

HRS 2018 -- SECTION R: ASSET CHANGE  
FINAL VERSION -- 05/31/2018

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**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.**

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**NOTE ABOUT COLORS:**

**ALL TEXT IN TEAL IS SPECIFIC TO A WEB INTERVIEW.**

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

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**NOTE ABOUT NON-RESPONSE FLOW:**

ANY QUESTION THAT IS ASKED BUT LEFT WITHOUT A RESPONSE IN CAWI INTERVIEWS WILL  
FOLLOW THE SAME PATH AS A REFUSAL FOR THAT QUESTION, UNLESS OTHERWISE  
SPECIFIED.

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**MAJOR FLOW CONTROL, CONDITION AND FILL VARIABLES \***

THIS IS A **REINTERVIEW HH** (X024=1);  
THIS IS A **NEW INTERVIEW HH** (X024 NOT 1)

THIS IS A **REINTERVIEW R** (Z076=1);  
THIS IS A **NEW SPOUSE/PARTNER** OF A REINTERVIEW R (Z076=0);  
THIS IS A **NEVER INTERVIEWED R** (Z076=5)

THIS IS A **FINANCIAL R** (X007=1);  
THIS IS A **FAMILY R** (X007=2);  
THIS IS A **FINANCIAL & FAMILY R** (X007=3);  
THIS IS A **NON-FINANCIAL & NON-FAMILY R** (X007=4);

**FINANCIAL R's LAST IW MONTH** (per X038), **YEAR** (per X039)

R OWNED A MAIN RESIDENCE OR {MOBILE {HOME AND/OR SITE}} OR FARM AT R's LAST IW (X079=1)

R WAS ASKED ABOUT VALUE OF MAIN RESIDENCE (H020 NOT EMPTY);  
R WAS ASKED ABOUT VALUE OF SECOND RESIDENCE (H166} NOT EMPTY)

R CURRENTLY OWNS MAIN RESIDENCE (H004=1);  
R CURRENTLY OWNS {SECOND RESIDENCE OR CONDO} (H151=1)  
R CURRENTLY OWNS {ALL or PART OF} FARM (H008={1 or 2});  
R CURRENTLY OWNS {MOBILE HOME AND SITE} (H014=1);

R OWNED REAL ESTATE OTHER THAN HOME IN R's LAST IW (Z098=1;  
R CURRENTLY OWNS REAL ESTATE OTHER THAN HOME/FARM/BUSINESS (Q133={1 or 2})

R OWNED BUSINESS OTHER THAN FARM AT R's LAST IW (X086=1);  
R CURRENTLY OWNS BUSINESS OTHER THAN FARM (Q147 ={1 or 2})

R OWNED {STOCKS OR STOCK MUTUAL FUNDS} AT R's LAST IW (X087 NOT 1);  
R CURRENTLY OWNS {STOCKS OR STOCK MUTUAL FUNDS} (Q316 NOT 1)

NUMBER OF CHILDREN/HHMS MOVED {IN OR OUT} OF HH SINCE R's LAST IW (per A102);  
NO ONE MOVED {IN OR OUT} OF HH SINCE R's LAST IW (A102=0)

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\* 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.

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R002 BRANCHPOINT: IF THIS IS AN EXIT IW, GO TO SECTION T

IF THIS IS A NEW INTERVIEW HH (X024 NOT 1) or NOT A FINANCIAL R (X007 {NOT 1 and NOT 3}), GO TO SECTION S

IF R OWNED A {FIRST or SECOND} RESIDENCE AT R's LAST IW (X079=1) or R NOW OWNS {{FIRST HOME or {SECOND HOME OR CONDO}}{H004 or H151}=1} or {MOBILE HOME AND/OR SITE} (H014={1 or 2 or 3}) or FARM (H008={1 or 2}), CONTINUE ON TO R002

OTHERWISE, GO TO R028 BRANCHPOINT

R002

Now we'd like to ask you some questions about the changes in your (family's) finances since we last talked to you. [Since FINANCIAL R's LAST IW MONTH (per X038), YEAR (per X039)/In the last two years], have you [or your [husband/wife/ partner]] bought or sold a home that was your primary residence or second home?

- 1. YES
- 5. NO.....GO TO R023
- DK.....GO TO R023
- RF.....GO TO R023

R003

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

[INSTR: IF THERE WERE MULTIPLE SALES OR PURCHASES, SELECT 'OTHER (SPECIFY)'.]

- 1. ONLY BOUGHT.....GO TO R006
- 2. ONLY SOLD.....GO TO R012 BRANCHPOINT
- 3. BOTH BOUGHT AND SOLD.....GO TO R006
- 7. OTHER (SPECIFY) \_\_\_\_\_
- DK.....GO TO R023
- RF.....GO TO R023

R004

Please describe the transaction(s), including the month, year, and purchase price for each home.

OPEN \_\_\_\_\_

R006 BRANCHPOINT: GO TO R023

R006

In what year did you buy a home?

YEAR \_\_\_\_\_

- DK.....GO TO R007
- RF.....GO TO R007

R005 BRANCHPOINT: IF YEAR AT R006 WAS MORE THAN 2 YEARS AGO, GO TO R007

R005

What month was that?

[drop down]

- 01. JAN
- 02. FEB
- 03. MAR
- 04. APR
- 05. MAY
- 06. JUN
- 07. JUL
- 08. AUG
- 09. SEP
- 10. OCT
- 11. NOV
- 12. DEC
- DK
- RF

R007

What was the purchase price?

[INSTR: DO NOT PROBE DK/RF.]

What was the purchase price?

\$ \_\_\_\_\_ .00 GO TO R012 BRANCHPOINT

- DK
- RF

R008-R010

Question text: (Thinking about the purchase price:)

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

Question text: Thinking about the purchase price:

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

R012 BRANCHPOINT: IF R BOUGHT BUT DID NOT SELL A HOME (R003=1), GO TO R023

R012

In what year did you sell a home?

YEAR \_\_\_\_\_

DK.....GO TO R013

RF.....GO TO R013

R011 BRANCHPOINT: IF YEAR AT R012 WAS MORE THAN 2 YEARS AGO, GO TO R013

R011

What month was that?

[drop down]

01. JAN

02. FEB

03. MAR

04. APR

05. MAY

06. JUN

07. JUL

08. AUG

09. SEP

10. OCT

11. NOV

12. DEC

DK

RF

R013

What was the selling price?

[INSTR: DO NOT PROBE DK/RF.]

What was the selling price?

\$ \_\_\_\_\_ .00 GO TO R018

DK

RF

R014-R016

Question text: (Thinking about the selling price:)

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

Question text: Thinking about the selling price:

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

R018

In what year did you buy that home?

[INSTR: THIS REFERS TO THE HOME THAT THEY SOLD.]

In what year did you buy that home?

[INSTR: THIS REFERS TO THE HOME THAT YOU SOLD.]

YEAR \_\_\_\_\_

DK.....GO TO R019

RF.....GO TO R019

R017 BRANCHPOINT: IF YEAR AT R018 WAS MORE THAN 2 YEARS AGO, GO TO R019

R017

What month was that?

[drop down]

01. JAN

02. FEB

03. MAR

04. APR

05. MAY

06. JUN

07. JUL

08. AUG

09. SEP

10. OCT

11. NOV

12. DEC

DK

RF

R019

What was the purchase price?

[INSTR: THIS REFERS TO THE HOME THAT THEY SOLD.]

[INSTR: DO NOT PROBE DK/RF.]

What was the purchase price?

[INSTR: THIS REFERS TO THE HOME THAT YOU SOLD.]

\$\_\_\_\_\_ .00 GO TO R023

DK

RF

R020-R022

Question text: (Thinking about the purchase price:)

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

Question text: Thinking about the purchase price:

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

R023

IF R OWNS {SECOND HOME OR CONDO OR OWN TIMESHARES IN ONE} (X027=0 or H151=1):  
[Since FINANCIAL R's LAST IW MONTH, YEAR/In the last two years], did you [or your  
[husband/wife/partner]] make any major additions or home improvements to a primary  
residence or second home that you owned?

OTHERWISE:

[Since FINANCIAL R's LAST IW MONTH, YEAR/In the last two years], did you [or your  
[husband/wife/partner]] make any major additions or home improvements to a primary  
residence that you owned?

[INSTR: DO NOT COUNT GENERAL MAINTENANCE OR UPKEEP.]

1. YES

5. NO.....GO TO R028 BRANCHPOINT

DK.....GO TO R028 BRANCHPOINT

RF.....GO TO R028 BRANCHPOINT

R024

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

[INSTR: DO NOT PROBE DK/RF.]

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

\$\_\_\_\_\_ .00 GO TO R028 BRANCHPOINT

DK  
RF

R025-R027

Question text: (Thinking about the dollar cost of these additions and improvements:)

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down  
BREAKPOINTS: \$2,000, **\$10,000**, \$50,000  
ENTRY POINT: \$10,000

Question text: Thinking about the dollar cost of these additions and improvements:

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down  
BREAKPOINTS: \$2,000, **\$10,000**, \$50,000  
ENTRY POINT: \$10,000

R028 BRANCHPOINT: IF R DID NOT REPORT OWNING ANY REAL ESTATE OTHER THAN HOME/FARM/BUSINESS {IN R's LAST IW (Z098 NOT 1) and IN THIS IW (Q133 {NOT 1 and NOT 2})}, GO TO R049 BRANCHPOINT

R028

[Since FINANCIAL R's LAST IW MONTH, YEAR/In the last two years], have you [or your [husband/wife/partner]] sold any real estate other than your principal residence or second home, such as land, or rental or investment property?

1. YES.....GO TO R034  
5. NO  
DK  
RF

R029

Have you bought any such real estate properties [since [MONTH] [YEAR]/in the last two years]?

1. YES  
5. NO.....GO TO R044  
DK.....GO TO R044  
RF.....GO TO R044

R030



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

[INSTR: DO NOT PROBE DK/RF.]

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

\$\_\_\_\_\_ .00 GO TO R035 BRANCHPOINT

DK

RF

R031-R033

Question text: (Thinking about how much you paid in total for this real estate:)

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

BREAKPOINTS: \$50,000, **\$200,000**, \$500,000

ENTRY POINT: \$200,000

Question text: Thinking about how much you paid in total for this real estate:

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

BREAKPOINTS: \$50,000, **\$200,000**, \$500,000

ENTRY POINT: \$200,000

R034 BRANCHPOINT: GO TO R035 BRANCHPOINT

R034

Did you [and your [husband/wife/partner]] also buy any real estate of this sort [since FINANCIAL R's LAST IW MONTH, YEAR/in the last two years]?

1. YES.....GO TO R039

5. NO

DK

RF

R035 BRANCHPOINT: IF R DID NOT SELL ANY OTHER REAL ESTATE (R028 NOT 1), GO TO R044

R035

About how much in total was the dollar value of the real estate you sold [since FINANCIAL R's LAST IW MONTH, YEAR/in the last two years]?

[INSTR: DO NOT PROBE DK/RF.]

About how much in total was the dollar value of the real estate you sold [since FINANCIAL R's LAST IW MONTH, YEAR/in the last two years]?

\$\_\_\_\_\_ .00 GO TO R044

DK  
RF

R036-R038

Question text: (Thinking about the total dollar value of the real estate you sold:)

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down  
BREAKPOINTS: \$50,000, **\$200,000**, \$500,000  
ENTRY POINT: \$200,000

Question text: Thinking about the total dollar value of the real estate you sold:

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down  
BREAKPOINTS: \$50,000, **\$200,000**, \$500,000  
ENTRY POINT: \$200,000

R039 BRANCHPOINT: GO TO R044

R039

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

- 1. BOUGHT MORE THAN SOLD
- 2. BOUGHT LESS THAN SOLD
- 3. BOUGHT AND SOLD ABOUT EQUAL AMOUNTS.....GO TO R044
- DK.....GO TO R044
- RF.....GO TO R044

R040

Roughly, about how much [more/less] did you buy than you sold?

[INSTR: DO NOT PROBE DK/RF.]

Roughly, about how much [more/less] did you buy than you sold?

\$\_\_\_\_\_ .00 GO TO R044

DK  
RF

R041-R043

Question text: (Thinking about how much [more/less] you bought than you sold:)

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

BREAKPOINTS: \$50,000, **\$200,000**, \$500,000

ENTRY POINT: \$200,000

Question text: Thinking about how much [more/less] you bought than you sold:

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

BREAKPOINTS: \$50,000, **\$200,000**, \$500,000

ENTRY POINT: \$200,000

R044

[Since FINANCIAL R's LAST IW MONTH, YEAR/In the last two years], did you [or your [husband/wife/partner]] make any major additions or home improvements to any real estate properties that you owned, other than your principal residence or second home?

[INSTR: DO NOT COUNT GENERAL MAINTENANCE OR UPKEEP.]

1. YES

5. NO.....GO TO R049 BRANCHPOINT

DK.....GO TO R049 BRANCHPOINT

RF.....GO TO R049 BRANCHPOINT

R045

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

[INSTR: DO NOT PROBE DK/RF.]

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

\$\_\_\_\_\_ .00 GO TO R049 BRANCHPOINT

DK

RF

R046-R048

Question text: (Thinking about the dollar cost of these additions and improvements:)

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

BREAKPOINTS: \$2,000, **\$10,000**, \$50,000

ENTRY POINT: \$10,000

Question text: Thinking about the dollar cost of these additions and improvements:

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

BREAKPOINTS: \$2,000, **\$10,000**, \$50,000

ENTRY POINT: \$10,000

R049 BRANCHPOINT: IF R DID NOT REPORT OWNING {ALL OR PART} OF A BUSINESS {AT R's LAST IW (X086 NOT 1) and IN THIS IW (Q147 {NOT 1 and NOT 2})}, GO TO R061  
BRANCHPOINT

R049

[Since FINANCIAL R's LAST IW MONTH, YEAR/In the last two years], have you [or your [husband/wife/partner]] put personal funds into a privately held business, professional practice, partnership or farm that you own or share ownership in?

1. YES

5. NO.....GO TO R054

DK.....GO TO R054

RF.....GO TO R054

R050

Altogether, about how much new money did you [or your partner/husband/wife] put into that, including any funds that you borrowed?

[INSTR: DO NOT PROBE DK/RF.]

Altogether, about how much new money did you [or your partner/husband/wife] put into that, including any funds that you borrowed?

\$\_\_\_\_\_ .00 GO TO R054

DK

RF

R051-R053

Question text: (Thinking about how much new money you [or your partner/husband/wife] put into that:)

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

BREAKPOINTS: \$5,000, **\$50,000**, \$500,000

ENTRY POINT: \$50,000

Question text: Thinking about how much new money you [or your partner/husband/wife] put into that:

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

BREAKPOINTS: \$5,000, **\$50,000**, \$500,000

ENTRY POINT: \$50,000

R054

[Since FINANCIAL R's LAST IW MONTH, YEAR/In the last two years], have you [or your [husband/wife/partner]] sold part or all of any interest in a privately held business, professional practice, partnership or farm?

1. YES

5. NO.....GO TO R061 BRANCHPOINT

DK.....GO TO R061 BRANCHPOINT

RF.....GO TO R061 BRANCHPOINT

R055

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

[INSTR: WE WANT THE PRICE THE BUYER PAID.]

[INSTR: DO NOT PROBE DK/RF.]

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

[INSTR: WE WANT THE PRICE THE BUYER PAID.]

\$\_\_\_\_\_ .00 GO TO R060

DK

RF

R056-R058

Question text: (Thinking about how much you [or your partner/husband/wife] sold your interest for:)

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

BREAKPOINTS: \$10,000, **\$100,000**, \$1,000,000

ENTRY POINT: \$100,000

Question text: Thinking about how much you [or your partner/husband/wife] sold your interest for:

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

BREAKPOINTS: \$10,000, **\$100,000**, \$1,000,000

ENTRY POINT: \$100,000

R060

In what year did you sell that?

[INSTR: MOST RECENT SALE, IF MORE THAN ONE.]

In what year did you sell that?

[INSTR: PLEASE REPORT THE MOST RECENT SALE, IF THERE WAS MORE THAN ONE.]

YEAR\_\_\_\_\_

DK.....GO TO R061 BRANCHPOINT

RF.....GO TO R061 BRANCHPOINT

R059 BRANCHPOINT: IF YEAR AT R060 WAS MORE THAN 2 YEARS AGO, GO TO R061 BRANCHPOINT

R059

What month was that?

[drop down]

- 01. JAN
- 02. FEB
- 03. MAR
- 04. APR
- 05. MAY
- 06. JUN
- 07. JUL
- 08. AUG
- 09. SEP
- 10. OCT
- 11. NOV
- 12. DEC
- DK
- RF

R061 BRANCHPOINT: IF R DID NOT REPORT OWNING {STOCKS OR STOCK MUTUAL FUNDS} {AT R's LAST IW (X087 NOT 1) and IN THIS IW (Q316 NOT 1)}, GO TO R077 BRANCHPOINT

R061

Not counting any IRAs, Keoghs or pension accounts, [since FINANCIAL R's LAST IW MONTH, YEAR/in the last two years], have you [or your [husband/wife/ partner]] bought any stock, or put money into stock mutual funds, including any automatic reinvestments?

- 1. YES
- 5. NO.....GO TO R072
- DK.....GO TO R072
- RF.....GO TO R072

R062

Did you [or your partner |husband/wife] also sell or cash in any such assets?

- 1. YES
- 5. NO.....GO TO R068
- DK.....GO TO R068
- RF.....GO TO R068

R063

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

- 1. PUT MONEY IN
- 2. TAKE MONEY OUT
- 3. PUT IN ABOUT AS MUCH AS TOOK OUT.....GO TO R077 BRANCHPOINT
- DK.....GO TO R077 BRANCHPOINT
- RF.....GO TO R077 BRANCHPOINT

R064

About how much more did you [put in than you took out/take out than you put in]?

[INSTR: DO NOT PROBE DK/RF.]

About how much more did you [put in than you took out/take out than you put in]?

\$\_\_\_\_\_ .00 GO TO R077 BRANCHPOINT

DK

RF

R065-R067

Question text: (Thinking about how much more you [put in than you took out/took out than you put in]:)

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

BREAKPOINTS: \$2,500, **\$10,000**, \$50,000

ENTRY POINT: \$10,000

Question text: Thinking about how much more you [put in than you took out/took out than you put in]:

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

BREAKPOINTS: \$2,500, **\$10,000**, \$50,000

ENTRY POINT: \$10,000

R068 BRANCHPOINT: GO TO R077 BRANCHPOINT

R068

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

[INSTR: DO NOT PROBE DK/RF.]

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

\$\_\_\_\_\_ .00 GO TO R077 BRANCHPOINT

DK

RF

R069-R071



Question text: (Thinking about how much money (including any automatic reinvestment) you [or your partner/husband/wife] put into that:)

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

BREAKPOINTS: \$5,000, **\$25,000**, \$100,000

ENTRY POINT: \$25,000

Question text: Thinking about how much money (including any automatic reinvestment) you [or your partner/husband/wife] put into that:

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

BREAKPOINTS: \$5,000, **\$25,000**, \$100,000

ENTRY POINT: \$25,000

R072 BRANCHPOINT: GO TO R077 BRANCHPOINT

R072

[Since FINANCIAL R's LAST IW MONTH, YEAR/In the last two years], have you [or your [husband/wife/partner]] sold any shares of stock in publicly held corporations or taken money out of any mutual funds, managed investment accounts or trusts?

1. YES

5. NO.....GO TO R077 BRANCHPOINT

DK.....GO TO R077 BRANCHPOINT

RF.....GO TO R077 BRANCHPOINT

R073

Altogether, how much money did you [or your partner/husband/wife] get from that?

[INSTR: DO NOT PROBE DK/RF.]

Altogether, how much money did you [or your partner/husband/wife] get from that?

\$\_\_\_\_\_ .00 GO TO R077 BRANCHPOINT

DK

RF

R074-R076

Question text: (Thinking about how much money you [or your partner/husband/wife] got from that:)

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

BREAKPOINTS: \$5,000, **\$25,000**, \$100,000

ENTRY POINT: \$25,000

Question text: Thinking about how much money you [or your partner/husband/wife] got from that:

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

BREAKPOINTS: \$5,000, **\$25,000**, \$100,000

ENTRY POINT: \$25,000

R077 BRANCHPOINT: IF R DID NOT REPORT OWNING A HOME AT R's LAST IW (X079 NOT 1) or R WAS ASKED ABOUT THE VALUE OF A {MAIN OR SECOND} HOME IN THIS IW ({H016 or H020 or H166} NOT EMPTY), GO TO R083 BRANCHPOINT

IF R DID NOT REPORT THAT S/HE DID NOT {BUY OR SELL} A {MAIN OR SECOND} HOME SINCE R's LAST IW (R002 NOT 5), GO TO R081 BRANCHPOINT

R077

Our records show that you [and your [husband/wife/partner]] owned a home in [FINANCIAL R's LAST IW MONTH, YEAR/the last two years] that you do not now own and did not sell.

What happened to that home -- did you give it to someone, are our records incorrect, or what?

1. GAVE TO SOMEONE
2. RECORDS INCORRECT.....GO TO R081 BRANCHPOINT
7. OTHER (SPECIFY) R078\_\_\_\_\_ GO TO R081 BRANCHPOINT
- DK.....GO TO R081 BRANCHPOINT
- RF.....GO TO R081 BRANCHPOINT

R079M

Who did you [or your partner|husband/wife] give the house to, (that is what is their relationship to you)?

[INSTR: SELECT ALL THAT APPLY.]

2. CHILD, CHILD-IN-LAW , OR GRANDCHILD
3. OTHER RELATIVE.....GO TO R081 BRANCHPOINT
4. SOMEONE ELSE (NOT A RELATIVE).....GO TO R081 BRANCHPOINT
- DK.....GO TO R081 BRANCHPOINT
- RF.....GO TO R081 BRANCHPOINT

Who did you [or your partner |husband/wife] give the house to, that is what is their relationship to you?

[INSTR: SELECT ALL THAT APPLY.]

- 2. CHILD, CHILD-IN-LAW , OR GRANDCHILD
- 3. OTHER RELATIVE.....GO TO R081 BRANCHPOINT
- 4. SOMEONE ELSE (NOT A RELATIVE).....GO TO R081 BRANCHPOINT
- DK.....GO TO R081 BRANCHPOINT
- RF.....GO TO R081 BRANCHPOINT

R103

(Which child is that?)

[INSTR SELECT ALL THAT APPLY.]

IF GRANDCHILD:

Which child of yours [or your partner/husband/wife] is the parent of that grandchild?

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

3. TO 52. CHILD NAME(S)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

92. DECEASED CHILD

93. ALL CHILDREN

DK

RF

Which child is this? If this is a grandchild, who is their parent?

[INSTR: SELECT ALL THAT APPLY.]

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

3. TO 52. CHILD NAME(S)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

92. DECEASED CHILD

93. ALL CHILDREN

DK

RF

R081 BRANCHPOINT: IF R SOLD BUT DID NOT BUY A HOME (R003 NOT 2), GO TO R083 BRANCHPOINT

R081

Our records show that you owned a home in [FINANCIAL R's LAST IW MONTH, YEAR/the last two years] that you have since sold.

What did you decide to do with the proceeds from selling the house -- did you invest the money, did you give it to someone, are our records incorrect, or what?

- 1. INVESTED THE MONEY
  - 2. GAVE PROCEEDS TO SOMEONE
  - 3. RECORDS INCORRECT
  - 7. OTHER (SPECIFY) R082 \_\_\_\_\_
- DK  
RF

R083 BRANCPPOINT: IF NO ONE MOVED {IN OR OUT} OF THE HH SINCE R's LAST IW (A102=0), GO TO R101 (R ASSIST)

R083

Sometimes changes in a family's savings or assets are due to people joining or leaving the family.

Was there anyone living with you [and your [husband/wife/partner]] in [FINANCIAL R's LAST IW MONTH, YEAR/the last two years] who doesn't live with you now and who took \$5,000 or more in assets or debts away with them?

- 1. YES, TOOK ASSETS
  - 2. YES, TOOK DEBTS.....GO TO R088
  - 3. BOTH
  - 5. NO.....GO TO R092
- DK.....GO TO R092  
RF.....GO TO R092

R084

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

[INSTR: DO NOT PROBE DK/RF.]

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

\$ \_\_\_\_\_ .00 GO TO R088 BRANCPPOINT

- DK
- RF

R085-R087

Question text: (Thinking about the total dollar value of assets that were removed that way:)

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

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

ENTRY POINT: \$25,000

Question text: Thinking about the total dollar value of assets that were removed that way:

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

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

ENTRY POINT: \$25,000

R088 BRANCHPOINT: IF R DID NOT SAY THAT DEBTS WERE REMOVED FROM THE HH BY A HH MEMBER LEAVING (R083 {NOT 2 and NOT 3}), GO TO R092

R088

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

[INSTR: DO NOT PROBE DK/RF.]

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

\$\_\_\_\_\_ .00 GO TO R092

DK

RF

R089-R091

Question text: (Thinking about the total dollar value of debts that were removed that way:)

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

BREAKPOINTS: \$5,000, **\$10,000**, \$25,000

ENTRY POINT: \$10,000

Question text: Thinking about the total dollar value of debts that were removed that way:

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

BREAKPOINTS: \$5,000, **\$10,000**, \$25,000

ENTRY POINT: \$10,000

R092\_

Is there anyone in your family living with you [and your [husband/wife/partner]] now who has joined the family [since FINANCIAL R's LAST IW MONTH, YEAR/in the last two years] and who had \$5,000 or more in assets or debts at the time they joined the family?

- 1. YES, HAD ASSETS
- 2. YES, HAD DEBTS.....GO TO R097
- 3. HAD BOTH
- 5. NO.....GO TO R101 (R ASSIST)
- DK.....GO TO R101 (R ASSIST)
- RF.....GO TO R101 (R ASSIST)

R093\_

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

[INSTR: DO NOT PROBE DK/RF.]

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

\$ \_\_\_\_\_ .00 GO TO R097 BRANCHPOINT

DK  
RF

R094-R096

Question text: (Thinking about the total dollar value of assets that were brought into the family in that way:)

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

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

ENTRY POINT: \$25,000

Question text: Thinking about the total dollar value of assets that were brought into the family in that way:

Did it amount to a total of less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

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

ENTRY POINT: \$25,000

R097 BRANCHPOINT: IF R DID NOT SAY THAT DEBTS WERE ADDED TO THE HH BY A NEW HH MEMBER MOVING IN (R092 {NOT 2 and NOT 3}), GO TO R101 (R ASSIST)

R097

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

[INSTR: DO NOT PROBE DK/RF.]

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

\$ \_\_\_\_\_ .00 GO TO R101 (R ASSIST)

DK

RF

R098-R100

Question text: (Thinking about the total dollar value of debts that were brought into the family in that way:)

Did it amount to a total of less than \$ \_\_\_\_\_ , more than \$ \_\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

BREAKPOINTS: \$5,000, **\$10,000**, \$25,000

ENTRY POINT: \$10,000

Question text: Thinking about the total dollar value of debts that were brought into the family in that way:

Did it amount to a total of less than \$ \_\_\_\_\_ , more than \$ \_\_\_\_\_ , or what?

PROCEDURE: 1Up1Down

BREAKPOINTS: \$5,000, **\$10,000**, \$25,000

ENTRY POINT: \$10,000

R101 BRANCHPOINT: IF THIS IS A CAWI IW, GO TO END OF SECTION R

R101\_Assis

tR

[INSTR: HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN SECTION R - ASSET CHANGE?]

1. NEVER
2. A FEW TIMES
3. MOST OR ALL OF THE TIME
4. THE SECTION WAS DONE BY A PROXY REPORTER
5. NO QUESTIONS WERE ASKED

**GO TO SECTION T**