

NLSY97 Round 1 Parent Questionnaire

01/09/97

THE OHIO STATE UNIVERSITY
CENTER FOR HUMAN RESOURCE RESEARCH

CAPI

(PARENT QUESTIONNAIRE VERSION: 01/03/1997, 8:00 AM)

Income

[P5-002]

We now have some questions about your household's income during the last calendar year, that is 1996. We appreciate that our questions are difficult to answer and sometimes seem intrusive. As with other questions in this survey, we want to reassure you that the information you provide to us is kept confidential.

Lead In: P4-027[Default] P4-029[Default]
Default Next Question: P5-003

[P5-003]

(%parent.marstat%=1) OR (%parent.spouseinhh%=1) OR (%parent.partnerinhh%=1);

/* is resp married or living with partner */

Branch Conditions...
1 : Go To P5-009

Lead In: P5-002[Default]
Default Next Question: P5-004

[P5-004]

Now I would like to ask you some questions about your earnings and income last year in 1996.

Lead In: P5-003[Default]
Default Next Question: P5-010

[P5-009]

Now I would like to ask you some questions about the earnings and income you and your %P5i_sp/par% received last year, that is during 1996. I'll ask you first about your earnings and business income and then the earnings and business income of your %P5i_sp/par%.

Lead In: P5-003[Default]
Default Next Question: P5-010

[P5-010]

During 1996, did you receive any income from a job such as wages, salary, commissions, or tips? Please include any income you receive from service in the military, the military reserves or the National Guard.

1 YES
0 NO (Go To P5-018)

Refusal(-1) (Go To P5-012)
DONT KNOW(-2) (Go To P5-011)

Lead In: P5-004[Default] P5-009[Default]
Default Next Question: P5-016

[P5-011]

By income we mean money you received by working for someone else such as wages, a salary, commissions or tips. Did you have any income from any jobs during 1996?

1 YES
0 NO (Go To P5-018)

Refusal(-1) (Go To P5-012)
DONT KNOW(-2) (Go To P5-018)

Lead In: P5-010[-2:-2]
Default Next Question: P5-016

[P5-012]

I know some questions are difficult to answer and sometimes seem intrusive. As I said before the information you provide to us is kept confidential. Did you have any income from any jobs during 1996?

1 YES
0 NO (Go To P5-018)

Refusal(-1) (Go To P5-018)
DONT KNOW(-2) (Go To P5-018)

Lead In: P5-011[-1:-1] P5-010[-1:-1]
Default Next Question: P5-016

[P5-016]

During 1996, how much income did you receive from wages, salary, commissions, or tips from all jobs, before deductions for taxes or anything else?

Refusal(-1) (Go To P5-017)
DONT KNOW(-2) (Go To P5-017)

Lead In: P5-010[Default] P5-011[Default] P5-012[Default]
Default Next Question: P5-018

[P5-017]

(HAND CARD D)

Please look at this card. Can you tell me the letter of the category that corresponds to the range that includes the amount you received last year in

wages, salary, commissions and tips?

- 1 A. \$1 - \$5,000
- 2 B. \$5,001 - \$10,000
- 3 C. \$10,001 - \$25,000
- 4 D. \$25,001 - \$50,000
- 5 E. \$50,001 - \$100,000
- 6 F. \$100,001 - \$250,000
- 7 G. More than \$250,000

Lead In: P5-016[-2:-1]
Default Next Question: P5-018

[P5-018]

(Excluding any income you already have mentioned) During 1996, did you receive any money in income from your own farm, business, partnership or professional practice?

- 1 YES (Go To P5-019)
- 0 NO

Lead In: P5-016[Default] P5-017[Default] P5-011[0:0] P5-011[-2:-2] P5-012[-2:0]
P5-010[0:0]
Default Next Question: P5-021

[P5-019]

During 1996, how much income did you receive from your own farm, business, partnership or professional practice AFTER EXPENSES?

(IF RESPONDENT LOST MONEY ON OWN FARM, BUSINESS, PARTNERSHIP OR PROFESSIONAL PRACTICE AFTER EXPENSES ENTER NEGATIVE VALUE)

- Refusal(-1) (Go To P5-020)
- DONT KNOW(-2) (Go To P5-020)

Lead In: P5-018[1:1]
Default Next Question: P5-021

[P5-020]

(HAND CARD E)

Please look at this card. Can you tell me the letter of the category that corresponds to the range that includes the amount you received last year from your own farm after expenses?

- 1 A. LOST/WOULD LOSE MONEY
- 2 B. \$1 - \$5,000
- 3 C. \$5,001 - \$10,000
- 4 D. \$10,001 - \$25,000
- 5 E. \$25,001 - \$50,000

- 6 F. \$50,001 - \$100,000
- 7 G. \$100,001 - \$250,000
- 8 H. More than \$250,000

Lead In: P5-019[-2:-1]
Default Next Question: P5-021

[P5-021]

(%parent.marstat%=1) OR (%parent.partnerinhh%=1) OR (%parent.spouseinhh%=1);

/* is resp married or living with partner */

Branch Conditions...

1 : Go To P5-022

Lead In: P5-018[Default] P5-019[Default] P5-020[Default]
Default Next Question: P5-045

[P5-022]

Now I would like to ask about the earnings and business income of your %p5i_sp/par%. During 1996, did your %p5i_sp/par% receive any income from a job such as wages, salary, commissions, or tips?

Please include any income your %p5i_sp/par% received from service in the military, the military reserves or the National Guard.

- 1 YES
- 0 NO (Go To P5-031)

Refusal(-1) (Go To P5-031)
DONT KNOW(-2) (Go To P5-031)

Lead In: P5-021[1:1]
Default Next Question: P5-028

[P5-023]

Please remember that the information you provide to us about yourself and your %p5i_sp/par% is kept strictly confidential. Did your %p5i_sp/par% have any income from any jobs during 1996?

- 1 YES (Go To P5-028)
- 0 NO

Lead In: P5-022[-1:-1]
Default Next Question: P5-031

[P5-028]

During 1996, how much income did your %p5i_sp/par% receive from wages, salary, commissions, or tips from all jobs, before deductions for taxes or anything else?

%p5i_spmiltext% %p5i_spmiltext2%

Refusal(-1) (Go To P5-029)
DONT KNOW(-2) (Go To P5-029)

Lead In: P5-022[Default] P5-023[Default]
Default Next Question: P5-031

[P5-029]

(HAND CARD D)

Please look at this card. Can you tell me the letter of the category that corresponds to the range that includes the amount your %p5i_sp/par% received last year in wages, salary, commissions and tips?

- 1 A. \$1 - \$5,000
- 2 B. \$5,001 - \$10,000
- 3 C. \$10,001 - \$25,000
- 4 D. \$25,001 - \$50,000
- 5 E. \$50,001 - \$100,000
- 6 F. \$100,001 - \$250,000
- 7 G. More than \$250,000

Lead In: P5-028[-2:-1]
Default Next Question: P5-031

[P5-031]

(Excluding any income you already have mentioned) During 1996, did your %P5i_sp/par% receive any money in income from %P5i_his/her% own farm, business, partnership, or professional practice?

- 1 YES (Go To P5-032)
- 0 NO

Lead In: P5-022[Default] P5-023[Default] P5-028[Default] P5-029[Default]
Default Next Question: P5-045

[P5-032]

During 1996, how much did your %p5i_sp/par% receive from %p5i_his/her% own farm, business, partnership or professional practice AFTER EXPENSES?

(IF %p5i_sp/par% LOST MONEY ON OWN FARM , BUSINESS, PARTNERSHIP OR PROFESSIONAL PRACTICE AFTER EXPENSES ENTER NEGATIVE VALUE.)

Refusal(-1) (Go To P5-033)
DONT KNOW(-2) (Go To P5-033)

Lead In: P5-031[1:1]
Default Next Question: P5-045

[P5-033]

(HAND CARD E)

Please look at this card. Can you tell me the letter of the category that corresponds to the range that includes the amount your %p5i_sp/par% received last year from %p5i_his/her% own farm, business, partnership or professional practice after expenses?

- 1 A. LOST/WOULD LOSE MONEY
- 2 B. \$1 - \$5,000
- 3 C. \$5,001 - \$10,000
- 4 D. \$10,001 - \$25,000
- 5 E. \$25,001 - \$50,000
- 6 F. \$50,001 - \$100,000
- 7 G. \$100,001 - \$250,000
- 8 H. More than \$250,000

Lead In: P5-032[-2:-1]

Default Next Question: P5-045

[P5-045]

Now I would like to ask about other sources of income %p5i_msfill1% may have received last year in 1996. During 1996, did %p5i_msfill1% receive any interest payments from interest-earning-checking accounts, savings accounts, money market accounts, bonds, treasury notes, IRA accounts, or certificates of deposit or dividend payments from stock or mutual funds?

- 1 YES
- 0 NO (Go To P5-048)

Refusal(-1) (Go To P5-048)

DONT KNOW(-2) (Go To P5-048)

Lead In: P5-021[Default] P5-031[Default] P5-032[Default] P5-033[Default]

Default Next Question: P5-046

[P5-046]

What was the total amount of interest and dividend payments %p5i_msfill1% received during 1996, including even small amounts and amounts reinvested or credited to the accounts?

Refusal(-1) (Go To P5-047)

DONT KNOW(-2) (Go To P5-047)

Lead In: P5-045[Default]

Default Next Question: P5-048

[P5-047]

(HAND CARD F)

Please look at this card. Can you tell me the letter of the category that corresponds to the range that includes the amount of income %p5i_msfill2% received last year in interest and dividend payments?

- 1 A. \$1 - \$1,000
- 2 B. \$1,001 - \$2,500
- 3 C. \$2,501 - \$5,000
- 4 D. \$5,001 - \$10,000
- 5 E. \$10,001 - \$25,000
- 6 F. \$25,001 - \$50,000
- 7 G. More than \$50,000

Lead In: P5-046[-2:-1]
Default Next Question: P5-048

[P5-048]

During 1996, did %p5i_msfill1% receive any income from Aid to Families with Dependent Children (AFDC) or Aid to Dependent Children (ADC)?

- 1 YES (Go To P5-049)
- 0 NO

Lead In: P5-046[Default] P5-047[Default] P5-045[-2:0]
Default Next Question: P5-052

[P5-049]

What was the total amount of income %p5i_msfill2% received from AFDC or ADC last year?

- Refusal(-1) (Go To P5-050)
- DONT KNOW(-2) (Go To P5-050)

Lead In: P5-048[1:1]
Default Next Question: P5-052

[P5-050]

(HAND CARD G)

Please look at this card. Can you tell me the letter of the category that corresponds to the range that includes the amount of income %p5i_msfill2% received last year in AFDC or ADC payments?

- 1 A. \$1 - \$500
- 2 B. \$501 - \$1,000
- 3 C. \$1,001 - \$2,500
- 4 D. \$2,501 - \$5,000
- 5 E. \$5,001 - \$7,500
- 6 F. \$7,501 - \$10,000
- 7 G. More than \$10,000

Lead In: P5-049[-2:-1]
Default Next Question: P5-052

[P5-052]

During 1996, did %p5i_msfill1% receive any food stamp benefits?

- 1 YES (Go To P5-053)
- 0 NO

Lead In: P5-048[Default] P5-049[Default] P5-050[Default]
Default Next Question: P5-055

[P5-053]

What was the total value of the food stamps %p5i_msfill2% received during 1996?

- Refusal(-1) (Go To P5-054)
- DONT KNOW(-2) (Go To P5-054)

Lead In: P5-052[1:1]
Default Next Question: P5-055

[P5-054]

(HAND CARD G)

Please look at this card. Can you tell me the letter of the category that corresponds to the range that includes the total value of the food stamps %p5i_msfill2% received last year?

- 1 A. \$1 - \$500
- 2 B. \$501 - \$1,000
- 3 C. \$1,001 - \$2,500
- 4 D. \$2,501 - \$5,000
- 5 E. \$5,001 - \$7,500
- 6 F. \$7,501 - \$10,000
- 7 G. More than \$10,000

Lead In: P5-053[-2:-1]
Default Next Question: P5-055

[P5-055]

During 1996, did %p5i_msfill1% receive any income or benefits from Supplemental Security Income (SSI) program?

- 1 YES (Go To P5-056)
- 0 NO

Lead In: P5-052[Default] P5-053[Default] P5-054[Default]
Default Next Question: P5-063

[P5-056]

What was the total amount %p5i_msfill2% received from SSI?

Refusal(-1) (Go To P5-057)

DONT KNOW(-2) (Go To P5-057)

Lead In: P5-055[1:1]

Default Next Question: P5-063

[P5-057]

(HAND CARD G)

Please look at this card. Can you tell me the letter of the category that corresponds to the range that includes the total amount of benefits %p5i_msfill2% received from these other welfare programs last year?

- 1 A. \$1 - \$500
- 2 B. \$501 - \$1,000
- 3 C. \$1,001 - \$2,500
- 4 D. \$2,501 - \$5,000
- 5 E. \$5,001 - \$7,500
- 6 F. \$7,501 - \$10,000
- 7 G. More than \$10,000

Lead In: P5-056[-2:-1]

Default Next Question: P5-063

[P5-063]

Have child support payments ever been agreed to or awarded for any of %p5i_childfill% living here?

- 1 YES (Go To P5-064)
- 0 NO

Lead In: P5-057[Default] P5-055[Default] P5-056[Default]

Default Next Question: P5-067

[P5-064]

During 1996, were %p5i_msfill1% supposed to receive any child-support payments?

- 1 YES (Go To P5-065)
- 0 NO

Lead In: P5-063[1:1]

Default Next Question: P5-067

[P5-065]

How much did %p5i_msfill1% receive in child-support during 1996?

Refusal(-1) (Go To P5-066)

DONT KNOW(-2) (Go To P5-066)

Lead In: P5-064[1:1]

Default Next Question: P5-067

[P5-066]

(HAND CARD F)

Please look at this card. Can you tell me the letter of the category that corresponds to the range that includes the amount of income %p5i_msfill2% received last year in child support payments?

- 1 A. \$1 - \$1,000
- 2 B. \$1,001 - \$2,500
- 3 C. \$2,501 - \$5,000
- 4 D. \$5,001 - \$10,000
- 5 E. \$10,001 - \$25,000
- 6 F. \$25,001 - \$50,000
- 7 G. More than \$50,000

Lead In: P5-065[-2:-1]

Default Next Question: P5-067

[P5-067]

During 1996, did %p5i_msfill1% receive income from any other sources, such as unemployment or workers' compensation benefits, rental income, other welfare benefits, Social Security payments, pension or retirement income, alimony, veterans or GI benefits, inheritances, payments from life insurance policies or any other regular periodic source of income?

- 1 YES (Go To P5-068)
- 0 NO

Lead In: P5-063[Default] P5-064[Default] P5-065[Default] P5-066[Default]

Default Next Question: P5-071

[P5-068]

What was the total amount %p5i_msfill2% received from all other sources (e.g., friends, relatives, royalties or any other regular or periodic source of income) during 1996?

Refusal(-1) (Go To P5-069)

DONT KNOW(-2) (Go To P5-069)

Lead In: P5-067[1:1]

Default Next Question: P5-071

[P5-069]

(HAND CARD F)

Please look at this card. Can you tell me the letter of the category that corresponds to the range that includes the total amount %p5i_msfill2% received from all other sources of income?

- 1 A. \$1 - \$1,000
- 2 B. \$1,001 - \$2,500
- 3 C. \$2,501 - \$5,000
- 4 D. \$5,001 - \$10,000
- 5 E. \$10,001 - \$25,000
- 6 F. \$25,001 - \$50,000
- 7 G. More than \$50,000

Lead In: P5-068[-2:-1]
Default Next Question: P5-071

[P5-071]

XFER (ROS=HHI, DIR=OUT, FIELDS=(NAME=%HHI.NAME%, DOLEL=%HHI.DOLEL%,
AGE=%HHI
.AGE%));

/* transfer fields out to save arrays to be used from roster */

Branch Conditions...
1 to 999 : Go To P5-072-LOOP-BEGIN

Lead In: P5-067[Default] P5-068[Default] P5-069[Default]
Default Next Question: P5-081

[P5-072-LOOP-BEGIN]

REPEAT (%P5I_HHILOOP%);

Lead In: P5-071[Default]
Default Next Question: P5-073

[P5-073]

(%hhi.age()% < 14);

/* check if person is less than 14 if so go to next loop */

Branch Conditions...
1 : Go To P5-079-LOOP-END

Lead In: P5-072-LOOP-BEGIN[Default]
Default Next Question: P5-074

[P5-074]

((%hhi.dolel()% = 1) OR (%parent.spouseid% = %p5i_hhiloop%) OR (%parent
.partnerid% = %p5i_hhiloop%) OR (%parent.id% = %p5i_hhiloop%));

/* check if person is sample member or is spouse or partner */

Branch Conditions...

1 : Go To P5-079-LOOP-END

Lead In: P5-073[Default]

Default Next Question: P5-075

[P5-075]

(%P5-076%=1);

/* check if p5-076 was already asked */

Branch Conditions...

1 : Go To P5-077

Lead In: P5-074[Default]

Default Next Question: P5-076

[P5-076]

The next few questions are about the income received during 1996 by the other persons over the age of 14 who live in your household.

Lead In: P5-075[Default]

Default Next Question: P5-077

[P5-077]

During 1996, how much money did %hhi.name()% earn working for someone else or from being self-employed?

Lead In: P5-076[Default] P5-075[1:1]

Default Next Question: P5-078

[P5-078]

About how much in total did %hhi.name()% receive in 1996 from any other sources such as Social Security, pensions, welfare, interest, gifts, or anything else?

Lead In: P5-077[Default]

Default Next Question: P5-079-LOOP-END

[P5-079-LOOP-END]

UNTIL (%P5i_hhiloop%,%P5i_hhiloop% = %p5i_hhicnt%);

Lead In: P5-078[Default] P5-073[1:1] P5-074[1:1]

Default Next Question: P5-081

[P5-081]

Now we have some questions about your household savings. As with all of the questions in this survey, we want to reassure you that the information you

provide to us is kept strictly confidential.

Lead In: P5-071[Default] P5-079-LOOP-END[Default]
Default Next Question: P5-082

[P5-082]

(%key.dwelling% = 13);

/* R lives on ranch or farm */

Branch Conditions...

1 : Go To P5-084

Lead In: P5-081[Default]
Default Next Question: P5-083

[P5-083]

(%key.dwelling%=8) or (%key.dwelling%=9);

/* R lives in mobile home */

Branch Conditions...

1 : Go To P5-093

Lead In: P5-082[Default]
Default Next Question: P5-101

[P5-084]

Do %p5i_msfll2% own this (ranch/farm), do you own PART of it, do you rent it,
is it owned by a business, or what?

- 1 OWNS ALL (Go To P5-086)
- 2 OWNS PART (Go To P5-088)
- 3 RENTS (Go To P5-120)
- 4 OWNED BY A BUSINESS (Go To P5-120)
- 7 OTHER

Refusal(-1) (Go To P5-120)
DONT KNOW(-2) (Go To P5-120)

Lead In: P5-082[1:1]
Default Next Question: P5-085

[P5-085]

What is your situation?

- 1 1. HOUSING IS PART OF JOB COMPENSATION; E.G., SERVANT,
1 HOUSEKEEPER, FARM LABORER
- 2 2. HOUSING IS PAID FOR BY HU RESIDENT OTHER
2 THAN R OR SPOUSE/PARTNER

- 3 3. HOUSING IS PAID FOR BY FRIEND/ RELATIVE OUTSIDE OF HU
- 4 4. HOUSING IS PAID FOR BY GOVERNMENT AGENCY/
4 WELFARE/CHARITABLE ORGANIZATION
- 5 5. SOLD, BUT R HAS NOT YET MOVED OUT
- 6 6. LIVING IN HOUSE WHICH R OR SPOUSE/PARTNER
6 WILL INHERIT; ESTATE IN PROGRESS
- 7 7. TEMPORARY LIVING ARRANGEMENT WHILE HOUSE
7 UNDER REPAIR/CONSTRUCTION
- 8 8. OTHER

Lead In: P5-084[Default]
Default Next Question: P5-120

[P5-086]

What is the present value of this (farm/ranch), including this house and the immediately surrounding land? I mean, about what would it bring if it were sold today?

Refusal(-1) (Go To P5-087)
DONT KNOW(-2) (Go To P5-087)

Lead In: P5-084[1:1]
Default Next Question: P5-114

[P5-087]

(HAND CARD H)

Please look at this card. Can you tell me the letter of the category that is your best estimate of that amount?

- 1 A. \$1 - \$25,000
- 2 B. \$25,001 - \$50,000
- 3 C. \$50,001 - \$100,000
- 4 D. \$100,001 - \$250,000
- 5 E. \$250,001 - \$500,000
- 6 F. \$500,001 - \$1,000,000
- 7 G. More than \$1,000,000

Lead In: P5-086[-2:-1]
Default Next Question: P5-114

[P5-088]

Now I'd like to ask you about part of the property that %p5i_msfill2% PERSONALLY own. About what percent of the total property is that?

Branch Conditions...
0 : Go To P5-120
-2 to -1 : Go To P5-091

Refusal(-1) (Go To P5-091)
DONT KNOW(-2) (Go To P5-091)

Lead In: P5-084[2:2]
Default Next Question: P5-089

[P5-089]

What is the present value of this farm/ranch including this house and the immediately surrounding land? I mean, about what would it bring if it were sold today?

Refusal(-1) (Go To P5-090)
DONT KNOW(-2) (Go To P5-090)

Lead In: P5-088[Default]
Default Next Question: P5-114

[P5-090]

(HAND CARD H)

Please look at this card. Can you tell me the letter of the category that is your best estimate of that amount?

- 1 A. \$1 - \$25,000
- 2 B. \$25,001 - \$50,000
- 3 C. \$50,001 - \$100,000
- 4 D. \$100,001 - \$250,000
- 5 E. \$250,001 - \$500,000
- 6 F. \$500,001 - \$1,000,000
- 7 G. More than \$1,000,000

Lead In: P5-089[-2:-1]
Default Next Question: P5-114

[P5-091]

What is the present value of the parts of this farm/ranch including this house and the immediately surrounding land that %p5i_msfill1% own? I mean, about what would it bring if you sold your portion today?

Refusal(-1) (Go To P5-092)
DONT KNOW(-2) (Go To P5-092)

Lead In: P5-088[-2:-1]
Default Next Question: P5-114

[P5-092]

(HAND CARD H)

Please look at this card. Can you tell me the letter of the category that is your best estimate of that amount?

- 1 A. \$1 - \$25,000

- 2 B. \$25,001 - \$50,000
- 3 C. \$50,001 - \$100,000
- 4 D. \$100,001 - \$250,000
- 5 E. \$250,001 - \$500,000
- 6 F. \$500,001 - \$1,000,000
- 7 G. More than \$1,000,000

Lead In: P5-091[-2:-1]
 Default Next Question: P5-114

[P5-093]

Do %p5i_msfill1% own this mobile home and the site or lot, do you own only the mobile home, do you own only the site, do you rent both the mobile home and the site, or what?

- 1 OWN BOTH HOME AND SITE (Go To P5-095)
- 2 OWN ONLY HOME (Go To P5-097)
- 3 OWN ONLY SITE (Go To P5-099)
- 4 RENT BOTH (Go To P5-120)
- 7 NEITHER OWNS NOR RENTS

Refusal(-1) (Go To P5-120)
 DONT KNOW(-2) (Go To P5-120)

Lead In: P5-083[1:1]
 Default Next Question: P5-094

[P5-094]

What is your situation?

- 1 1. HOUSING IS PART OF JOB COMPENSATION; (E.G ., SERVANT,
 1 HOUSEKEEPER, GARDENER)
- 2 2. HOUSING IS PAID FOR BY HU RESIDENT OTHER
 2 THAN R OR SPOUSE/PARTNER
- 3 3 HOUSING IS PAID FOR BY A FRIEND/RELATIVE OUTSIDE OF HU
- 4 4. HOUSING PAID FOR BY A GOVERNMENT AGENCY/
 4 WELFARE/CHARITABLE INSTITUTION
- 5 5. SOLD, BUT R HAS NOT YET MOVED OUT
- 6 6. LIVING IN HOUSE WHICH R OR SPOUSE /PARTNER WILL INHERIT
 6 ESTATE IN PROGRESS
- 7 7. TEMPORARY LIVING ARRANGEMENT WHILE HOUSE
 7 UNDER REPAIR/ CONSTRUCTION
- 8 8 OTHER

Lead In: P5-093[Default]
 Default Next Question: P5-120

[P5-095]

What is the present value of your mobile home and site? That is, about how much would they bring if they were sold today?

Refusal(-1) (Go To P5-096)
DONT KNOW(-2) (Go To P5-096)

Lead In: P5-093[1:1]
Default Next Question: P5-114

[P5-096]

(HAND CARD H)

Please look at this card. Can you tell me the letter of the category that is your best estimate of that amount?

- 1 A. \$1 - \$25,000
- 2 B. \$25,001 - \$50,000
- 3 C. \$50,001 - \$100,000
- 4 D. \$100,001 - \$250,000
- 5 E. \$250,001 - \$500,000
- 6 F. \$500,001 - \$1,000,000
- 7 G. More than \$1,000,000

Lead In: P5-095[-2:-1]
Default Next Question: P5-114

[P5-097]

What is the present value of your mobile home? That is about how much would it bring if it were sold today?

Refusal(-1) (Go To P5-098)
DONT KNOW(-2) (Go To P5-098)

Lead In: P5-093[2:2]
Default Next Question: P5-114

[P5-098]

(HAND CARD D)

Please look at this card. Can you tell me the letter of the category that is your best estimate of that amount?

- 1 A. \$1 - \$5,000
- 2 B. \$5,001 - \$10,000
- 3 C. \$10,001 - \$25,000
- 4 D. \$25,001 - \$50,000
- 5 E. \$50,001 - \$100,000
- 6 F. \$100,001 - \$250,000
- 7 G. More than \$250,000

Lead In: P5-097[-2:-1]
Default Next Question: P5-114

[P5-099]

What is the present value of your mobile home site? That is, about how much would it bring if it were sold today?

Refusal(-1) (Go To P5-100)
DONT KNOW(-2) (Go To P5-100)

Lead In: P5-093[3:3]
Default Next Question: P5-114

[P5-100]

(HAND CARD D)

Please look at this card. Can you tell me the letter of the category that is your best estimate of that amount?

- 1 A. \$1 - \$5,000
- 2 B. \$5,001 - \$10,000
- 3 C. \$10,001 - \$25,000
- 4 D. \$25,001 - \$50,000
- 5 E. \$50,001 - \$100,000
- 6 F. \$100,001 - \$250,000
- 7 G. More than \$250,000

Lead In: P5-099[-2:-1]
Default Next Question: P5-114

[P5-101]

Do %p5i_msfill1% own this (house/apartment), or do you rent or what?

- 1 OWNS OR IS BUYING; LAND CONTRACT (Go To P5-103)
- 2 PAYS RENT (Go To P5-120)
- 3 NEITHER OWNS NOR RENTS

Refusal(-1) (Go To P5-120)
DONT KNOW(-2) (Go To P5-120)

Lead In: P5-083[Default]
Default Next Question: P5-102

[P5-102]

What is your situation?

- 1 1. HOUSING IS PART OF JOB COMPENSATION; (E.G ., SERVANT,
1 HOUSEKEEPER, GARDENER)
- 2 2. HOUSING IS PAID FOR BY HU RESIDENT OTHER
2 THAN R OR SPOUSE/PARTNER
- 3 3 HOUSING IS PAID FOR BY A FRIEND/RELATIVE OUTSIDE OF HU
- 4 4. HOUSING PAID FOR BY A GOVERNMENT AGENCY/
4 WELFARE/CHARITABLE INSTITUTION
- 5 5. SOLD, BUT R HAS NOT YET MOVED OUT

- 6 6. LIVING IN HOUSE WHICH R OR SPOUSE /PARTNER WILL INHERIT
- 6 ESTATE IN PROGRESS
- 7 7. TEMPORARY LIVING ARRANGEMENT WHILE HOUSE
- 7 UNDER REPAIR/ CONSTRUCTION
- 8 OTHER

Lead In: P5-101[Default]
Default Next Question: P5-120

[P5-103]

((%key.dwelling% >=2) and (%key.dwelling% <=6)) or (%key.dwelling% = 11);

/* R lives in multi-unit structure */

Branch Conditions...

1 : Go To P5-104

Lead In: P5-101[1:1]
Default Next Question: P5-112

[P5-104]

Do %p5i_msfill1% own this unit as part of a condominium, co-op or townhouse association?

- 1 YES
- 0 NO

Lead In: P5-103[1:1]
Default Next Question: P5-105

[P5-105]

Do %p5i_msfill1% own your entire building, or just your unit?

- 1 ENTIRE BUILDING
- 2 JUST UNIT

Lead In: P5-104[Default]
Default Next Question: P5-112

[P5-112]

What is the present value of %p5i_housing%? That is, about how much would it bring if it were sold today?

Refusal(-1) (Go To P5-113)
DONT KNOW(-2) (Go To P5-113)

Lead In: P5-103[Default] P5-105[Default]
Default Next Question: P5-114

[P5-113]

(HAND CARD H)

Please look at this card. Can you tell me the letter of the category that is your best estimate of that amount?

- 1 A. \$1 - \$25,000
- 2 B. \$25,001 - \$50,000
- 3 C. \$50,001 - \$100,000
- 4 D. \$100,001 - \$250,000
- 5 E. \$250,001 - \$500,000
- 6 F. \$500,001 - \$1,000,000
- 7 G. More than \$1,000,000

Lead In: P5-112[-2:-1]
Default Next Question: P5-114

[P5-114]

Is there a mortgage or land contract on this (INTERVIEWER: READ THE APPROPRIATE CATEGORY) (home and land/apartment/property)?
(IF R ASKS, DO NOT INCLUDE HOME EQUITY LOANS, LINES OF CREDIT OR OTHER HOME-SECURED LOANS.)

- 1 YES, MORTGAGE
- 2 YES, LAND CONTRACT
- 0 NO (Go To P5-117)

Refusal(-1) (Go To P5-117)
DONT KNOW(-2) (Go To P5-117)

Lead In: P5-086[Default] P5-087[Default] P5-089[Default] P5-090[Default]
P5-091[Default] P5-092[Default] P5-095[Default] P5-096[Default]
P5-097[Default] P5-098[Default] P5-099[Default] P5-100[Default]
P5-112[Default] P5-113[Default]
Default Next Question: P5-115

[P5-115]

How much is still owed on this mortgage or land contract?

Refusal(-1) (Go To P5-116)
DONT KNOW(-2) (Go To P5-116)

Lead In: P5-114[Default]
Default Next Question: P5-117

[P5-116]

(HAND CARD H)

Please look at this card. Can you tell me the letter of the category that is your best estimate of that amount?

- 1 A. \$1 - \$25,000
- 2 B. \$25,001 - \$50,000
- 3 C. \$50,001 - \$100,000
- 4 D. \$100,001 - \$250,000
- 5 E. \$250,001 - \$500,000
- 6 F. \$500,001 - \$1,000,000
- 7 G. More than \$1,000,000

Lead In: P5-115[-2:-1]
Default Next Question: P5-117

[P5-117]

Do %p5i_msfill1% have any other types of loans that use this property as collateral, including second mortgages, home equity loans, or any outstanding loans against a home equity line of credit?

- 1 YES (Go To P5-118)
- 0 NO

Lead In: P5-115[Default] P5-116[Default] P5-114[-2:-1] P5-114[0:0]
Default Next Question: P5-120

[P5-118]

How much is still owed on (this/these) loan(s)?

- Refusal(-1) (Go To P5-119)
- DONT KNOW(-2) (Go To P5-119)

Lead In: P5-117[1:1]
Default Next Question: P5-120

[P5-119]

(HAND CARD D)

Please look at this card. Can you tell me the letter of the category that is your best estimate of that amount?

- 1 A. \$1 - \$5,000
- 2 B. \$5,001 - \$10,000
- 3 C. \$10,001 - \$25,000
- 4 D. \$25,001 - \$50,000
- 5 E. \$50,001 - \$100,000
- 6 F. \$100,001 - \$250,000
- 7 G. More than \$250,000

Lead In: P5-118[-2:-1]
Default Next Question: P5-120

[P5-120]

Do %p5i_msfill1% own a business partnership or professional practice, or any

part of a business/partnership/professional practice?

1 YES (Go To P5-121)

0 NO

Lead In: P5-085[Default] P5-094[Default] P5-102[Default] P5-117[Default]

P5-118[Default] P5-119[Default] P5-084[-2:-1] P5-093[-2:-1]

P5-101[-2:-1] P5-084[3:4] P5-088[0:0] P5-093[4:4] P5-101[2:2]

Default Next Question: P5-124

[P5-121]

If you sold all of the business/partnership/professional practice that %p5i_msfill2% own, including any real estate owned by business/partnership/professional practice, and paid off any debts, how much would you get?

(IF RESPONDENT WOULD LOSE MONEY ON OWN BUSINESS PARTNERSHIP OR PROFESSIONAL PRACTICE AFTER SALE ENTER NEGATIVE VALUE)

Refusal(-1) (Go To P5-122)

DONT KNOW(-2) (Go To P5-122)

Lead In: P5-120[1:1]

Default Next Question: P5-124

[P5-122]

(HAND CARD H)

Please look at this card. Can you tell me the letter of the category that is your best estimate of that amount?

- 1 A. \$1 - \$25,000
- 2 B. \$25,001 - \$50,000
- 3 C. \$50,001 - \$100,000
- 4 D. \$100,001 - \$250,000
- 5 E. \$250,001 - \$500,000
- 6 F. \$500,001 - \$1,000,000
- 7 G. More than \$1,000,000

Lead In: P5-121[-2:-1]

Default Next Question: P5-124

[P5-124]

Do %p5i_msfill1% have any other real estate, such as a second home, vacation homes or condominiums (including any weeks in a time share unit), land, rental real estate, a partnership, or money owed to you on a land contract or mortgage?

1 YES (Go To P5-125)

0 NO

Lead In: P5-120[Default] P5-121[Default] P5-122[Default]
Default Next Question: P5-127

[P5-125]

If you sold all of that real estate and paid off any debts on it, how much would you get?

(IF RESPONDENT WOULD LOSE MONEY ON OWN BUSINESS PARTNERSHIP OR PROFESSIONAL PRACTICE AFTER SALE ENTER NEGATIVE VALUE)

Refusal(-1) (Go To P5-126)
DONT KNOW(-2) (Go To P5-126)

Lead In: P5-124[1:1]
Default Next Question: P5-127

[P5-126]

(HAND CARD H)

Please look at this card. Can you tell me the letter of the category that is your best estimate of that amount?

- 1 A. \$1 - \$25,000
- 2 B. \$25,001 - \$50,000
- 3 C. \$50,001 - \$100,000
- 4 D. \$100,001 - \$250,000
- 5 E. \$250,001 - \$500,000
- 6 F. \$500,001 - \$1,000,000
- 7 G. More than \$1,000,000

Lead In: P5-125[-2:-1]
Default Next Question: P5-127

[P5-127]

Do %p5i_msfill1% have any educational IRA accounts or other pre-paid tuition savings accounts established to help pay college costs for any of %p5i_msfill3% children?

- 1 YES
- 0 NO (Go To P5-130)

Refusal(-1) (Go To P5-130)
DONT KNOW(-2) (Go To P5-130)

Lead In: P5-124[Default] P5-125[Default] P5-126[Default]
Default Next Question: P5-128

[P5-128]

What is the total dollar value of these accounts?

Refusal(-1) (Go To P5-129)

DONT KNOW(-2) (Go To P5-129)

Lead In: P5-127[Default]

Default Next Question: P5-130

[P5-129]

(HAND CARD D)

Please look at this card. Can you tell me the letter of the category that is your best estimate of the total dollar value of these accounts?

- 1 A. \$1 - \$5,000
- 2 B. \$5,001 - \$10,000
- 3 C. \$10,001 - \$25,000
- 4 D. \$25,001 - \$50,000
- 5 E. \$50,001 - \$100,000
- 6 F. \$100,001 - \$250,000
- 7 G. More than \$250,000

Lead In: P5-128[-2:-1]

Default Next Question: P5-130

[P5-130]

Now I would like to ask you some questions about any pension or retirement savings. Many employers and unions have pension or retirement plans, and some provide tax-deferred plans such as thrift/savings, 401K's, profit sharing or stock ownership plans. Additionally, individuals can provide for their own retirement with IRA or Keogh plans. Do %p5i_mfill1% have any savings in any of these types of plans?

- 1 YES (Go To P5-131)
- 0 NO

Lead In: P5-128[Default] P5-129[Default] P5-127[-2:0]

Default Next Question: P5-133

[P5-131]

What is the total value of all the savings in these types of plans?

Refusal(-1) (Go To P5-132)

DONT KNOW(-2) (Go To P5-132)

Lead In: P5-130[1:1]

Default Next Question: P5-133

[P5-132]

(HAND CARD D)

Please look at this card. Can you tell me the letter of the category that is your best estimate of that amount?

- 1 A. \$1 - \$5,000
- 2 B. \$5,001 - \$10,000
- 3 C. \$10,001 - \$25,000
- 4 D. \$25,001 - \$50,000
- 5 E. \$50,001 - \$100,000
- 6 F. \$100,001 - \$250,000
- 7 G. More than \$250,000

Lead In: P5-131[-2:-1]
Default Next Question: P5-133

[P5-133]

Excluding retirement plan savings, do %p5i_msfill1% have any checking accounts, savings accounts or money market accounts or funds, including any such accounts held in investment trusts?

(IF RESPONDENT NEEDS CLARIFICATION: THESE COULD INCLUDE ACCOUNTS AT BANKS, SAVINGS AND LOAN ASSOCIATIONS, PASSBOOK ACCOUNTS, SHARE ACCOUNTS, CHRISTMAS CLUB ACCOUNTS, OR ANY OTHER TYPE OF CHECKING OR SAVINGS ACCOUNT OR MONEY MARKET FUNDS.)

- 1 YES (Go To P5-134)
- 0 NO

Lead In: P5-130[Default] P5-131[Default] P5-132[Default]
Default Next Question: P5-136

[P5-134]

If you added up all such accounts, what is the (total) current balance (in this account/in these accounts)?

(Average balance over the past month?)

- Refusal(-1) (Go To P5-135)
- DONT KNOW(-2) (Go To P5-135)

Lead In: P5-133[1:1]
Default Next Question: P5-136

[P5-135]

(HAND CARD D)

Please look at this card. Can you tell me the letter of the category that is your best estimate of that amount?

- 1 A. \$1 - \$5,000
- 2 B. \$5,001 - \$10,000
- 3 C. \$10,001 - \$25,000
- 4 D. \$25,001 - \$50,000
- 5 E. \$50,001 - \$100,000
- 6 F. \$100,001 - \$250,000
- 7 G. More than \$250,000

Lead In: P5-134[-2:-1]
 Default Next Question: P5-136

[P5-136]

Excluding retirement plan savings, do %p5i_msfill1% have any certificates of deposits (CD's) at financial institutions, government savings bonds, Treasury bills, or other corporate, municipal, government or other types of bonds or bills, including any CD's, bonds or bills held in investment trusts?

(IF RESPONDENT ASKS, CD'S ARE CERTIFICATES HELD FOR A SET PERIOD OF TIME THAT MUST BE CASHED OR RENEWED AT THE MATURITY DATE, GOVERNMENT SAVINGS BONDS MAY BE CALLED SERIES EE OR HH AND CAN BE PURCHASED BY PAYROLL DEDUCTION. IF NECESSARY, PROBE WITH EXAMPLES -- MORTGAGE BACKED BONDS SUCH AS THOSE FROM "GINNE-MAE" OR "FANNIE-MAE"; U.S. GOVERNMENT BONDS OR TREASURY BILLS; STATE OR MUNICIPAL BONDS; TAX FREE BONDS; FOREIGN BONDS; CORPORATE BONDS.)

- 1 YES (Go To P5-137)
- 0 NO

Lead In: P5-133[Default] P5-134[Default] P5-135[Default]
 Default Next Question: P5-139

[P5-137]

If you were to cash in all of these CD(s), bonds and bills how much would you get?

- Refusal(-1) (Go To P5-138)
- DONT KNOW(-2) (Go To P5-138)

Lead In: P5-136[1:1]
 Default Next Question: P5-139

[P5-138]

(HAND CARD D)

Please look at this card. Can you tell me the letter of the category that is your best estimate of that amount?

- 1 A. \$1 - \$5,000
- 2 B. \$5,001 - \$10,000

- 3 C. \$10,001 - \$25,000
- 4 D. \$25,001 - \$50,000
- 5 E. \$50,001 - \$100,000
- 6 F. \$100,001 \$250,000
- 7 G. More than \$250,000

Lead In: P5-137[-2:-1]
Default Next Question: P5-139

[P5-139]

Do %p5i_msfill1% have any shares in publically held corporations or mutual funds, including any stocks or mutual funds held in investment trusts?

- 1 YES (Go To P5-140)
- 0 NO

Lead In: P5-136[Default] P5-137[Default] P5-138[Default]
Default Next Question: P5-142

[P5-140]

If you sold all of the shares of stock in publically held corporations, including mutual funds, how much would you get?

- Refusal(-1) (Go To P5-141)
- DONT KNOW(-2) (Go To P5-141)

Lead In: P5-139[1:1]
Default Next Question: P5-142

[P5-141]

(HAND CARD D)

Please look at this card. Can you tell me the letter of the category that is your best estimate of that amount?

- 1 A. \$1 - \$5,000
- 2 B. \$5,001 - \$10,000
- 3 C. \$10,001 - \$25,000
- 4 D. \$25,001 - \$50,000
- 5 E. \$50,001 - \$100,000
- 6 F. \$100,001 \$250,000
- 7 G. More than \$250,000

Lead In: P5-140[-2:-1]
Default Next Question: P5-142

[P5-142]

Do %p5i_msfill1% own any vehicles such as a car, van, trucks, or jeep-like vehicles, a motor home/RV, motorcycle, or a boat or airplane?

1 YES (Go To P5-143)
0 NO

Lead In: P5-139[Default] P5-140[Default] P5-141[Default]
Default Next Question: P5-147

[P5-143]

Altogether, what is the current market value of all of these vehicles?

Refusal(-1) (Go To P5-144)
DONT KNOW(-2) (Go To P5-144)

Lead In: P5-142[1:1]
Default Next Question: P5-145

[P5-144]

(HAND CARD F)

Please look at this card. Can you tell me the letter of the category that is your best estimate of the total market value of all of these vehicles?

- 1 A. \$1 - \$1,000
- 2 B. \$1,001 - \$2,500
- 3 C. \$2,501 - \$5,000
- 4 D. \$5,001 - \$10,000
- 5 E. \$10,001 - \$25,000
- 6 F. \$25,001 - \$50,000
- 7 G. More than \$50,000

Lead In: P5-143[-2:-1]
Default Next Question: P5-145

[P5-145]

How much is still owed on all of these vehicles?

Refusal(-1) (Go To P5-146)
DONT KNOW(-2) (Go To P5-146)

Lead In: P5-143[Default] P5-144[Default]
Default Next Question: P5-147

[P5-146]

(HAND CARD F)

Please look at this card. Can you tell me the letter of the category that is your best estimate of the amount still owed on all of these vehicles?

- 1 A. \$1 - \$1,000
- 2 B. \$1,001 - \$2,500
- 3 C. \$2,501 - \$5,000

- 4 D. \$5,001 - \$10,000
- 5 E. \$10,001 - \$25,000
- 6 F. \$25,001 - \$50,000
- 7 G. More than \$50,000

Lead In: P5-145[-2:-1]
 Default Next Question: P5-147

[P5-147]

(HAND CARD F)

Now we would like to get your best estimate of the value of your household furnishings including furniture, major appliances, and home electronic items. Please look at this card and tell me the letter of your best estimate of the amount of money you would get if you were to sell all of your household furnishings?

- 1 A. \$1 - \$1,000
- 2 B. \$1,001 - \$2,500
- 3 C. \$2,501 - \$5,000
- 4 D. \$5,001 - \$10,000
- 5 E. \$10,001 - \$25,000
- 6 F. \$25,001 - \$50,000
- 7 G. More than \$50,000

Lead In: P5-142[Default] P5-145[Default] P5-146[Default]
 Default Next Question: P5-148

[P5-148]

Do %p5i_msfill1% have any other savings or substantial assets that we haven't already discussed -- for example money owed to you by others, the cash value of any whole or straight life insurance policies, future proceeds from a lawsuit or estate that is being settled, assets in a trust, annuity, or managed investment account, art work, precious metals, antiques, oil and gas leases, futures contracts, royalties or something else?

- 1 YES (Go To P5-149)
- 0 NO

Lead In: P5-147[Default]
 Default Next Question: P5-151

[P5-149]

What is the total dollar value %p5i_msfill1% have in these assets?

- Refusal(-1) (Go To P5-150)
- DONT KNOW(-2) (Go To P5-150)

Lead In: P5-148[1:1]
 Default Next Question: P5-151

[P5-150]

(HAND CARD D)

Please look at this card. Can you tell me the letter of the category that is your best estimate of the total dollar value of all of these assets?

- 1 A. \$1 - \$5,000
- 2 B. \$5,001 - \$10,000
- 3 C. \$10,001 - \$25,000
- 4 D. \$25,001 - \$50,000
- 5 E. \$50,001 - \$100,000
- 6 F. \$100,001 - \$250,000
- 7 G. More than \$250,000

Lead In: P5-149[-2:-1]

Default Next Question: P5-151

[P5-151]

Now I would like to ask you a few questions about any debts you might have other than mortgages and other real estate loans, business debts and auto loans.

Do %p5i_msfill1% owe any money on loans for your children's educational expenses?

- 1 YES (Go To P5-152)
- 0 NO

Lead In: P5-148[Default] P5-149[Default] P5-150[Default]

Default Next Question: P5-154

[P5-152]

How much in total do %p5i_msfill2% still owe on your educational loans for your children?

- Refusal(-1) (Go To P5-153)
- DONT KNOW(-2) (Go To P5-153)

Lead In: P5-151[1:1]

Default Next Question: P5-154

[P5-153]

(HAND CARD F)

Please look at this card. Can you tell me the letter of the category that is your best estimate of the total amount %p5i_msfill2% owe on your own education loans?

- 1 A. \$1 - \$1,000
- 2 B. \$1,001 - \$2,500
- 3 C. \$2,501 - \$5,000
- 4 D. \$5,001 - \$10,000

- 5 E. \$10,001 - \$25,000
- 6 F. \$25,001 - \$50,000
- 7 G. More than \$50,000

Lead In: P5-152[-2:-1]
Default Next Question: P5-154

[P5-154]

Do %p5i_msfill1% have any other debts that you CURRENTLY OWE MONEY ON that we have not already talked about? (Examples include store bills, credit cards, loans obtained through a bank or credit union, margin loans through a stock broker and other installment loans. Include credit cards only if the respondent carries a balance.)

- 1 YES (Go To P5-155)
- 0 NO

Lead In: P5-151[Default] P5-152[Default] P5-153[Default]
Default Next Question: P6-AGECK-002-LOOP-BEGIN

[P5-155]

What is the total amount %p5i_msfill2% owe altogether on these debts?

- Refusal(-1) (Go To P5-156)
- DONT KNOW(-2) (Go To P5-156)

Lead In: P5-154[1:1]
Default Next Question: P6-AGECK-002-LOOP-BEGIN

[P5-156]

(HAND CARD F)

Please look at this card. Can you tell me the letter of the category that is your best estimate of the total amount %p5i_msfill2% owe on these debts?

- 1 A. \$1 - \$1,000
- 2 B. \$1,001 - \$2,500
- 3 C. \$2,501 - \$5,000
- 4 D. \$5,001 - \$10,000
- 5 E. \$10,001 - \$25,000
- 6 F. \$25,001 - \$50,000
- 7 G. More than \$50,000

Lead In: P5-155[-2:-1]
Default Next Question: P6-AGECK-002-LOOP-BEGIN