DO NOT PROBE DK/RF.]

\$ _____ .00 GO TO T024

- DK
- RF

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

\$ _____ .00 GO TO T024

- DK
- RF

T021-T023

T021-T023 Unfolding Sequence

(Thinking about the value of [these policies/this policy]:)

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

T021-T023 Unfolding Sequence

Thinking about the value of [these policies/this policy]:

Does it amount to less than \$____ , more than \$____ , or what?

PROCEDURES: 3Up, 2Up1Down, 1Up2Down

BREAKPOINTS: **\$2,500, \$25,000, \$50,000**, \$250,000

RANDOM ENTRY POINTS: \$2,500, \$25,000, \$50,000

ENTRY POINT ASSIGNMENT 1 or 2 or {NOT 1 and NOT 2} AT Z087

ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

T024

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

(Altogether,) about how much in total do you pay for this policy each month or year?

OTHERWISE:

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

[INSTR: ENTER "0" IF POLICY IS PAID UP OR THERE ARE NO PREMIUM PAYMENTS.]

DO NOT PROBE DK/RF

\$ _____ .00 GO TO T025

0 NO PREMIUM PAYMENTS GO TO T029 BRANCHPOINT

DK

RF

PER **(T025)**

1. MONTH

2. YEAR

DK

RF

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?

[INSTR: ENTER "0" IF POLICY IS PAID UP OR THERE ARE NO PREMIUM PAYMENTS.]

\$ _____ .00 GO TO T025

PER (T025)

1. MONTH

2. YEAR

DK

RF

T026-T028

T026-T028 Unfolding Sequence

(Thinking about how much you pay for [these policies/this policy]:)

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

T026-T028 Unfolding Sequence

Thinking about how much you pay for [these policies/this policy]:

Does it amount to less than \$_____ per month, more than \$_____ per month, or what?

PROCEDURES: 2Up2Down, 1Up3Down

BREAKPOINTS: \$20, \$50, **\$100, \$200**, \$400

RANDOM ENTRY POINTS: \$100, \$200

ENTRY POINT ASSIGNMENT 1 or {NOT 1} AT X501

ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

T025

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?

[INSTR: ENTER "0" IF POLICY IS PAID UP OR THERE ARE NO PREMIUM PAYMENTS.]

PER:

1. MONTH

2. YEAR

DK

RF

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?

[INSTR: ENTER "0" IF POLICY IS PAID UP OR THERE ARE 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_T029

M

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?

[INSTR: SELECT ALL THAT APPLY.]

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

3. THROUGH 52. CHILD NAME(S)

91. R'S SPOUSE/PARTNER

92. UNLISTED CHILD WHO IS DECEASED

93. ALL CHILDREN

94. ALL GRANDCHILDREN

97. OTHER (SPECIFY) _____ [T030]

DK

RF

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?

[INSTR: SELECT ALL THAT APPLY.]

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

3. THROUGH 52. CHILD NAME(S)

91. MY SPOUSE OR PARTNER

92. UNLISTED CHILD WHO IS DECEASED

93. ALL CHILDREN

94. ALL GRANDCHILDREN

97. OTHER (SPECIFY) _____ [T030]

DK

RF

!! 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)?

[INSTR: DO NOT PROBE DK/RF.]

\$ _____ .00 GO TO T036

DK

RF

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

\$ _____ .00 GO TO T036

DK

RF

T033-T035

T033-T035 Unfolding Sequence

(Thinking about the face value of (this policy/these policies):)

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

T033-T035 Unfolding Sequence

Thinking about the face value of (this policy/these policies):

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 T252 BRANCHPOINT

DK..... GO TO T252 BRANCHPOINT

RF..... GO TO T252 BRANCHPOINT

T037

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

[INSTR: DO NOT PROBE DK/RF.]

\$ _____ .00 GO TO T041

DK

RF

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

\$ _____ .00 GO TO T041

DK

RF

T038-T040

T038-T040 Unfolding Sequence

(Thinking about the total face value of the lapsed (policy/policies):)

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

T038-T040 Unfolding Sequence

Thinking about the total face value of the lapsed (policy/policies):

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 T252

BRANCHPOINT,

DK

RF

Was this lapse or cancellation something you chose to do, or was it done by the provider, your employer, or someone else?

- 1. MY CHOICE
- 2. PROVIDER OR EMPLOYER OR SOMEONE ELSE CHOSE GO TO T252 BRANCHPOINT
- DK
- RF

T042

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

- 1. ~~TOO~~ EXPENSIVE
- 2. ~~CO~~VERAGE NOT NEEDED
- 3. GOT NEW POLICY
- 4. TOOK THE CASH OUT
- 7. OTHER (SPECIFY) _____ [T048]
- DK
- RF

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. GOT NEW POLICY
- 4. TOOK THE CASH OUT
- 7. OTHER (SPECIFY) _____ [T048]
- DK
- RF

T043

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

- 1. YES
- 5. NO..... GO TO T252 BRANCHPOINT
- DK..... GO TO T252 BRANCHPOINT
- RF..... GO TO T252 BRANCHPOINT

T044

About how much cash did you receive?

\$ _____ .00

-
- DK
- RF

End of Life Decisions

T252 BRANCHPOINT: IF R IS LESS THAN 65 YEARS (A019<65), GO TO T254 BRANCHPOINT

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.

[INSTR: PRESS 1 TO CONTINUE.]

1. CONTINUE

NOTE: '1. CONTINUE' IS ONLY ACCEPTABLE RESPONSE.

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.

[INSTR: SELECT "NEXT" TO CONTINUE.]

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 cannot 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 IF R REPORTED ARRANGEMENT IN PREV WAVE (Z274=1)

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, I DON'T HAVE IT ANYMORE..... GO TO T250

DK..... GO TO T250

RF GO TO T250

1.YES

5.NO

DK..... GO TO T250

RF..... GO TO T250

NOTE: THE RESPONSES BELOW ARE ONLY SHOWN IF R REPORTED ARRANGEMENT IN PREV WAVE (Z274=1)

1. YES, I STILL HAVE SAME ARRANGEMENT

2. YES, BUT ARRANGEMENT HAS CHANGED

3. YES, I DO HAVE THIS ARRANGEMENT NOW BUT DID NOT HAVE IT LAST TIME

4. NO, I DO NOT HAVE SUCH AN ARRANGEMENT NOW AND DID NOT HAVE IT LAST TIME..... GO TO T250

5. NO, I DON'T HAVE IT ANYMORE..... GO TO T250

8. DK..... GO TO T250

9. RF..... GO TO T250

T247M

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

[INSTR: SELECT ALL THAT APPLY.]

- 3. SPOUSE OR PARTNER
- 4. CHILD, CHILD-IN LAW OR GRANDCHILD GO TO T248
- 5. OTHER RELATIVE
- 6. FRIEND
- 7. PHYSICIAN OR HEALTHCARE PROFESSIONAL
- 8. MINISTER, RABBI, PRIEST OR RELIGIOUS ADVISOR
- 9. ATTORNEY
- 10. SOCIAL WORKER
- 97. OTHER (SPECIFY) _____ (T249)
- DK
- RF

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

[INSTR: SELECT ALL THAT APPLY.]

- 3. MY SPOUSE OR PARTNER
- 4. CHILD, CHILD-IN-LAW OR GRANDCHILD GO TO T248
- 5. OTHER RELATIVE
- 6. FRIEND
- 7. PHYSICIAN OR HEALTHCARE PROFESSIONAL
- 8. MINISTER, RABBI, PRIEST OR RELIGIOUS ADVISOR
- 9. ATTORNEY
- 10. SOCIAL WORKER
- 97. OTHER (SPECIFY) _____ (T249)
- DK
- RF

T248 BRANCHPOINT: IF R DID NOT ANSWER CHILD/GRANDCHILD TO WHO HAS THAT AUTHORITY (T247 NOT 4), GO TO T250

T248/T066_
T248

(Which child was that?)

IF GRANDCHILD:

(Which child is the parent of that grandchild?)

[INSTR: SELECT 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. UNLISTED CHILD WHO IS DECEASED

93. ALL CHILDREN

97. OTHER (SPECIFY) _____ (T253)

98. DK

99. RF

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

Which child was that?

IF GRANDCHILD:

Which child is the parent of that grandchild?

[INSTR: SELECT 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. UNLISTED CHILD WHO IS DECEASED

93. ALL CHILDREN

97. OTHER (SPECIFY) _____ (T253)

98. DK

99. RF

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

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 cannot make those decisions yourself? This is sometimes called a "Living Will" or "Physician Orders for Life Sustaining Treatment".

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" or "Physician Orders for Life Sustaining Treatment".

Do you still have this arrangement in place?

[INSTR: "PHYSICIAN ORDERS FOR LIFE SUSTAINING TREATMENT" ARE SOMETIMES CALLED POLST. ANOTHER NAME FOR THE SAME ARRANGEMENT IS MOLST WHICH STANDS FOR "MEDICAL ORDERS FOR LIFE SUSTAINING TREATMENT".]

- 1. YES
- 5. NO..... GO TO T047 (T ASSIST)

NOTE: THE RESPONSES BELOW ARE ONLY SHOWN FOR "OTHERWISE" (Z275=2 or 3)

- 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 T047 (T ASSIST)
- 5. NO , I DON'T HAVE IT ANYMORE..... GO TO T047_(T ASSIST)
- 8. DK..... GO TO T047 (T ASSIST)
- 9. RF..... GO TO T047 (T ASSIST)

- 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 IF R REPORTED ARRANGEMENT IN PREV WAVE (Z275=3 or 3)

- 1. YES, I STILL HAVE SAME ARRANGEMENT
- 2. YES, BUT ARRANGEMENT HAS CHANGED
- 3. YES, I DO HAVE THIS ARRANGEMENT NOW BUT DID NOT HAVE IT LAST TIME
- 4. NO, I DO NOT HAVE SUCH AN ARRANGEMENT NOW AND DID NOT HAVE IT LAST TIME..... GO TO T047 (T ASSIST)
- 5. NO, I DON'T HAVE IT ANYMORE..... GO TO T047 (T ASSIST)
- 8. DK GO TO T047 (T ASSIST)
- 9. 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

T254 BRANCHPOINT: IF BOTH OF RS PARENTS ARE DECEASED ((X013=5 AND X015=5) OR (F001 IS ASKED AND =5 AND F011 IS ASKED AND =5)) , GO TO T047 BRANCHPOINT

T254

We are also interested in arrangements your [mother/father/parents] may have made regarding [her/his/their] future medical care.

[INSTR: SELECT "1" TO CONTINUE]

We are also interested in arrangements your [mother/father/parents] may have made regarding [her/his/their] future medical care.

[INSTR: SELECT "NEXT" TO CONTINUE]

- 1. CONTINUE

T255 BRANCHPOINT: If mother is alive [X013 = 1 and F001 = 1] continue, else go to T257 BRANCHPOINT

T255

IF R IS UNDER AGE 65 [A019<65]:

Has your mother made any legal arrangements for a specific person or persons to make decisions about her care or medical treatment if she cannot make those decisions herself? This is sometimes called a "Durable Power of Attorney for Health Care".

OTHERWISE (R AGE 65 OR OLDER)[A019 >65]:

Does your mother have a Durable Power of Attorney for Health Care?

1. YES

5. NOGO TO T257 BRANCHPOINT

T256

Who is that -- what is that person's relationship to your mother?

[INSTR: CHECK ALL THAT APPLY.]

[INSTR: IF R SAYS "CHILD", PROBE TO DETERMINE WHETHER THAT CHILD IS THE RESPONDENT OR RESPONDENT'S SIBLING OR BOTH.]

Who is that -- what is that person's relationship to your mother?

[INSTR: SELECT ALL THAT APPLY.]

1. Mother's spouse/partner

2. Child – R

3. Child – Sibling of R

4. Other person

1. Her spouse or partner

2. Me

3. One of my siblings

4. Other person

T257 BRANCHPOINT: If father is alive [X015 = 1 and F011 = 1] continue, else go to T047 BRANCHPOINT (TAssist)

T257

IF R IS LESS THAN 65 YEARS OF AGE AND MOTHER NOT ALIVE (X013=5 OR F001=5) (i.e., did not get T255):

Has your father made any legal arrangements for a specific person or persons to make decisions about his care or medical treatment if he cannot make those decisions himself? This is sometimes called a "Durable Power of Attorney for Health Care".

Does your father have a durable power of attorney for health care?

OTHERWISE R>= 65 OR(R< 65 AND MOTHER ALIVE(X013 NOT 5 AND F001=1)) (i.e., got T255):

Does your father have a Durable Power of Attorney for Health Care?

1. Yes
5. No ... GO TO T047 BRANCHPOINT (TAssist)

T258

Who is that -- what is that person's relationship to your father?

[INSTR: CHECK ALL THAT APPLY.]

[INSTR: IF R SAYS "CHILD", PROBE TO DETERMINE WHETHER THAT CHILD IS THE RESPONDENT OR RESPONDENT'S SIBLING OR BOTH.]

Who is that -- what is that person's relationship to your father?

[INSTR: SELECT ALL THAT APPLY.]

1. Father's spouse/partner
2. Child – R
3. Child – Sibling of R
4. Other person
1. His spouse or partner
2. Me
3. One of my siblings
4. Other person

T047 BRANCHPOINT: ASK IF THIS IS NOT A CAWI INTERVIEW, ELSE GO TO T101 BRANCHPOINT

T047

T ASSIST

[INSTR: 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

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

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/passed away)?

- 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

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

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)_____ [T103] GO TO T124 BRANCHPOINT
- DK..... GO TO T124 BRANCHPOINT
- RF..... GO TO T124 BRANCHPOINT

T104

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

[INSTR: SELECT 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_T105

M

IF CHILD (T104=2):
(Which child is that?)

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

[INSTR: SELECT 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. UNLISTED CHILD WHO IS DECEASED

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.

T107

IF R SOLD THE HOME (T102=2)

What was the selling price?

OTHERWISE:

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

[INSTR: DO NOT PROBE DK/RF.]

\$ _____ .00 GO TO T124 BRANCHPOINT

DK

RF

T108-T110

T108-T110 Unfolding Sequence

(Thinking about the [if T102=2: selling price/ otherwise: value] of that house:)

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

T111 BRANCHPOINT: GO TO T124 BRANCHPOINT

!! EXIT 1st HOME DISPOSAL AFTER DEATH

T111

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

IF PROXY IS THE SURVIVING SPOUSE/PARTNER (A009=2):

Do you own it now, was it sold, was it inherited by someone else, has it not yet been disposed of, or what?

IF {THIS IS NOT A POST-EXIT AND PROXY IS NOT R's SPOUSE/PARTNER AND R's SPOUSE/PARTNER IS STILL LIVING} (A023=1):

Does [his/her] [husband/wife/partner] own it now, was it sold, was it inherited by someone else, has it not yet been disposed of, or what?

OTHERWISE:

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

1. SURVIVING SPOUSE OR PARTNER STILL OWNS IT..... GO TO T124 BRANCHPOINT
2. SOLD..... GO TO T116
3. INHERITED
4. NOT YET DISPOSED..... GO TO T120
7. OTHER (SPECIFY) _____ [T112] GO TO T124 BRANCHPOINT
- DK..... GO TO T124 BRANCHPOINT
- RF..... GO TO T124 BRANCHPOINT

!! EXIT 1st HOME INHERITED

T113

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

[INSTR: SELECT 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

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

T055

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

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

[INSTR: SELECT 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. UNLISTED CHILD WHO IS DECEASED

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.

!! EXIT 1st HOME SOLD

T116

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

OTHERWISE:

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

[INSTR: DO NOT PROBE DK/RF.]

\$ _____ .00 GO TO T124 BRANCHPOINT

DK

RF

T117-T119

T117-T119 Unfolding Sequence

(Thinking about the [if T111=2: selling price/ otherwise: value] of that house:)

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

PROCEDURES: 1Up1Down, 2Down

BREAKPOINTS: \$15,000, **\$50,000, \$200,000**

RANDOM ENTRY POINTS: \$50,000, \$200,000

ENTRY POINT ASSIGNMENT 1 or {NOT 1} AT X503

ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

T120 BRANCHPOINT: GO TO T124 BRANCHPOINT

!! EXIT HOME NOT DISPOSED

T120

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

1. VACANT..... 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)?

[INSTR: SELECT 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

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

T056_T122

M

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

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

[INSTR: SELECT 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. UNLISTED CHILD WHO IS DECEASED

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.

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

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 (X029), STATE (STATE ABBREVIATION) (X030) [since [FINANCIAL R's LAST IW [MONTH,]YEAR/in the last two years before [his/her] death].

OTHERWISE, IF R's LAST IW SPOUSE/PARTNER WAS LIVING WHEN S/HE DIED (A023=1) and PROXY IS NOT A SURVIVING SPOUSE/PARTNER (A009 NOT 2):

Our records show that R's FIRST NAME and [his/her] [husband/wife/partner] owned a home in HH's LAST IW 2ND RESIDENCE CITY, STATE (STATE ABBREVIATION) [since [FINANCIAL R's LAST IW [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/passed away)?

- 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

Did R's FIRST NAME ever own it?

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

T240

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

- 1. GAVE TO SOMEONE..... GO TO T128
- 2. SOLD..... GO TO T131
- 7. OTHER (SPECIFY) _____ [T241] GO TO T148
- DK..... GO TO T148
- RF..... GO TO T148

!! EXIT 2ND HOME INHERITED BEFORE DEATH

T128

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

[INSTR: SELECT 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

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

T057_T129
M

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

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

[INSTR: SELECT 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. UNLISTED CHILD WHO IS DECEASED

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.

!! EXIT 2ND HOME SOLD BEFORE DEATH

T131

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

OTHERWISE:

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

[INSTR: DO NOT PROBE DK/RF.]

\$ _____ .00 GO TO T148

DK

RF

T132-T134

T132-T134 Unfolding Sequence

(Thinking about the [if T240=2: selling price/ otherwise: value] of that house:)

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

PROCEDURES: 1Up1Down, 2Down

BREAKPOINTS: \$15,000, **\$50,000**, **\$200,000**

RANDOM ENTRY POINTS: \$50,000, \$200,000

ENTRY POINT ASSIGNMENT 1 or {NOT 1} AT X504

ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

T135 BRANCHPOINT: GO TO T148

!! EXIT 2ND HOME DISPOSAL AFTER DEATH

T135

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

IF PROXY IS THE SURVIVING SPOUSE/PARTNER (A009=2):

Do you own it now, was it sold, was it inherited by someone else, has it not yet been disposed of, or what?

IF {PROXY IS NOT R's SPOUSE/PARTNER AND R's SPOUSE/PARTNER WAS STILL LIVING WHEN S/HE DIED} (A023=1):

Does [his/her] [husband/wife/partner] own it now, was it sold, was it inherited by someone else, has it not yet been disposed of, or what?

OTHERWISE:

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

1. SURVIVING SPOUSE STILL OWNS IT..... GO TO T148

2. SOLD..... GO TO T140

3. INHERITED

4. NOT YET DISPOSED..... GO TO T144

7. OTHER (SPECIFY) _____ [T136]

DK..... GO TO T148

RF..... GO TO T148

!! EXIT 2ND HOME INHERITED

T137

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

[INSTR: SELECT 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

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

T058_T138
M

IF CHILD (T137=2):
(Which child is that?)

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

[INSTR: SELECT 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. UNLISTED CHILD WHO IS DECEASED
- 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.

!! 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?

[INSTR: DO NOT PROBE DK/RF.]

\$ _____ .00 GO TO T148

DK

RF

T141-T143

T141-T143 Unfolding Sequence

(Thinking about the [if T135=2:selling price/otherwise:value] of that house:)

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

PROCEDURE: 1Up1Down

BREAKPOINTS: \$15,000, **\$50,000**, \$200,000

ENTRY POINT: \$50,000

T144 BRANCHPOINT: GO TO T148

!! EXIT 2ND HOME NOT DISPOSED YET

T144

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

1. VACANT..... 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)?

[INSTR: SELECT 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

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

T059_T146
M

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

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

[INSTR: SELECT 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. UNLISTED CHILD WHO IS DECEASED

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.

!! EXIT DEATH EXPENSES

T148

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

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

[INSTR: DO NOT PROBE DK/RF.]

[INSTR: ENTER 99996 IF NOT SETTLED YET.]

\$ _____ .00 GO TO T152

99996 NOT SETTLED YET..... GO TO T152

0..... GO TO T155 BRANCHPOINT

DK

RF

T149-T151

T149-T151 Unfolding Sequence

(Thinking about the total expenses associated with the death for things like the funeral, legal fees and so on

Do not include health care expenses:)

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?

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR PERCENTAGE.]

\$ _____ .00 OR _____ %

[T153]

[T154]

DK

RF

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

IF R PUT ASSETS INTO TRUST (T155=1):

In addition to the trust, did R's FIRST NAME have a will that was written and witnessed?

OTHERWISE:

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

1. YES

5. NO..... GO TO T161 BRANCHPOINT

DK..... GO TO T161 BRANCHPOINT

RF..... GO TO T161 BRANCHPOINT

T157

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

T158

In what state was it probated?

STATE

- 97. OTHER COUNTRY (SPECIFY) _____ [T159] GO TO T161 BRANCHPOINT
- 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.

T160

In what county was it probated?

COUNTY

- DK
- RF

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

!! EXIT DISTRIBUTION OF ASSETS

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) _____ [T162]
- DK
RF

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

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

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

T163

IF R HAD {A TRUST and/or A WILL} ({T155 and T156}=1 or T155=1 or T156=1):
Did [he/she] make provisions in [either the trust or the will/the trust/the will] for [you/[[his/her] [husband/wife/partner]]]?

OTHERWISE:

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

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

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

T902

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

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ _____ .00 GO TO T164 BRANCHPOINT
T902_1

OR

_____ % GO TO T164 BRANCHPOINT
T903_1

DK
RF

T904

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

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

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

T906

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

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

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)

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

T164

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

OTHERWISE:

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

- 1. YES
- 5. NO..... 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

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

[INSTR: 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

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

T166

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

- 1. YES
- 5. NO
- DK
- RF

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

T902

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)?

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ _____ .00 GO TO T168
T902_2

OR
_____ % GO TO T168
T903_2

- DK
- RF

T904

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

- 1. YES
- 5. NO..... GO TO T907_2
- DK..... GO TO T168
- RF..... GO TO T168

T905

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

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

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

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)

T902_3 LOOP BRANCHPOINT: GO TO T168

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

***BEGINNING OF BLOCK_3: AMOUNT TO EACH CHILD

T902

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?

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ _____ .00 GO TO END OF T902_3 LOOP (AFTER T908_3)
T902_3

OR

_____ % GO TO END OF T902_3 LOOP (AFTER T908_3)
T903_3

DK

RF

T904

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

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

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

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

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)

T168

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

OTHERWISE:

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

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

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

T902

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

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ _____ .00 GO TO T169
T902_4

OR

_____ GO TO T169
T903_4

- DK
- RF

T904

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

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

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

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

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

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

Altogether, how much did [his/her] brothers and sisters receive from [his/her] estate?

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ _____ .00 GO TO T170
T902_5

OR

_____ % GO TO T170
T903_5

DK
RF

T904

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

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

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

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

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

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

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

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ _____ .00 GO TO T171
T902_6

OR

_____ % GO TO T171
T903_6

DK
RF

T904

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

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

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

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

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

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

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

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ _____ .00 GO TO T172
T902_7

OR

_____ % GO TO T172
T903_7

- DK
- RF

T904

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

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

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

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

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

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

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

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ _____ .00 GO TO T173
T902_8

OR

_____ % GO TO T173
T903_8

DK
RF

T904

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

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

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

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

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

- 1. YES
- 5. NO
- DK
- RF

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

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

!! EXIT VALUE OF ESTATE

T173

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

[INSTR: DO NOT PROBE DK/RF.]

\$_____.00 GO TO T242 BRANCHPOINT

- DK
- RF

T174-T176

T174-T176 Unfolding Sequence

(Thinking about the total value of the estate, minus any life insurance:)

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

PROCEDURES: 3Up1Down, 2Up2Down, 1Up3Down

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

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

ENTRY POINT ASSIGNMENT [1 (\$100,000)] or [2 (\$25,000)] or

[[NOT 1 and NOT 2] (\$500,000)] AT X511

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

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

IF R OWNED RESIDENCE/MOBILE HOME/FARM IN HH's LAST IW (X079 =1), AND PROXY SAYS R NEVER OWNED HOME (T066 = 5), GO TO T177 BRANCHPOINT

T242

Does that include the value of the home?

1. YES

5. NO

DK

RF

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

!! EXIT ESTATE IN TRUST

T177

IF R PUT ASSETS INTO TRUST (T155=1):

Is any part of [his/her] estate still held in any type of a trust?

OTHERWISE:

Was any part of [his/her] estate put into a trust after [he/she] (died/passed away)?

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?

[INSTR: SELECT ALL THAT APPLY.]

DEFINITION: A trustee is a person who administers 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

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

T065_T180

MTemp

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

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

[INSTR: SELECT 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. UNLISTED CHILD WHO IS DECEASED

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.

!! EXIT LIFE INSURANCE SETTLEMENT

T181_HaveL
ifeln

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?

[INSTR: SELECT ALL THAT APPLY.]

1. SPOUSE/PARTNER

2. CHILDR(EN)

3. GRANDCHILD(REN) OR GREAT-GRANDCHILD(REN)

4. OTHER RELATIVE(S)

7. OTHER (SPECIFY) _____ [T183]

DK

RF

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

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

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

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

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

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ _____ .00 GO TO T902_11 BRANCHPOINT
T902_9

OR

_____ % GO TO T902_11 BRANCHPOINT
T903_9

DK

RF

T904

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

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

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)**

***** 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

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

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ _____ .00 GO TO END OF T902_10 LOOP (AFTER T908_10)
T902_10

OR

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

DK

RF

T904

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

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

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

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

OTHERWISE, GO TO T902_12 BRANCHPOINT

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

T902_11

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

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ _____ .00 GO TO T902_12 BRANCHPOINT
T902_11

OR

_____ % GO TO T902_12 BRANCHPOINT
T903_11

- 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_More

25

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)

T902_12 BRANCHPOINT: IF R's LIFE INSURANCE BENEFICIARY WAS OTHER RELATIVE(S)
(T182=4)}, CONTINUE ON TO T902_12

OTHERWISE, GO TO T902_13 BRANCHPOINT

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

T902

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

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ _____ .00 GO TO T902_13 BRANCHPOINT
T902_12

OR

_____ % GO TO T902_13 BRANCHPOINT
T903_12

T904

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

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)

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?

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ _____ .00 GO TO T186 BRANCHPOINT
T902_13

OR

_____ % GO TO T186 BRANCHPOINT
T903_13

- 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

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.

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

T186

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

[INSTR: DO NOT PROBE DK/RF.]

\$_____ .00 GO TO T190

- DK
- RF

T187-T189

T187-T189 Unfolding Sequence

(Thinking about the value of the life insurance settlement:)

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

PROCEDURES: 3Up1Down, 2Up2Down, 1Up3Down

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

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

ENTRY POINT ASSIGNMENT: [1 (\$100,000)] or [2 (\$25,000)] or

[{NOT 1 and NOT 2} (\$500,000)] AT X512

ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

!! EXIT HEALTH CARE DECISIONS

T190

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

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

1. 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:

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

YEAR:

T192

- DK
- RF

T192
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)?

[INSTR: SELECT ALL THAT APPLY.]

[INSTR: IF NECESSARY, PROBE: 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

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

T060_T202

(Which child was that?)

IF GRANDCHILD:

(Which child is the parent of that grandchild?)

[INSTR: SELECT 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. UNLISTED CHILD WHO IS DECEASED
 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.

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

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)?

[INSTR: SELECT 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

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

T061_T209

(Which child was that?)

IF GRANDCHILD:

(Which child is the parent of that grandchild?)

[INSTR: SELECT 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. UNLISTED CHILD WHO IS DECEASED

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.

T211

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

T211

MONTH:

1. JAN

2. FEB

3. MAR

4. APR

5. MAY

6. JUN

7. JUL

8. AUG

9. SEP

10. OCT

11. NOV

12. DEC

98. DK

99. RF

YEAR:

T212

DK

RF

T212

T213

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

- 1. YES
- 5. NO..... 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)?

[INSTR: SELECT 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

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

T062_T216

(Which child was that?)

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

[INSTR: SELECT 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. UNLISTED CHILD WHO IS DECEASED
- 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.

T218

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

- 1. YES
- 5. NO..... 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?)

[INSTR: SELECT 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

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

T063_T221

(Which child was that?)

IF GRANDCHILD:

(Which child is the parent of that grandchild?)

[INSTR: SELECT 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. UNLISTED CHILD WHO IS DECEASED

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.

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

T223

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/passed away) was [he/she] unable to participate in decisions about [his/her] medical care?

MONTHS

T224

OR

DAYS

T225

OR

YEAR

T226

DK

RF

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)_____ [T244]
- DK
- RF

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

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

IF {PROXY GAVE ONLY 1 RESPONSE TO T221 and THAT RESPONSE WAS NOT "ALL CHILDREN" (T221 NOT 93)}, GO TO T230

T243_T228

(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. UNLISTED CHILD WHO IS DECEASED
- 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.

!! 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

T259

On a scale of zero to 10, where zero is the worst possible and 10 is the best possible, in your opinion, how would you rate the overall quality of [deceased R's] last week of life?

T237

Thinking back over the course of [R NAME]'s life, what would you say were [Hhis/her] greatest strengths?

IF THIS IS AN EXIT INTERVIEW, GO TO MODULES