

Assets (AS) Section

AS01

=====

Savings and investments are an important part of family finances. In these next questions, we are going to be asking about a number of different kinds of savings or investments the members of this family may have.
PRESS ENTER TO CONTINUE.

AS02

=====

Does anyone in the family own this home?
YES 1
NO 2 {AS16}
REF -7 {AS16}
DK -8 {AS16}
PRESS F1 FOR DEFINITION OF 'OWN THIS HOME'.

AS03

=====

Who in the family owns this home?
PROBE: Does anyone else in the family own this home?
CODE ALL THAT APPLY.
TO TURN CHECK MARK ON/OFF, USE ARROW KEYS, PRESS ENTER.
TO LEAVE, PRESS ESC.
[1. First Name, [Middle Name], Last Name-65] ...
[2. First Name, [Middle Name], Last Name-65] ...
[3. First Name, [Middle Name], Last Name-65] ...
[Code All That Apply]

| ROSTER DEFINITION: THIS ITEM DISPLAYS THE |
RU-MEMBERS-ROSTER.

| DISPLAY 'PERSON DECEASED' AND 'PERSON NOT IN RU' |
AS THE LAST TWO ENTRIES ON THE ROSTER.

AS04

=====

What is the present value of this home, that is, about how much would it bring if you sold it on today's market?
IF RESPONDENT IS NOT SURE, DO NOT PROBE. CODE 'DON'T KNOW' (SHIFT/8).
IF AMOUNT IS NOTHING, CODE '0'.

[Enter Whole \$ Worth] {AS06}
NOTHING 0 {AS06}
REF -7
DK -8

PRESS F1 FOR DEFINITION OF VALUE.

SOFT RANGE CHECK: \$1 - \$9,999,999

AS05

=====

DK -8
[Code One]

AS09
=====

Does anyone in the family own a second home?
YES 1
NO 2 {AS16}
REF -7 {AS16}
DK -8 {AS16}
PRESS F1 FOR DEFINITION OF SECOND HOME.

AS10
=====

Who in the family owns the second home?
PROBE: Does anyone else in the family own the second home?
CODE ALL THAT APPLY.
TO TURN CHECK MARK ON/OFF, USE ARROW KEYS, PRESS ENTER.
TO LEAVE, PRESS ESC.
[1. First Name, [Middle Name], Last Name-65] ...
[2. First Name, [Middle Name], Last Name-65] ...
[3. First Name, [Middle Name], Last Name-65] ...
[Code All That Apply]

| ROSTER DEFINITION: THIS ITEM DISPLAYS THE |
RU-MEMBERS-ROSTER.

| DISPLAY 'PERSON DECEASED' AND 'PERSON NOT IN RU' |
AS THE LAST TWO ENTRIES ON THE ROSTER.

AS11
=====

What is the present value of the second home, that is, about
how much would it bring if you sold it on today's market?
IF RESPONDENT IS NOT SURE, DO NOT PROBE. CODE 'DON'T KNOW'
(SHIFT/8).
IF AMOUNT IS NOTHING, CODE '0'.

[Enter Whole \$ Worth] {AS13}
NOTHING 0 {AS13}
REF -7
DK -8
PRESS F1 FOR DEFINITION OF VALUE.

SOFT RANGE CHECK: \$1 - \$9,999,999

AS12
=====

SHOW CARD AS-1.
Which category on the card best indicates the value of the
second home?
0 - 500 1
501 - 1,000 2
1,001 - 5,000 3
5,001 - 10,000 4

10,001 - 25,000	.....	5
25,001 - 50,000	.....	6
50,001 - 100,000	.....	7
100,001 - 250,000	.....	8
250,001 - 500,000	.....	9
500,001 - 1,000,000	.....	10
1,000,001 OR MORE	.....	11
REF	.....	-7
DK	.....	-8

[Code One]

AS13
====

Is any money owed or are there any loans outstanding on the second home?

PROBE: Please do not include any debt we've already talked about.

YES	.....	1
NO	.....	2 {AS16}
REF	.....	-7 {AS16}
DK	.....	-8 {AS16}

PRESS F1 FOR DEFINITION OF MONEY OWED AND OUTSTANDING LOANS.

AS14
====

How much is still owed for the second home?

IF RESPONDENT IS NOT SURE, DO NOT PROBE. CODE 'DON'T KNOW' (SHIFT/8).

[Enter Whole \$ Amount Owed]	.....	{AS16}
REF	.....	-7
DK	.....	-8

PRESS F1 FOR DEFINITION OF STILL OWED.

SOFT RANGE CHECK: \$1 - \$9,999,999

AS15
====

SHOW CARD AS-1.

Which category on the card best indicates the amount owed?

0 - 500	.....	1
501 - 1,000	.....	2
1,001 - 5,000	.....	3
5,001 - 10,000	.....	4
10,001 - 25,000	.....	5
25,001 - 50,000	.....	6
50,001 - 100,000	.....	7
100,001 - 250,000	.....	8
250,001 - 500,000	.....	9
500,001 - 1,000,000	.....	10
1,000,001 OR MORE	.....	11
REF	.....	-7
DK	.....	-8

[Code One]

AS16
====

Does anyone in the family own **part or all** of a farm or business
[other than what we have already talked about]?

YES 1
NO 2 {AS24}
REF -7 {AS24}
DK -8 {AS24}
PRESS F1 FOR DEFINITION OF FARM AND BUSINESS.

AS17
=====

How many farm(s) or business(es) are owned by the family?

[Enter Number-2]
REF -7
DK -8

SOFT RANGE CHECK: 1 - 10

AS18
=====

Who in the family owns the farm(s) or business(es)?
PROBE: Does anyone else in the family own the farm(s) or
business(es)?

CODE ALL THAT APPLY.
TO TURN CHECK MARK ON/OFF, USE ARROW KEYS, PRESS ENTER.
TO LEAVE, PRESS ESC.

[1. First Name, [Middle Name], Last Name-65] ...
[2. First Name, [Middle Name], Last Name-65] ...
[3. First Name, [Middle Name], Last Name-65] ...
[Code All That Apply]

| ROSTER DEFINITION: THIS ITEM DISPLAYS THE |
RU-MEMBERS-ROSTER.

| DISPLAY 'PERSON DECEASED' AND 'PERSON NOT IN RU' |
AS THE LAST TWO ENTRIES ON THE ROSTER.

AS19
=====

What are all the farm(s) or business(es) worth together if sold
today?

IF RESPONDENT IS NOT SURE, DO NOT PROBE. CODE 'DON'T KNOW'
(SHIFT/8).

IF AMOUNT IS NOTHING, CODE '0'.

[Enter Whole \$ Worth] {AS21}
NOTHING 0 {AS21}
REF -7
DK -8

PRESS F1 FOR DEFINITION OF WORTH.

SOFT RANGE CHECK: \$1 - \$9,999,999

AS20
=====

SHOW CARD AS-1.

Which category on the card best indicates the worth of the farm(s) or business(es) if sold today?

- 0 - 500 1
- 501 - 1,000 2
- 1,001 - 5,000 3
- 5,001 - 10,000 4
- 10,001 - 25,000 5
- 25,001 - 50,000 6
- 50,001 - 100,000 7
- 100,001 - 250,000 8
- 250,001 - 500,000 9
- 500,001 - 1,000,000 10
- 1,000,001 OR MORE 11
- REF -7
- DK -8

[Code One]

AS21

=====

Is any money owed or are there any loans outstanding on the farm(s) or business(es)?

PROBE: Please do not include any debt we've already talked about.

- YES 1
- NO 2 {AS24}
- REF -7 {AS24}
- DK -8 {AS24}

PRESS F1 FOR DEFINITION OF MONEY OWED AND OUTSTANDING LOANS.

AS22

=====

How much is still owed for the farm(s) or business(es)?

IF RESPONDENT IS NOT SURE, DO NOT PROBE. CODE 'DON'T KNOW' (SHIFT/8).

- [Enter Whole \$ Amount Owed] {AS24}
- REF -7
- DK -8

PRESS F1 FOR DEFINITION OF STILL OWED.

SOFT RANGE CHECK: \$1 - \$9,999,999

AS23

=====

SHOW CARD AS-1.

Which category on the card best indicates the amount owed?

- 0 - 500 1
- 501 - 1,000 2
- 1,001 - 5,000 3
- 5,001 - 10,000 4
- 10,001 - 25,000 5
- 25,001 - 50,000 6
- 50,001 - 100,000 7
- 100,001 - 250,000 8
- 250,001 - 500,000 9
- 500,001 - 1,000,000 10

1,000,001 OR MORE 11
 REF -7
 DK -8
 [Code One]

AS24
 =====

Does anyone in the family have any real estate such as land, rental real estate, a real estate partnership, or money owed to the family on a land contract or mortgage [other than what we have already talked about]?

YES 1
 NO 2 {AS31}
 REF -7 {AS31}
 DK -8 {AS31}
 PRESS F1 FOR DEFINITION OF REAL ESTATE.

AS25
 =====

Who in the family owns other properties or real estate (such as land, rental real estate, or a real estate partnership)?

PROBE: Does anyone else in the family own other properties or real estate (such as land, rental real estate, or a real estate partnership)?

CODE ALL THAT APPLY.
 TO TURN CHECK MARK ON/OFF, USE ARROW KEYS, PRESS ENTER.
 TO LEAVE, PRESS ESC.

- [1. First Name, [Middle Name], Last Name-65] ...
 - [2. First Name, [Middle Name], Last Name-65] ...
 - [3. First Name, [Middle Name], Last Name-65] ...
- [Code All That Apply]

 | ROSTER DEFINITION: THIS ITEM DISPLAYS THE |
RU-MEMBERS-ROSTER.

 | DISPLAY 'PERSON DECEASED' AND 'PERSON NOT IN RU' |
AS THE LAST TWO ENTRIES ON THE ROSTER.

AS26
 =====

Altogether, what is the present value of the other properties or real estate (such as land, rental real estate, or a real estate partnership), that is, about how much would it bring if you sold it on today's market?

IF RESPONDENT IS NOT SURE, DO NOT PROBE. CODE 'DON'T KNOW' (SHIFT/8).

IF AMOUNT IS NOTHING, CODE '0'.

[Enter Whole \$ Worth] {AS28}
 NOTHING 0 {AS28}
 REF -7
 DK -8

PRESS F1 FOR DEFINITION OF VALUE.

SOFT RANGE CHECK: \$1 - \$9,999,999

AS27

=====

SHOW CARD AS-1.

Which category on the card best indicates the value of the other properties or real estate (such as land, rental real estate, or a real estate partnership)?

- 0 - 500 1
- 501 - 1,000 2
- 1,001 - 5,000 3
- 5,001 - 10,000 4
- 10,001 - 25,000 5
- 25,001 - 50,000 6
- 50,001 - 100,000 7
- 100,001 - 250,000 8
- 250,001 - 500,000 9
- 500,001 - 1,000,000 10
- 1,000,001 OR MORE 11
- REF -7
- DK -8

[Code One]

AS28

=====

Is any money owed or are there any loans outstanding on the other properties or real estate (such as land, rental real estate, or a real estate partnership)?

PROBE: Please do not include any debt we've already talked about.

- YES 1
- NO 2 {AS31}
- REF -7 {AS31}
- DK -8 {AS31}

PRESS F1 FOR DEFINITION OF MONEY OWED AND OUTSTANDING LOANS.

AS29

=====

How much is still owed for the other properties or real estate (such as land, rental real estate, or a real estate partnership)?

IF RESPONDENT IS NOT SURE, DO NOT PROBE. CODE 'DON'T KNOW' (SHIFT/8).

- [Enter Whole \$ Amount Owed] {AS31}
- REF -7
- DK -8

PRESS F1 FOR DEFINITION OF STILL OWED.

| SOFT RANGE CHECK: \$1 - \$9,999,999 |

AS30

=====

SHOW CARD AS-1.

Which category on the card best indicates the amount owed?

- 0 - 500 1
- 501 - 1,000 2
- 1,001 - 5,000 3
- 5,001 - 10,000 4

====

Altogether, what is the present value of the transportation vehicles (such as cars, trucks, or vans), that is, about how much would it bring if you sold them on today's market? IF RESPONDENT IS NOT SURE, DO NOT PROBE. CODE 'DON'T KNOW' (SHIFT/8).

IF AMOUNT IS NOTHING, CODE '0'.

[Enter Whole \$ Worth] {AS36}
NOTHING 0 {AS36}
REF -7
DK -8

PRESS F1 FOR DEFINITION OF VALUE.

| SOFT RANGE CHECK: \$1 - \$9,999,999 |

AS35

====

SHOW CARD AS-1.

Which category on the card best indicates the value of the transportation vehicles (such as cars, trucks, or vans)?

0 - 500 1
501 - 1,000 2
1,001 - 5,000 3
5,001 - 10,000 4
10,001 - 25,000 5
25,001 - 50,000 6
50,001 - 100,000 7
100,001 - 250,000 8
250,001 - 500,000 9
500,001 - 1,000,000 10
1,000,001 OR MORE 11
REF -7
DK -8

[Code One]

AS36

====

Is any money owed or are there any loans outstanding on the transportation vehicles (such as cars, trucks, or vans)?

PROBE: Please do not include any debt we've already talked about.

YES 1
NO 2 {AS39}
REF -7 {AS39}
DK -8 {AS39}

PRESS F1 FOR DEFINITION OF MONEY OWED AND OUTSTANDING LOANS.

AS37

====

How much is still owed for the transportation vehicles (such as cars, trucks, or vans)?

IF RESPONDENT IS NOT SURE, DO NOT PROBE. CODE 'DON'T KNOW' (SHIFT/8).

[Enter Whole \$ Amount Owed] {AS39}
REF -7
DK -8

PRESS F1 FOR DEFINITION OF STILL OWED.

SOFT RANGE CHECK: \$1 - \$9,999,999

AS38

=====

SHOW CARD AS-1.

Which category on the card best indicates the amount owed?

0 - 500	1
501 - 1,000	2
1,001 - 5,000	3
5,001 - 10,000	4
10,001 - 25,000	5
25,001 - 50,000	6
50,001 - 100,000	7
100,001 - 250,000	8
250,001 - 500,000	9
500,001 - 1,000,000	10
1,000,001 OR MORE	11
REF	-7
DK	-8

[Code One]

AS39

=====

Does anyone in the family own any recreational vehicles, such as motorcycles, a trailer, a motor home, a boat, or an airplane?

YES	1
NO	2 {AS46}
REF	-7 {AS46}
DK	-8 {AS46}

PRESS F1 FOR DEFINITION OF RECREATIONAL VEHICLES.

AS40

=====

How many recreational vehicles (such as motorcycles, trailers, motor homes, boats, or airplanes) are owned by the family?

[Enter Number-2]	
REF	-7
DK	-8

SOFT RANGE CHECK: 1 - 15

AS41

=====

Altogether, what is the present value of the recreational vehicles (such as motorcycles, trailers, motor homes, boats, or airplanes), that is, about how much would it bring if you sold them on today's market?

IF RESPONDENT IS NOT SURE, DO NOT PROBE. CODE 'DON'T KNOW' (SHIFT/8).

IF AMOUNT IS NOTHING, CODE '0'.

[Enter Whole \$ Worth]	{AS43}
NOTHING	0 {AS43}
REF	-7

DK -8
PRESS F1 FOR DEFINITION OF VALUE.

SOFT RANGE CHECK: \$1 - \$9,999,999

AS42
=====

SHOW CARD AS-1.

Which category on the card best indicates the value of the recreational vehicles (such as motorcycles, trailers, motor homes, boats, or airplanes)?

0 - 500 1
501 - 1,000 2
1,001 - 5,000 3
5,001 - 10,000 4
10,001 - 25,000 5
25,001 - 50,000 6
50,001 - 100,000 7
100,001 - 250,000 8
250,001 - 500,000 9
500,001 - 1,000,000 10
1,000,001 OR MORE 11
REF -7
DK -8

[Code One]

AS43
=====

Is any money owed or are there any loans outstanding on the recreational vehicles (such as motorcycles, trailers, motor homes, boats, or airplanes)?

PROBE: Please do not include any debt we've already talked about.

YES 1
NO 2 {AS46}
REF -7 {AS46}
DK -8 {AS46}

PRESS F1 FOR DEFINITION OF MONEY OWED AND OUTSTANDING LOANS.

AS44
=====

How much is still owed for the recreational vehicles (such as motorcycles, trailers, motor homes, boats, or airplanes)?

IF RESPONDENT IS NOT SURE, DO NOT PROBE. CODE 'DON'T KNOW' (SHIFT/8).

[Enter Whole \$ Amount Owed] {AS46}
REF -7
DK -8

PRESS F1 FOR DEFINITION OF STILL OWED.

SOFT RANGE CHECK: \$1 - \$9,999,999

AS45
=====

SHOW CARD AS-1.

Which category on the card best indicates the amount owed?

- 0 - 500 1
- 501 - 1,000 2
- 1,001 - 5,000 3
- 5,001 - 10,000 4
- 10,001 - 25,000 5
- 25,001 - 50,000 6
- 50,001 - 100,000 7
- 100,001 - 250,000 8
- 250,001 - 500,000 9
- 500,001 - 1,000,000 10
- 1,000,001 OR MORE 11
- REF -7
- DK -8

[Code One]

AS46

=====

Does anyone in the family have any shares of stock or stock mutual funds [other than what we have already talked about]?

- YES 1
- NO 2 {AS50}
- REF -7 {AS50}
- DK -8 {AS50}

PRESS F1 FOR DEFINITION OF SHARES OF STOCK AND STOCK MUTUAL FUNDS.

AS47

=====

Who in the family owns the shares of stock or stock mutual funds?

PROBE: Does anyone else in the family own the shares of stock or stock mutual funds?

CODE ALL THAT APPLY.

TO TURN CHECK MARK ON/OFF, USE ARROW KEYS, PRESS ENTER.

TO LEAVE, PRESS ESC.

- [1. First Name, [Middle Name], Last Name-65] ...
- [2. First Name, [Middle Name], Last Name-65] ...
- [3. First Name, [Middle Name], Last Name-65] ...

[Code All That Apply]

| ROSTER DEFINITION: THIS ITEM DISPLAYS THE |
RU-MEMBERS-ROSTER.

| DISPLAY 'PERSON DECEASED' AND 'PERSON NOT IN RU' |
AS THE LAST TWO ENTRIES ON THE ROSTER.

AS48

=====

What are all the shares of stock or stock mutual funds worth together if sold today?

IF RESPONDENT IS NOT SURE, DO NOT PROBE. CODE 'DON'T KNOW' (SHIFT/8).

IF AMOUNT IS NOTHING, CODE '0'.

- [Enter Whole \$ Worth] {AS49A}
- NOTHING 0 {AS49A}
- REF -7

DK -8
PRESS F1 FOR DEFINITION OF WORTH.

SOFT RANGE CHECK: \$1 - \$9,999,999

AS49
=====

SHOW CARD AS-1.

Which category on the card best indicates the worth of the shares of stock or stock mutual funds if sold today?

0 - 500 1
501 - 1,000 2
1,001 - 5,000 3
5,001 - 10,000 4
10,001 - 25,000 5
25,001 - 50,000 6
50,001 - 100,000 7
100,001 - 250,000 8
250,001 - 500,000 9
500,001 - 1,000,000 10
1,000,001 OR MORE 11
REF -7
DK -8

[Code One]

AS49A
=====

Is any money owed or are there any loans outstanding on the purchase of the shares of stock or stock mutual funds?
PROBE: Please do not include any debt we've already talked about.

YES 1
NO 2 {AS50}
REF -7 {AS50}
DK -8 {AS50}

PRESS F1 FOR DEFINITION OF MONEY OWED AND OUTSTANDING LOANS.

AS49B
=====

How much is still owed for the shares of stock or stock mutual funds?

IF RESPONDENT IS NOT SURE, DO NOT PROBE. CODE 'DON'T KNOW' (SHIFT/8).

[Enter Whole \$ Amount Owed] {AS50}
REF -7
DK -8

PRESS F1 FOR DEFINITION OF STILL OWED.

SOFT RANGE CHECK: \$1 - \$9,999,999

AS49C
=====

SHOW CARD AS-1.

Which category on the card best indicates the amount owed?

0 - 500 1

```

501 - 1,000 ..... 2
1,001 - 5,000 ..... 3
5,001 - 10,000 ..... 4
10,001 - 25,000 ..... 5
25,001 - 50,000 ..... 6
50,001 - 100,000 ..... 7
100,001 - 250,000 ..... 8
250,001 - 500,000 ..... 9
500,001 - 1,000,000 ..... 10
1,000,001 OR MORE ..... 11
REF ..... -7
DK ..... -8

```

[Code One]

AS50

====

Does anyone in the family have any corporate, municipal, government, or foreign bonds, or bond funds [other than what we have already talked about]?

```

YES ..... 1
NO ..... 2 {AS57}
REF ..... -7 {AS57}
DK ..... -8 {AS57}

```

PRESS F1 FOR DEFINITION OF CORPORATE, MUNICIPAL, GOVERNMENT, FOREIGN BONDS AND BOND FUNDS.

AS51

====

Who in the family owns the corporate, municipal, government, or foreign bonds or bond funds?

PROBE: Does anyone else in the family own the corporate, municipal, government, or foreign bonds or bond funds?

CODE ALL THAT APPLY.

TO TURN CHECK MARK ON/OFF, USE ARROW KEYS, PRESS ENTER.

TO LEAVE, PRESS ESC.

```

[1. First Name, [Middle Name], Last Name-65] ...
[2. First Name, [Middle Name], Last Name-65] ...
[3. First Name, [Middle Name], Last Name-65] ...

```

[Code All That Apply]

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| ROSTER DEFINITION: THIS ITEM DISPLAYS THE          |
| RU-MEMBERS-ROSTER.                                |
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| DISPLAY 'PERSON DECEASED' AND 'PERSON NOT IN RU'  |
| AS THE LAST TWO ENTRIES ON THE ROSTER.           |
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AS52

====

What are all the corporate, municipal, government, or foreign bonds or bond funds worth together if sold today?

IF RESPONDENT IS NOT SURE, DO NOT PROBE. CODE 'DON'T KNOW' (SHIFT/8).

IF AMOUNT IS NOTHING, CODE '0'.

```

[Enter Whole $ Worth] ..... {AS54}
NOTHING ..... 0 {AS54}

```

REF -7
DK -8
PRESS F1 FOR DEFINITION OF WORTH.

SOFT RANGE CHECK: \$1 - \$9,999,999

AS53
=====

SHOW CARD AS-1.

Which category on the card best indicates the worth of these corporate, municipal, government, or foreign bonds or bond funds if sold today?

0 - 500 1
501 - 1,000 2
1,001 - 5,000 3
5,001 - 10,000 4
10,001 - 25,000 5
25,001 - 50,000 6
50,001 - 100,000 7
100,001 - 250,000 8
250,001 - 500,000 9
500,001 - 1,000,000 10
1,000,001 OR MORE 11
REF -7
DK -8

[Code One]

BOX_01
=====

OMITTED.

AS54
=====

Is any money owed or are there any loans outstanding on the purchase of the corporate, municipal, government, or foreign bonds, or bond funds?

PROBE: Please do not include any debt we've already talked about.

YES 1
NO 2 {AS57}
REF -7 {AS57}
DK -8 {AS57}

PRESS F1 FOR DEFINITION OF MONEY OWED AND OUTSTANDING LOANS.

AS55
=====

How much is still owed for the corporate, municipal, government, or foreign bonds, or bond funds?

IF RESPONDENT IS NOT SURE, DO NOT PROBE. CODE 'DON'T KNOW' (SHIFT/8).

[Enter Whole \$ Amount Owed] {AS57}
REF -7
DK -8

PRESS F1 FOR DEFINITION OF STILL OWED.

SOFT RANGE CHECK: \$1 - \$9,999,999

AS56
=====

SHOW CARD AS-1.
Which category on the card best indicates the amount owed?

0 - 500	1
501 - 1,000	2
1,001 - 5,000	3
5,001 - 10,000	4
10,001 - 25,000	5
25,001 - 50,000	6
50,001 - 100,000	7
100,001 - 250,000	8
250,001 - 500,000	9
500,001 - 1,000,000	10
1,000,001 OR MORE	11
REF	-7
DK	-8

[Code One]

AS57
=====

Does anyone in the family have any Individual Retirement
Accounts,
that is, IRA or Keogh accounts?

YES	1
NO	2 {AS62}
REF	-7 {AS62}
DK	-8 {AS62}

PRESS F1 FOR DEFINITION OF IRA AND KEOGH ACCOUNTS.

AS58
=====

How many IRA or Keogh accounts does the family have?
[Enter Number-2]

REF	-7
DK	-8

SOFT RANGE CHECK: 1 - 20

AS59
=====

Who in the family has IRA or Keogh accounts?
PROBE: Does anyone else in the family have IRA or Keogh
accounts?
CODE ALL THAT APPLY.
TO TURN CHECK MARK ON/OFF, USE ARROW KEYS, PRESS ENTER.
TO LEAVE, PRESS ESC.

- [1. First Name, [Middle Name], Last Name-65] ...
- [2. First Name, [Middle Name], Last Name-65] ...
- [3. First Name, [Middle Name], Last Name-65] ...

[Code All That Apply]

| ROSTER DEFINITION: THIS ITEM DISPLAYS THE |
RU-MEMBERS-ROSTER.

| DISPLAY 'PERSON DECEASED' AND 'PERSON NOT IN RU' |
AS THE LAST TWO ENTRIES ON THE ROSTER.

AS60

=====

Altogether, what is the current value of these IRA or Keogh accounts?

IF RESPONDENT IS NOT SURE, DO NOT PROBE. CODE 'DON'T KNOW' (SHIFT/8).

[Enter Whole \$ Amount] {AS62}

REF -7

DK -8

PRESS F1 FOR DEFINITION OF VALUE.

SOFT RANGE CHECK: \$1 - \$9,999,999

AS61

=====

SHOW CARD AS-1.

Which category on the card best indicates the value of these IRA or Keogh accounts?

0 - 500 1

501 - 1,000 2

1,001 - 5,000 3

5,001 - 10,000 4

10,001 - 25,000 5

25,001 - 50,000 6

50,001 - 100,000 7

100,001 - 250,000 8

250,001 - 500,000 9

500,001 - 1,000,000 10

1,000,001 OR MORE 11

REF -7

DK -8

[Code One]

AS62

=====

Does anyone in the family have any money in certificates of deposit (CDs), government savings bonds, or treasury bills [other than what we have already talked about]?

YES 1

NO 2 {AS67}

REF -7 {AS67}

DK -8 {AS67}

PRESS F1 FOR DEFINITION OF CERTIFICATES OF DEPOSIT,
GOVERNMENT SAVINGS BONDS, AND TREASURY BILLS.

AS63

=====

How many certificates of deposit, savings bonds, or treasury bills does the family have?

[Enter Number-2]

REF -7
DK -8

SOFT RANGE CHECK: 1 - 50

AS64

=====

Who in the family owns the certificates of deposit, savings bonds, or treasury bills?

PROBE: Does anyone else in the family own certificates of deposit, savings bonds, or treasury bills?

CODE ALL THAT APPLY.

TO TURN CHECK MARK ON/OFF, USE ARROW KEYS, PRESS ENTER.

TO LEAVE, PRESS ESC.

[1. First Name, [Middle Name], Last Name-65] ...
[2. First Name, [Middle Name], Last Name-65] ...
[3. First Name, [Middle Name], Last Name-65] ...
[Code All That Apply]

| ROSTER DEFINITION: THIS ITEM DISPLAYS THE |
RU-MEMBERS-ROSTER.

| DISPLAY 'PERSON DECEASED' AND 'PERSON NOT IN RU' |
AS THE LAST TWO ENTRIES ON THE ROSTER.

AS65

=====

Altogether, how much is in these certificates of deposit, savings bonds, or treasury bills?

IF RESPONDENT IS NOT SURE, DO NOT PROBE. CODE 'DON'T KNOW' (SHIFT/8).

[Enter Whole \$ Amount] {AS67}

REF -7

DK -8

PRESS F1 FOR DEFINITION OF 'HOW MUCH IS IN'.

SOFT RANGE CHECK: \$1 - \$9,999,999

AS66

=====

SHOW CARD AS-1.

Which category on the card best indicates the amount in these certificates of deposit, savings bonds, or treasury bills?

0 - 500 1
501 - 1,000 2
1,001 - 5,000 3
5,001 - 10,000 4
10,001 - 25,000 5
25,001 - 50,000 6
50,001 - 100,000 7
100,001 - 250,000 8
250,001 - 500,000 9
500,001 - 1,000,000 10

1,000,001 OR MORE 11
REF -7
DK -8
[Code One]

AS67
=====

Does anyone in the family have any money in checking or savings accounts, or money market funds [other than what we have already talked about]?

YES 1
NO 2 {AS72}
REF -7 {AS72}
DK -8 {AS72}

PRESS F1 FOR DEFINITION OF CHECKING, SAVINGS, AND MONEY MARKET ACCOUNTS.

AS68
=====

How many checking, savings, or money market accounts does the family have?

[Enter Number-2]
REF -7
DK -8

SOFT RANGE CHECK: 1 - 20

AS69
=====

Who in the family has checking, savings, or money market accounts?

PROBE: Does anyone else in the family have checking, savings, or money market accounts?

CODE ALL THAT APPLY.

TO TURN CHECK MARK ON/OFF, USE ARROW KEYS, PRESS ENTER.

TO LEAVE, PRESS ESC.

[1. First Name, [Middle Name], Last Name-65] ...
[2. First Name, [Middle Name], Last Name-65] ...
[3. First Name, [Middle Name], Last Name-65] ...
[Code All That Apply]

| ROSTER DEFINITION: THIS ITEM DISPLAYS THE |
RU-MEMBERS-ROSTER.

| DISPLAY 'PERSON DECEASED' AND 'PERSON NOT IN RU' |
AS THE LAST TWO ENTRIES ON THE ROSTER.

AS70
=====

Altogether, how much is in these checking, savings, or money market accounts?

IF RESPONDENT IS NOT SURE, DO NOT PROBE. CODE 'DON'T KNOW' (SHIFT/8).

[Enter Whole \$ Amount] {AS72}
REF -7

DK -8

| SOFT RANGE CHECK: \$1 - \$9,999,999 |

AS71

=====

SHOW CARD AS-1.

Which category on the card best indicates the amount in these checking, savings, or money market accounts?

- 0 - 500 1
- 501 - 1,000 2
- 1,001 - 5,000 3
- 5,001 - 10,000 4
- 10,001 - 25,000 5
- 25,001 - 50,000 6
- 50,001 - 100,000 7
- 100,001 - 250,000 8
- 250,001 - 500,000 9
- 500,001 - 1,000,000 10
- 1,000,001 OR MORE 11
- REF -7
- DK -8

[Code One]

AS72

=====

Does anyone in the family have any other savings or assets, such as jewelry, money owed to you by others, a collection for investment purposes, rights in a trust or estate where someone in the family is the beneficiary, or an annuity [that you haven't already told me about]?

- YES 1
- NO 2 {AS76}
- REF -7 {AS76}
- DK -8 {AS76}

PRESS F1 FOR DEFINITION OF 'OTHER SAVINGS OR ASSETS'.

AS73

=====

Who in the family has other savings or assets [such as jewelry, money owed to you, a collection for investment purposes, rights in a trust or estate, or an annuity]?

PROBE: Does anyone else in the family have other savings or assets [such as jewelry, money owed to you, a collection for investment purposes, rights in a trust or estate, or an annuity]?

CODE ALL THAT APPLY.

TO TURN CHECK MARK ON/OFF, USE ARROW KEYS, PRESS ENTER.

TO LEAVE, PRESS ESC.

- [1. First Name, [Middle Name], Last Name-65] ...
- [2. First Name, [Middle Name], Last Name-65] ...
- [3. First Name, [Middle Name], Last Name-65] ...

[Code All That Apply]

| ROSTER DEFINITION: THIS ITEM DISPLAYS THE |

| RU-MEMBERS-ROSTER. |

```

-----
| DISPLAY 'PERSON DECEASED' AND 'PERSON NOT IN RU' |
| AS THE LAST TWO ENTRIES ON THE ROSTER.          |
-----

```

AS74

====

What are all the other savings or assets [such as jewelry, money owed to you, a collection for investment purposes, rights in a trust or estate, or an annuity] worth together?

IF RESPONDENT IS NOT SURE, DO NOT PROBE. CODE 'DON'T KNOW' (SHIFT/8).

IF AMOUNT IS NOTHING, CODE '0'.

```

[Enter Whole $ Worth] ..... {AS76}
NOTHING ..... 0 {AS76}
REF ..... -7
DK ..... -8

```

PRESS F1 FOR DEFINITION OF WORTH.

```

-----
| SOFT RANGE CHECK: $1 - $9,999,999              |
-----

```

AS75

====

SHOW CARD AS-1.

Which category on the card best indicates the worth of the other savings or assets?

```

0 - 500 ..... 1
501 - 1,000 ..... 2
1,001 - 5,000 ..... 3
5,001 - 10,000 ..... 4
10,001 - 25,000 ..... 5
25,001 - 50,000 ..... 6
50,001 - 100,000 ..... 7
100,001 - 250,000 ..... 8
250,001 - 500,000 ..... 9
500,001 - 1,000,000 ..... 10
1,000,001 OR MORE ..... 11
REF ..... -7
DK ..... -8

```

[Code One]

AS76

====

Does anyone in the family have any debts that we haven't asked about, such as credit card balances, medical debts, life

insurance

policy loans, loans from relatives, and so forth?

```

YES ..... 1
NO ..... 2 {BOX_02}
REF ..... -7 {BOX_02}
DK ..... -8 {BOX_02}

```

PRESS F1 FOR DEFINITION OF DEBTS.

AS77

====

Who in the family has the debts [such as credit card balances,

medical debts, life insurance policy loans, loans from relatives and so forth]?

PROBE: Does anyone else in the family have the debts [such as credit card balances, medical debts, life insurance policy loans, loans from relatives and so forth]?

CODE ALL THAT APPLY.

TO TURN CHECK MARK ON/OFF, USE ARROW KEYS, PRESS ENTER.

TO LEAVE, PRESS ESC.

- [1. First Name, [Middle Name], Last Name-65] ...
 - [2. First Name, [Middle Name], Last Name-65] ...
 - [3. First Name, [Middle Name], Last Name-65] ...
- [Code All That Apply]

| ROSTER DEFINITION: THIS ITEM DISPLAYS THE |
RU-MEMBERS-ROSTER.

| DISPLAY 'PERSON DECEASED' AND 'PERSON NOT IN RU' |
AS THE LAST TWO ENTRIES ON THE ROSTER.

AS78

=====

How much do these debts amount to?

IF RESPONDENT IS NOT SURE, DO NOT PROBE. CODE 'DON'T KNOW' (SHIFT/8).

[Enter Whole \$ Amount Owed] {BOX_02}
REF -7
DK -8
PRESS F1 FOR DEFINITION OF 'DEBTS AMOUNT TO'.

SOFT RANGE CHECK: \$1 - \$9,999,999

AS79

=====

SHOW CARD AS-1.

Which category on the card best indicates the amount owed?

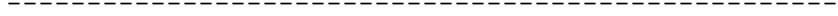
0 - 500 1
501 - 1,000 2
1,001 - 5,000 3
5,001 - 10,000 4
10,001 - 25,000 5
25,001 - 50,000 6
50,001 - 100,000 7
100,001 - 250,000 8
250,001 - 500,000 9
500,001 - 1,000,000 10
1,000,001 OR MORE 11
REF -7
DK -8

[Code One]

BOX_02

=====

GO TO NEXT QUESTIONNAIRE SECTION.



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