MODULE 4: ASSET OWNERSHIP

V151_CHKSAVWHO_FIN_IC_228
(piRTab1X009AModule_V = MODULE4)
1  EXPR IS FALSE   GO TO V202_Homevalue_IC_240/MODULE 5
2  EXPR IS TRUE

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V000_ModuleIntro
Although we have finished the interview, we would like to ask you a few new questions. Some questions may be similar to questions we have already asked you, but the researchers are interested in how people respond when the questions are changed just a little.

   1  R IS WILLING
   9  R REFUSED   GO TO END OF MODULE 4

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V151_CHKSAVWHO_FIN_IC_230
(piRTab1X007AFinFam IN [FINANCIAL_FAMILYR , FINANCIALR])
1  EXPR IS FALSE   GO TO V161_CHKSAV_NONF
2  EXPR IS TRUE

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V151_CHKSAVWHO_FIN_IC_231
(piSecQCHECKINGQ344 = YES)
{=HH HAS CHECKING, SAVINGS OR MONEY MARKET ACCOUNT}
1  EXPR IS FALSE   GO TO V156_STOCKSJNT_FINR_IC_233
2  EXPR IS TRUE
V151_CHKSAVWHO_FIN

Earlier you told me that you or your [husband/wife/partner] have money in money market, savings or checking accounts. Are all of these accounts jointly owned with your [husband/wife/partner], are some in your name only or are some in your [husband/wife/partner]'s name only?

[IWER: CHOOSE ALL THAT APPLY]

1  ALL HELD JOINTLY                  GO TO V156_STOCKSJT_FINR_IC_233
2  SOME IN R'S NAME                  GO TO V156_STOCKSJT_FINR_IC_233
3  SOME IN SPOUSE/PARTNER'S NAME     GO TO V156_STOCKSJT_FINR_IC_233
8  DON'T KNOW                        GO TO V156_STOCKSJT_FINR_IC_233
9  REFUSED                           GO TO V156_STOCKSJT_FINR_IC_233

V152_SPP_ACCOUNTAMT

Excluding money in joint accounts and accounts in your name, what is the total value of the money market, savings and checking accounts held in your [husband/wife/partner]'s name?

[IWER: DO NOT PROBE DK/RF]

AMOUNT: $_________________________    GO TO V156_STOCKSJT_FINR_IC_233

0 - 10,000,000  Actual Range

99,999,998  DON'T KNOW
99,999,999  REFUSED

UNFOLDING {V153_, V154_, V153_}SPP_ACCOUNTAMT

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

PROCEDURES: UNFM_3up, UNFM_2Up1Down, UNFM_1Up2Down
BREAKPOINTS: $5,000, $50,000, $150,000, $300,000
RANDOM ENTRY POINTS: $5,000, $50,000, $150,000
ENTRY POINT ASSIGNMENT 1, 2 OR 3 AT X046
**(V156_STOCKSJNT_FINR_IC_233)**

*(piStockAssetIncomeQ316_ = YES)*

1. **EXPR IS FALSE**  
   **GO TO END OF MODULE 4**

2. **EXPR IS TRUE**

**(V156_STOCKSJNT_FINR)**

Earlier you told me that you or your [husband/wife/partner] have money in stocks or stock mutual funds.

Are all of these stocks or stock mutual funds held jointly with your [husband/wife/partner], are some in your name only or are some in your [husband/wife/partner]’s name only?

[IWER: CHOOSE ALL THAT APPLY]

1. **ALL HELD JOINTLY**  
   **GO TO END OF MODULE 4**

2. **SOME IN R’S NAME**  
   **GO TO END OF MODULE 4**

3. **SOME IN SPOUSE/PARTNER’S NAME**

8. **DON’T KNOW**  
   **GO TO END OF MODULE 4**

9. **REFUSED**  
   **GO TO END OF MODULE 4**

**(V157_SP_AMTSTOCKS)**

If your [husband/wife/partner] sold all the stock and stock mutual funds [he/she] owns [his/her] self and paid off anything [he/she] owed on them, about how much would [he/she] have?

[IWER: DO NOT PROBE DK/RF]

**AMOUNT:** $_________________________  
**GO TO END OF MODULE 4**

0 - 10,000,000  Actual Range

99,999,998  **DON’T KNOW**

99,999,999  **REFUSED**

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**UNFOLDING {V158_, V154_, V160_}SP_AMTSTOCKS**

Question text: Would it amount to a total of less than $_____, more than $_____, or what?

**PROCEDURES:** UNFM_3up, UNFM_2Up1Down, UNFM_1Up2Down  
**BREAKPOINTS:** $2,500, $25,000, $125,000, $400,000  
**RANDOM ENTRY POINTS:** $2,500, $25,000, $125,000  
**ENTRY POINT ASSIGNMENT 1, 2 OR 3 AT X046**
Now I have just a few questions about your finances.

Do you [or your [husband/wife/partner]] have any checking or savings accounts or money market funds?

1 YES
5 NO  GO TO V171_STOCKS_NONF
8 DON'T KNOW  GO TO V171_STOCKS_NONF
9 REFUSED  GO TO V171_STOCKS_NONF

If you added up all such accounts, about how much would they amount to right now?

IWER: DO NOT PROBE DK/RF

AMOUNT: $ __________________________  GO TO V167_ACCNTAMT_NON_IC_236

0 - 99,999,996  Actual Range

99,999,998 DON'T KNOW
99,999,999 REFUSED

UNFOLDING {V163_, V164_, V165_}CHKSAVAMT_NONF

Question text: Would they be less than $____ , more than $____ , or what?

PROCEDURES: UNFM_3up, UNFM_2Up1Down, UNFM_1Up2Down
BREAKPOINTS: $5,000, $50,000, $150,000, $300,000
RANDOM ENTRY POINTS: $5,000, $50,000, $150,000
ENTRY POINT ASSIGNMENT 1, 2 OR 3 AT X046
V166_CHKSAVWHO_NON

Are all of these money market, savings and checking accounts held jointly with your [husband/wife/partner], are some in your name only or are some in your [husband/wife/partner]'s name only?

[IWER: CHOOSE ALL THAT APPLY]

1  ALL HELD JOINTLY  GO TO V171_STOCKS_NONF
2  SOME IN R'S NAME  GO TO V171_STOCKS_NONF
3  SOME IN SPOUSE/PARTNER'S NAME  
8  DON'T KNOW  GO TO V171_STOCKS_NONF
9  REFUSED  GO TO V171_STOCKS_NONF

V167_ACCNTAMT_NON

Excluding money in joint accounts and accounts in your [husband/wife/partner]'s name, what is the total value of the money market, savings and checking accounts held in your name?

[IWER: DO NOT PROBE DK/RF]

AMOUNT: $____________________________  GO TO V171_STOCKS_NONF

0 - 10,000,000  Actual Range
99,999,998  DON'T KNOW
99,999,999  REFUSED

UNFOLDING {V168_, V169_, V170_}ACCNTAMT_NON

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

PROCEDURES: UNFM_3up, UNFM_2Up1Down, UNFM_1Up2Down
BREAKPOINTS: $5,000, $50,000, $150,000, $300,000
RANDOM ENTRY POINTS: $5,000, $50,000, $150,000
ENTRY POINT ASSIGNMENT 1, 2 OR 3 AT X046
V171_STOCKS_NONF

Do you [or your [husband/wife/partner]] have any shares of stock or stock mutual funds?

1  YES
5  NO  GO TO END OF MODULE 4
8  DON'T KNOW  GO TO END OF MODULE 4
9  REFUSED  GO TO END OF MODULE 4

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V172_STOCKAMT_NONF

If you sold all those and paid off anything you owed on them, about how much would you have?

IWER: DO NOT PROBE DK/RF

AMOUNT: $ __________________________________  GO TO V176_STOCKSJNT_FINR
-1,000,000 - 99,999,996  Actual Range

99,999,998  DON'T KNOW
99,999,999  REFUSED

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UNFOLDING {V173_, V174_, V175_]ACCNTAMT_NONF

Question text: Would it amount to less than $____ , more than $____ , or what?

PROCEDURES: UNFM_3up, UNFM_2Up1Down, UNFM_1Up2Down
BREAKPOINTS: $2,500, $25,000, $125,000, $400,000
RANDOM ENTRY POINTS: $2,500, $25,000, $125,000
ENTRY POINT ASSIGNMENT 1, 2 OR 3 AT X046
Are all of these stocks or stock mutual funds held jointly with your [husband/wife/partner], are some in your name only or are some in your [husband/wife/partner]'s name only?

[IWER: CHOOSE ALL THAT APPLY]

1. ALL HELD JOINTLY  
2. SOME IN R’S NAME  
3. SOME IN SPOUSE/PARTNER’S NAME  
8. DON’T KNOW  
9. REFUSED

If you sold all the stock and stock mutual funds you, yourself, own and paid off anything you owed on them, about how much would you have?

[IWER: DO NOT PROBE DK/RF]

AMOUNT: $ _____________  
0 - 10,000,000  Actual Range

99,999,998  DON’T KNOW  
99,999,999  REFUSED

Would it amount to a total of less than $____ , more than $____ , or what?

PROCEDURES: UNFM_3up, UNFM_2Up1Down, UNFM_1Up2Down  
BREAKPOINTS: $2,500, $25,000, $125,000, $400,000  
RANDOM ENTRY POINTS: $2,500, $25,000, $125,000  
ENTRY POINT ASSIGNMENT 1, 2 OR 3 AT X046