

1986 SURVEY OF CONSUMER FINANCES

GENERAL CODING INSTRUCTIONS

1. Rounding rules: For ages, round fractional years down. For other ranges, code the midpoint, rounding to the odd if necessary.
2. "PER" time period code: Code "DK" as 9; code 8 is used for NO REGULAR PAYMENTS.
3. For all Dollar fields except Income (J1,3,5), use code 9 999 997 for an answer by R referring to a small but unspecified amount (for example, "just a bit"; "only a little"; "not very much").
4. When coding Dates, if R gives a season reference, but can't give exact month, use the following convention:

 "Winter" = 02
 "Spring" = 05
 "Summer" = 08
 "Fall" = 11

1986 SURVEY OF CONSUMER FINANCES

(Facesheet; A0 - A7a)

VAR #

1

CASE ID 86

1001 - 4000 1986 Interview cases
5001 - 8000 1986 Non-interview cases

0000 Inap: Non-reinterview sample cases

2

COVERSHEET ID 86

Five digits. First digit is same as SAMPLE TYPE (see V4). Last four digits are the 1983 SCF Case ID for this respondent.

3

1983 ID

1 - 5000

4

SAMPLE TYPE

-
1. Cross-section respondent
 2. High Income respondent
 3. Cross-section mover-out
 4. High income mover-out
 5. Cross-section not selected for reinterview
 6. Cross-section excluded from reinterview sample

5

CS RESPONDENT SEX

-
1. Male
 2. Female

 0. Inap.

VAR #

6

CS RESPONDENT AGE

15 - 95 Years

99 NA

00 Inap.

7

CS SPOUSE SEX

1. Male

2. Female

0. Inap

8

CS SPOUSE AGE

17 - 95 Years

99 NA

00 Inap.

9

SPOUSE COMPARISON 83//86

1. Spouse from 1983 listed on coversheet label;
spouse listed in 1986 household listing.

2. Spouse from 1983 listed on coversheet label;
no spouse listed in 1986 household listing.

3. No spouse from 1983 listed on coversheet
label; spouse listed in 1986 household listing.

4. No spouse from 1983 listed on coversheet
label; no spouse listed in 1986 household listing.

0. Inap

VAR #

10

SAME SPOUSE?

If spouse present in both 1983 and 1986 (see V9), is this the same person?

- 1. YES
- 5. NO

- 0. Inap

11

MOVER-OUT SAMPLE TYPE 86

- 1. Cross Section Mover-Out, Complete Interview
- 2. High Income Mover-Out, Complete Interview
- 3. Cross Section Mover-Out, No Interview
- 4. High Income Mover-Out, No Interview

- 0. Inap: No mover-out

12

MOVER-OUT LINK 1983 ID

1983 SCF Case ID for this mover out. (Not all mover-outs gave interviews in 1986; see V11.)

- 1 - 5000 1983 CASE ID

- 0. Inap

13

MOVER-OUT FORM #

assigned for field office for each mover-out who did not give an interview in 1986.

- 1 - 4000

- 0. Inap

VAR #

14

MOVER-OUT RESULT CODE

- 1. Mover-out was found and completed interview
- 5. Mover-out was found but refused interview
- 75. Mover-out was not found
- 77. Mover-out was deceased or institutionalized

- 0. Inap

15

INTERVIEWER ID 86

of interviewer who completed interview

194 - 903

0. Inap

16

DATE INTERVIEW BEGAN--MONTH

6 - 9

0. Inap

17

DATE INTERVIEW BEGAN--DAY

1 - 31

0. Inap

18

DATE INTERVIEW ENDED--MONTH

6 - 9

0. Inap

19

DATE INTERVIEW ENDED--DAY

1 - 31

0. Inap

VAR #

20

DATE INT TIME OF DAY

 Time when last call was made.

1. Weekdays 9:00 am - 12:59 pm
2. Weekdays 1:00 pm - 5:59 pm
3. Weekdays 6:00 pm - 12:00 midnight
4. Saturdays 10:00 am - 5:59 pm
5. Saturdays 6:00 pm - 12:00 midnight
6. Sundays 12:00 noon - 5:59 pm
7. Sundays 6:00 pm - 12:00 midnight

9. NA
0. Inap

21

INT RESULT CODE

-
1. Complete interview
 5. Partial interview
 50. Found but refused interview
 75. Could not be located
 77. Deceased or institutionalized
 78. Respondent physical inability
 79. Language problem
 80. Overseas entire study period
 90. Household not selected for reinterview
 95. Household excluded

22

INTERVIEW LENGTH

 # of minutes it took to do the interview

999. NA
000. Inap

23

EDIT LENGTH

 # of minutes it took to edit the interview

999. NA
000. Inap

VAR #

24

RESIDENCE CHANGE

-
1. Change in primary residence since 1983
 5. No change in primary residence

 0. Inap.

25

STATE

-
1. Alabama
 2. Alaska
 3. Arizona
 4. Arkansas
 5. California
 6. Connecticut
 7. Colorado
 8. District of Columbia
 9. Delaware
 10. Florida
 11. Georgia
 12. Hawaii
 13. Idaho
 14. Illinois
 15. Indiana
 16. Iowa
 17. Kansas
 18. Kentucky
 19. Louisiana
 20. Maine
 21. Maryland
 22. Massachusetts
 23. Michigan
 24. Minnesota
 25. Mississippi
 26. Missouri
 27. Montana
 28. Nebraska
 29. Nevada
 30. New Hampshire
 31. New Jersey
 32. New Mexico
 33. New York
 34. North Carolina
 35. North Dakota
 36. Ohio
 37. Oklahoma
 38. Oregon
 39. Pennsylvania
 40. Rhode Island

VAR #

- 41. South Carolina
- 42. South Dakota
- 43. Tennessee
- 44. Texas
- 45. Utah
- 46. Vermont
- 47. Virginia
- 48. Washington
- 49. West Virginia
- 50. Wisconsin
- 51. Wyoming

- 00. Inap, did not move, high income sample

26

REGION

-
- 1. Northeast
 - 2. North Central
 - 3. South
 - 4. West

 - 0. Inap, did not move, high income sample

27

STATE FIPS CODE

-
- 00. Inap, did not move, high income sample

28

COUNTY FIPS CODE

-
- 000. Inap, did not move, high income sample

29

ZIP/COUNTY ASSIGNMENT

-
- 1. Assignment of FIPS code to major county within the ZIP code area.
 - 5. No assignment--the entire ZIP code was within a single county

 - 0. Inap, did not move, high income sample

VAR #

91 83R CROSS SETION COMPOSITE WEIGHT

Revised 1983 cross section weights.
0. Inap, high income sample, 159 missing data cases.

92 83R HIGH INCOME COMPOSITE WEIGHT

Revised 1983 weights for the high income sample.
0. Inap, cross section sample

93 83R COMPOSITE WEIGHT

Revised 1983 composite weights for full sample.
0. Inap, 159 missing data cases.

94 86 CROSS SETION COMPOSITE WEIGHT (83 BASE)

1986 cross section weights for reinterview sample,
post stratified by 1983 population counts.
0. Inap, high income sample, no reinterview

95 86 HIGH INCOME COMPOSITE WEIGHT (83 BASE)

1986 weights for the high income reinterview sample,
post stratified by 1983 population counts.
0. Inap, cross section sample, no reinterview

96 86 COMPOSITE WEIGHT (83 BASE)

1986 composite weights for full reinterview sample,
post stratified by 1983 population counts.
0. Inap, no reinterview

VAR #

97

86 CROSS SECTION COMPOSITE WEIGHT (86 BASE)

1986 cross section weights for reinterview sample,
post stratified by 1986 population counts.

0. Inap, high income sample, no reinterview

98

86 HIGH INCOME COMPOSITE WEIGHT (86 BASE)

1986 weights for the high income reinterview sample,
post stratified by 1986 population counts.

0. Inap, cross section sample, no reinterview

99

86 COMPOSITE WEIGHT (86 BASE)

1986 composite weights for full reinterview sample,
post stratified by 1986 population counts.

0. Inap, no reinterview

100

A0. TIME BEGIN SECTION A

Hours and minutes, 8 am - 12 midnight in military
time:

8 am	0800-0859
9 am	0900-0959
10 am	1000-1059
11 am	1100-1159
12 noon	1200-1259
1 pm	1300-1359
2 pm	1400-1459
3 pm	1500-1559
4 pm	1600-1659
5 pm	1700-1759
6 pm	1800-1859
7 pm	1900-1959
8 pm	2000-2059
9 pm	2100-2159
10 pm	2200-2259
11 pm	2300-2359
12 midnight	2400

9999. NA

0000. Inap

VAR #

101

A1. Not including any children that currently live with you, do you (or your husband/wife) have any other children that are still living, including children from previous marriages and adopted children?

1. YES

0 in 102-111

5. NO

9. NA

102

Ala. How many children do you (and your husband/wife) have that do not live with you at the present time?

Code # CHILDREN LIVING ELSEWHERE (01-20)

0 in 104-111

01. One

0 in 105-111

02. Two

0 in 106-111

03. Three

0 in 107-111

04. Four

0 in 108-111

05. Five

0 in 109-111

06. Six

0 in 110-111

07. Seven

0 in 111

08. Eight

98. DK

99. NA

00. Inap, 5 or 9 in 101

VAR #

114

A2b. What (is her/is his/are their) current
age(s)? -- MOTHER

Code age (32-95)

USE SAME CODE FOR V115

98. DK

99. NA

00. Inap, 1-4 in 112; 4 in 113

115

A2b. What (is her/is his/are their) current
age(s)? -- FATHER

116

A3. In what month and year were you last (separated/
divorced/widowed)? -- MONTH

Code Month (01-12)

98. DK

99. NA

00. Inap, 1, 5 or 9 in 112

117

A3. In what month and year were you last (separated/
divorced/widowed)? -- YEAR

Code Year (1910-1986)

9998. DK

9999. NA

0000. Inap, 1, 5 or 9 in 112

VAR #

103(#1) Alb. What (is his or her/are their) current age(s)?
 104(#2) _____
 105(#3) Code age (01-95)
 106(#4)
 107(#5) 01. One year or less
 108(#6)
 109(#7) 95. Ninety five years or more
 110(#8)
 111(#9) 98. DK
 99. NA
 00. Inap, 5 or 9 in 101; no further persons listed

112 A2. Are you currently married, separated, divorced, widowed or have you never been married?

0 in 113-117 ——— 1. MARRIED

0 in 113-115 ——— 2. SEPARATED
 ——— 3. DIVORCED
 ——— 4. WIDOWED

0 in 116-141, 201-224, 301-333, 401-412 ——— 5. NEVER MARRIED
 ——— 9. NA

113 A2a. Is one or both of your parents still living? (Is that your mother or father?)

0 in 115 ——— 1. MOTHER LIVING

0 in 114 ——— 2. FATHER LIVING
 ——— 3. BOTH LIVING
 ——— 4. NO, NEITHER LIVING

0 in 114-115 ——— 8. DK
 ——— 9. NA

0. Inap, 1-4 in 112

VAR #

122(A) A6a. In what month and year did your (first/next) marriage
128(B) begin? -- MONTH
134(C)

Code Month (01-12)

98. DK
99. NA

00. Inap, 5 or 9 in 112; 1 in 120; no further
marriages

123(A) A6a. In what month and year did your (first/next) marriage
129(B) begin? -- YEAR
135(C)

Code Year (1910-1986)

9998. DK
9999. NA

0000. Inap, 5 or 9 in 112; 1 in 120; no further
marriages

124(A) A6b. In what month and year did that marriage end? -- MONTH
130(B)
136(C)

Use same code as for A6a--MONTH

125(A) A6b. In what month and year did that marriage end? -- YEAR
131(B)
137(C)

Use same code as for A6a--YEAR

126(A) A6c. Did that marriage end in divorce or were you widowed?
132(B)
138(C)

3. DIVORCED
4. WIDOWED

9. NA

0. Inap, 5 or 9 in 112; 1 in 120; no further
marriages

VAR #

118

A4. In what month and year were you last married? -- MONTH

If R gives same dates as for A3, code NA for A4 (V118,119).

Code Month (01-12)

98. DK

99. NA

00. Inap, 5 or 9 in 112

119

A4. In what month and year were you last married? -- YEAR

Code Year (1910-1986)

9998. DK

9999. NA

0000. Inap, 5 or 9 in 112

120

A5. (Is/Was) this your first marriage, or (have/had) you been married before?

0 in 121-138

1. FIRST MARRIAGE

5. MARRIED BEFORE

9. NA

0. Inap, 5 or 9 in 112

121

A6. Altogether, how many times have you been married, including your current marriage?

0 in 128-138

2. TWO

0 in 134-138

3. THREE

4. FOUR OR MORE

9. NA

0. Inap, 5 or 9 in 112; 1 in 120

VAR #

127(A)
133(B)

A6d. INTERVIEWER CHECKPOINT

- 1. TWO MARRIAGES (A);
THREE MARRIAGES (B)
- 5. THREE OR MORE MARRIAGES (A);
FOUR OR MORE MARRIAGES (B)
- 9. NA
- 0. Inap, 5 or 9 in 112

139

A7. Is one or both of your parents still living? (Is that your mother or father?)

0 in 141

1. MOTHER LIVING

0 in 140

2. FATHER LIVING

3. BOTH LIVING

0 in 140-141

4. NO, NEITHER LIVING

8. DK

9. NA

0. Inap, 5 or 9 in 112

140

A7a. What (is her/is his/are their) current age(s)? -- MOTHER

Code age (032-106)

USE SAME CODE FOR V141

998. DK

999. NA

000. Inap, 5 or 9 in 112; 4 in 139

141

A7a. What (is her/is his/are their) current age(s)? -- FATHER

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(A8 - A12)

VAR #

201 A8. INTERVIEWER CHECKPOINT

1. R CURRENTLY MARRIED OR SEPARATED ("1" OR "2" CHECKED AT A2)

0 in 202-220

2. ALL OTHERS

0. Inap, 5 or 9 in 112

202 A9. Was your (current) (husband/wife) married before?

1. YES

0 in 203-220

5. NO

8. DK

9. NA

0. Inap, 5 or 9 in 112; 2 in 201

203 A10. Altogether, how many times has your (husband/wife) been married, including (his/her) current marriage?

0 in 210-220

2. TWO

0 in 216-220

3. THREE

4. FOUR OR MORE

0 in 204-220

8. DK

9. NA

0. Inap, 5 or 9 in 112; 2 in 201; 5, 8-9 in 202

204(A) A10a. In what month and year did your (husband's/wife's)
210(B) (first/next) marriage begin? -- MONTH
216(C)

Code Month (01-12)

VAR #

98. DK

99. NA

00. Inap, 5 or 9 in 112; 2 in 201; 5, 8-9 in 202;
no further marriages205(A)
211(B)
217(C)A10a. In what month and year did your (husband's/wife's)
(first/next) marriage begin? -- YEAR

Code Year (1910-1986)

9998. DK

9999. NA

0000. Inap, 5 or 9 in 112; 2 in 201; 5, 8-9 in 202;
no further marriages206(A)
212(B)
218(C)

A10b. In what month and year did that marriage end? -- MONTH

Use same code as for A10a--MONTH207(A)
213(B)
219(C)

A10b. In what month and year did that marriage end? -- YEAR

Use same code as for A10a--YEAR208(A)
214(B)
220(C)A10c. Did that marriage end in divorce or was (he/she)
widowed?

3. DIVORCED

4. WIDOWED

9. NA

0. Inap, 5 or 9 in 112; 2 in 201; 5, 8-9 in 202;
no further marriages

VAR #

209(A)
215(B)

A10d. INTERVIEWER CHECKPOINT

- 1. TWO MARRIAGES (A);
THREE MARRIAGES (B)
- 5. THREE OR MORE MARRIAGES (A);
FOUR OR MORE MARRIAGES (B)
- 9. NA
- 0. Inap, 5 or 9 in 112; 2 in 201; 5, 8-9 in 202;
no further marriages

221

All. Is one or both of your (husband's/wife's) parents still living? (Is that (his/her) mother or father?)

0 in 223

1. MOTHER LIVING

0 in 222

2. FATHER LIVING

3. BOTH LIVING

0 in 222-223

4. NO, NEITHER LIVING

8. DK

9. NA

0. Inap, 5 or 9 in 112

222

Alla. What (is her/is his/are their) current age(s)? -- MOTHER

Code age (032-106)

USE SAME CODE FOR V223

998. DK

999. NA

000. Inap, 5 or 9 in 112; 4, 8-9 in 221

223

Alla. What (is her/is his/are their) current age(s)? -- FATHER

VAR #

224

A12. INTERVIEWER CHECKPOINT

1. R LAST DIVORCED IN 1983 OR LATER

0 in 301-333

2. ALL OTHERS

0. Inap, 5 or 9 in 112

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(A13 - A23a)

VAR #

301

A13. In your (last) divorce, was there a division of financial assets or property?

1. YES

0 in
302

5. NO

8. DK

9. NA

0. Inap, 5 or 9 in 112; 2 in 224

302

A13a. What was the total dollar value of the assets that you kept or received, including your share of the financial assets, the home and other real estate, and any other property that you received?

Code DOLLARS (0 000 001 - 9 999 995)

9 999 996. Zero; nothing

9 999 997. Small but unspecified amount or negative loss amount

9 999 998. DK

9 999 999. NA

0 000 000. Inap, 5 or 9 in 112; 2 in 224; 5, 8 or 9 in 301

VAR #

303

A14. Were you required to pay alimony, were you supposed to receive alimony, or was no alimony involved in the settlement?

0 in 308-313

1. REQUIRED TO PAY ALIMONY

0 in 304-307

2. SUPPOSED TO RECEIVE ALIMONY

0 in
304-313

6. NO ALIMONY INVOLVED

9. NA

0. Inap, 5 or 9 in 112; 2 in 22

304

A14a. What was the dollar amount of alimony you were required to pay? (Was that per month, per year, or what?) -- AMOUNT

Code AMOUNT in DOLLARS (000 001 - 999 995)

999 998. DK

999 999. NA

000 000. Inap, 5 or 9 in 112; 2 in 224; 2, 6 or 9
in 303

305

A14a. What was the dollar amount of alimony you were required to pay? (Was that per month, per year, or what?) -- PER

3. Week

4. 2 weeks

5. Month

6. Year

7. Other

9. NA; DK

0. Inap, 5 or 9 in 112; 2 in 224; 2, 6 or 9 in 303

VAR #

306

A14b. At the time of the settlement, were alimony payments scheduled to last a certain number of years, for life unless your (husband/wife) remarried, or what?

0 in
307

- 1. CERTAIN NUMBER OF YEARS
- 2. FOR LIFE

7. Other

0 in
307

- 8. DK
- 9. NA

0. Inap, 5 or 9 in 112; 2 in 224; 2, 6 or 9 in 303

307

A14c. For how many years were alimony payments scheduled to last?

Code # YEARS (01-25)

- 98. DK
- 99. NA

00. Inap, 5 or 9 in 112; 2 in 224; 2, 6 or 9 in 303;
2 or 7-9 in 306

308

A15. What was the dollar amount of alimony you were supposed to receive? (Was that per month, per year, or what?) -- AMOUNT

Code AMOUNT in DOLLARS (000 001 - 999 995)

- 999 998. DK
- 999 999. NA

000 000. Inap, 5 or 9 in 112; 2 in 224; 1, 6 or 9
in 303

VAR #

309

A15. What was the dollar amount of alimony you were supposed to receive? (Was that per month, per year, or what?) -- PER

-
- 3. Week
 - 4. 2 weeks
 - 5. Month
 - 6. Year
 - 7. Other
 - 8. Total--payment period not given
 - 9. NA; DK
 - 0. Inap, 5 or 9 in 112; 2 in 224; 1, 6 or 9 in 303

310

A16. At the time of the settlement, were alimony payments scheduled to last a certain number of years, for life unless you remarry, or what?

-
- 1. CERTAIN NUMBER OF YEARS
 - 2. FOR LIFE, unless you remarry
 - 7. OTHER (SPECIFY)
 - 3. REDUCED when child reaches 18

0 in
311

0 in
311

- 8. DK
- 9. NA
- 0. Inap, 5 or 9 in 112; 2 in 224; 1, 6 or 9 in 303

311

A16a. For how many years were alimony payments scheduled to last?

Code # YEARS (01-25)

- 98. DK
- 99. NA
- 00. Inap, 5 or 9 in 112; 2 in 224; 1, 6 or 9 in 303;
2, 7-9 in 310

VAR #

312

A16b. Are the alimony payments currently up to date or are some back payments now owed?

0 in 313

1. UP TO DATE

5. BACK PAYMENTS OWED

8. DK

9. NA

0. Inap, 5 or 9 in 112; 2 in 224; 1, 6 or 9 in 303

313

A16c. What is the total dollar amount of alimony that is currently overdue?

Code AMOUNT in DOLLARS (000 001 - 999 995)

999 998. DK

999 999. NA

000 000. Inap, 5 or 9 in 112; 2 in 224; 1, 6 or 9 in 303; 1 in 312

314

A17. Did you receive custody of your children, did your former (husband/wife) receive custody, do you have joint custody, or were there no children involved in the settlement?

1. RESPONDENT

2. SPOUSE

3. JOINT

0 in 315-329

6. NO CHILDREN

9. NA

0. Inap, 5 or 9 in 112; 2 in 224

VAR #

315 A18. Were you required to pay child support, were you supposed to receive child support, or was child support not required in the settlement?

0 in 322-329

1. REQUIRED TO PAY CHILD SUPPORT

0 in 316-321

2. SUPPOSED TO RECEIVE CHILD SUPPORT

0 in
316-329

6. NO CHILD SUPPORT

9. NA

0. Inap, 5 or 9 in 112; 2 in 224

316 A18a. What was the dollar amount of child support you were required to pay? (Was that per month, per year, or what?) -- AMOUNT

Code AMOUNT in DOLLARS (000 001 - 999 995)

999 998. DK

999 999. NA

000 000. Inap, 5 or 9 in 112; 2 in 224; 6 in 314; 2, 6 or 9 in 315

317 A18a. What was the dollar amount of child support you were required to pay? (Was that per month, per year, or what?) -- PER

3. Week

4. 2 weeks

5. Month

6. Year

7. Other

9. NA; DK

0. Inap, 5 or 9 in 112; 2 in 224; 6 in 314; 2, 6 or 9 in 315

VAR #

318

A18b. At the time of the settlement, were child support payments scheduled to last a certain number of years, until your youngest child reached a certain age, or what?

0 in 320-321

1. CERTAIN NUMBER OF YEARS

0 in 319

2. CERTAIN AGE

0 in 319-321

7. OTHER (SPECIFY)

8. DK

9. NA

0. Inap, 5 or 9 in 112; 2 in 224; 6 in 314; 2, 6 or 9 in 315

319

A18c. For how many years were child support payments scheduled to last?

Code # YEARS (01-25)

98. DK

99. NA

00. Inap, 5 or 9 in 112; 2 in 224; 6 in 314; 2, 6 or 9 in 315; 2, 7-9 in 318

320

A18d. How old will your youngest child be when child support payments end?

Code AGE (01-25)

98. DK

99. NA

00. Inap, 5 or 9 in 112; 2 in 224; 6 in 314; 2, 6 or 9 in 315; 1, 7-9 in 318

VAR #

321

A18e. How old was this child when child support payments began?

Code AGE (01-25)

96. Child not yet born when payments began

98. DK

99. NA

00. Inap, 5 or 9 in 112; 2 in 224; 6 in 314; 2, 6 or 9 in 315; 1, 7-9 in 318

322

A19. What was the dollar amount of child support you were supposed to receive? (Was that per month, per year, or what?) -- AMOUNT

Code AMOUNT in DOLLARS (000 001 - 999 995)

999 998. DK

999 999. NA

000 000. Inap, 5 or 9 in 112; 2 in 224; 6 in 314; 1, 6 or 9 in 315

323

A19. What was the dollar amount of child support you were supposed to receive? (Was that per month, per year, or what?) -- PER

3. Week

4. 2 weeks

5. Month

6. Year

7. Other

9. NA; DK

0. Inap, 5 or 9 in 112; 2 in 224; 6 in 314; 1, 6 or 9 in 315

VAR #

324 A20. At the time of the settlement, were child support payments scheduled to last a certain number of years, until your youngest child reached a certain age, or what?

-
- 0 in 326-327 — 1. CERTAIN NUMBER OF YEARS
 - 0 in 325 — 2. CERTAIN AGE
 - 3. Until (youngest) child out of college/leaves home
 - 7. OTHER (SPECIFY)
 - 6. No time period specified
 - 0 in 325-327 — 8. DK
 - 0 in 325-327 — 9. NA
 - 0. Inap; 5 or 9 in 112; 2 in 224; 6 in 314; 1, 6 or 9 in 315

325 A20a. For how many years were child support payments scheduled to last?

Code # YEARS (01-25)

- 98. DK
- 99. NA
- 00. Inap; 5 or 9 in 112; 2 in 224; 6 in 314; 1, 6 or 9 in 315; 2, 6-9 in 324

326 A20b. How old will your youngest child be when child support payments end?

Code AGE (01-25)

- 98. DK
- 99. NA
- 00. Inap, 5 or 9 in 112; 2 in 224; 6 in 314; 1, 6 or 9 in 315; 1, 6-9 in 324

VAR #

327

A20c. How old was this child when child support payments began?

Code AGE (01-25)

96. Child not born yet

98. DK

99. NA

00. Inap, 5 or 9 in 112; 2 in 224; 6 in 314; 1, 6 or 9 in 315; 1, 6-9 in 324

328

A21. Are the child support payments currently up to date or are some back payments now owed?

0 in 329

1. UP TO DATE

5. BACK PAYMENTS OWED

8. DK

9. NA

0. Inap, 5 or 9 in 112; 2 in 224; 6 in 314; 1, 6 or 9 in 315

329

A22. What is the total dollar amount of child support that is currently overdue?

Code AMOUNT in DOLLARS (000 001 - 999 995)

999 998. DK

999 999. NA

000 000. Inap, 5 or 9 in 112; 2 in 224; 6 in 314; 1, 6 or 9 in 315; 1, 8 or 9 in 328

VAR #

330

A23. Are there any financial aspects of your (last) divorce that we have not yet talked about, such as special provisions covering educational and medical expenses, sharing home ownership, claims on future pension benefits, or claims on assets that are to be given or received in the future?

1. YES

5. NO

8. DK

9. NA

0 in 331-333

0. Inap, 5 or 9 in 112; 2 in 224

VAR #

331
332
333

A23a. What are they?

01. Pension rights; part of pension
02. Medical expenses; health insurance
03. Children's college/education expenses
04. Life insurance (ex-spouse/child beneficiary)
05. Split use of/rent from/sale proceeds
from house/property
06. Ex-spouse still owes money (no reference to
condition of divorce under which this
money is owed)
07. Division of community property--not
further specified
08. Investments; IRA's
09. Support payments dependent on salary
10. Divide proceeds from lawsuit
11. Insurance--NA what kind

97. Other

98. DK

99. NA

00. Inap, 5 or 9 in 112; 2 in 224; 5, 8-9 in 330

1986 SURVEY OF CONSUMER FINANCES

(A24 - A32)

VAR #

401

A24. INTERVIEWER CHECKPOINT

0 in 402-412

- 1. R LAST WIDOWED IN 1983 OR LATER
(SEE A2 AND A3 OR A6b AND A6c)
- 2. ALL OTHERS
- 0. Inap, 5 or 9 in 112

402

A25. How old was your (husband/wife) when (he/she) died?

Code AGE (17-95)

- 98. DK
- 99. NA
- 00. Inap, 5 or 9 in 112; 2 in 401

403

A26. Did your (husband/wife) have a will?

0 in
404-407

- 1. YES
- 5. NO
- 8. DK
- 9. NA
- 0. Inap, 5 or 9 in 112; 2 in 401

VAR #

404 A27. Did your (husband/wife) leave any money or property to a church, university, medical, or other charitable organization, as part of (his/her) will?

1. YES

0 in
405

5. NO

8. DK

9. NA

0. Inap, 5 or 9 in 112; 2 in 401; 5, 8-9 in 403

405 A27a. What was the total dollar amount of these gifts?

Code DOLLAR AMOUNT (0 000 001-9 999 995)

9 999 998. DK

9 999 999. NA

0 000 000. Inap, 5 or 9 in 112; 2 in 401; 5, 8-9 in 403 or 404

406 A28. As part of (his/her) will, did your (husband/wife) leave any money or property to anyone who does not live there with you, such as adult children, other family members, or friends?

1. YES

0 in
407

5. NO

8. DK

9. NA

0. Inap, 5 or 9 in 112; 2 in 401; 5, 8-9 in 403

VAR #

407 A28a. What was the total dollar amount that was left to other family members and friends?

Code DOLLAR AMOUNT (0 000 001-9 999 995)

9 999 998. DK

9 999 999. NA

0 000 000. Inap, 5 or 9 in 112; 2 in 401; 5, 8-9 in 403 or 406

408 A29. Aside from any Social Security benefits, did your (husband/wife) receive, or did (he/she) expect to receive, any benefit payments from an employer sponsored retirement or pension plan?

1. YES

0 in
409-412

5. NO

8. DK

9. NA

0. Inap, 5 or 9 in 112; 2 in 401

409 A30. Do you now receive or do you expect to receive benefit payments from this retirement or pension plan?

1. YES

0 in
410

5. NO

8. DK

9. NA

0. Inap, 5 or 9 in 112; 2 in 401; 5, 8-9 in 408

VAR #

410 A30a. Once they begin, would these payments last for the rest of your life or for a limited period of time?

0 in 411-412

-
1. REST OF LIFE
 2. LIMITED TIME PERIOD
 8. DK
 9. NA
 0. Inap, 5 or 9 in 112; 2 in 401; 5, 8-9 in 408 or 409

411 A31. Did your (husband's/wife's) employer offer an option that would make regular benefit payments to surviving spouses for the rest of their lives?

0 in 412

-
1. YES
 5. NO
 8. DON'T KNOW
 9. NA
 0. Inap, 5 or 9 in 112; 2 in 401; 5, 8-9 in 408; 1 in 410

412 A32. Did you decide jointly with your (husband/wife) not to have this option, or was this something your (husband/wife) decided (himself/herself)?

-
1. JOINT DECISION
 2. HUSBAND/WIFE DECIDED
 8. DK
 9. NA
 0. Inap, 5 or 9 in 112; 2 in 401; 5, 8-9 in 408; 1 in 410; 5, 8 or 9 in 411

1986 SURVEY OF CONSUMER FINANCES

(B1 - B27c)

VAR #

501

B1, B1c. SUMMARY OF OCCUPATION STATUS AND WORKING NOW

Code Occupation Status Summary precoded in green by editors

- 11. Worker only
- 13. Worker + retired/disabled
- 14. Worker + student
- 15. Worker + housewife
- 16. Worker + unemployed
- 17. Worker + unemployed + student
- 18. Working + temp. laid off

- 20. Temporarily laid off
- 21. Temporarily laid off + student
- 22. Temporarily laid off + housewife

- 30. Unemployed and looking for work
- 31. Unemployed and looking for work + retired; disabled
- 32. Unemployed and looking for work and retired; disabled + housewife
- 33. Unemployed and looking for work + housewife

- 50. Retired/disabled--not working at all now
- 51. Retired/disabled--and housewife

- 70. Student--not working at all now

- 80. Housewife/other not in labor force--not working at all now

- 97. Other (incl. other combination)
- 99. NA

VAR #

502

B1. We are interested in your present job status. Are you working now, temporarily laid off, unemployed and looking for work, disabled and unable to work, retired, a student, (a housewife,) or what? (CHECK ALL THAT APPLY, e.g., RETIRED AND WORKING NOW--ASK ALL FOLLOW-UP QUESTIONS)

0 in 503-512

- 01. WORKING NOW; ON STRIKE; SICK LEAVE
- 02. TEMPORARILY LAID OFF; ON EXTENDED LEAVE
- 21. Combination Box 1 and Box 2 checked
- 22. Other combinations include 2

0 in
503-505

- 03. UNEMPLOYED AND LOOKING FOR WORK
- 04. RETIRED; DISABLED
- 05. STUDENT
- 06. HOUSEWIFE
- 07. OTHER (including voluntarily out of labor force)
- 96. Other combination at B1 which includes Box #1
- 97. Other combinations at B1 not including Box #1 or #2
- 99. NA--See supervisor before coding this

VAR #

503 Bla. Do you expect to go back to work at this job?

0 in 506-512

1. YES

0 in
504-505

5. NO

8. DK

9. NA

0. Inap, 01, 03-07, 96-97, 99 in 502

504 Blb. When did you last work on this job? -- MONTH

Code MONTH (01-12)

98. DK

99. NA

00. Inap, 01, 03-07, 96-97, 99 in 502; 5, 8-9 in 503

505 Blb. When did you last work on this job? -- YEAR

Code YEAR (1980-1986)

9998. DK

9999. NA

0000. Inap, 01, 03-07, 96-97, 99 in 502; 5, 8-9
in 503

506 Blc. Are you doing any work for pay at the present time?

0 in 507-512

1. YES

5. NO

8. DK

9. NA

0. Inap, 01 in 502; 1 in 503

VAR #

507 Bld. Do you expect to do any work for pay in the future?

1. YES

0 in
508-509

5. NO

8. DK

9. NA

0. Inap, 01 in 502; 1 in 503 or 506

508 Ble. In what month and year do you expect to begin working for pay? -- MONTH

Code MONTH (01-12)

96. As soon as possible

97. Other

98. DK

99. NA

00. Inap, 01 in 502; 1 in 503 or 506; 5, 8-9 in 507

509 Ble. In what month and year do you expect to begin working for pay? -- YEAR

Code YEAR (1986-2020)

9996. As soon as possible

9997. Other

9998. DK

9999. NA

0000. Inap, 01 in 502; 1 in 503 or 506; 5, 8-9 in 507

510 Blf. Have you done any work for pay since we talked to you last in the Spring of 1983?

1. YES

0 in
511-560

5. NO

8. DK

9. NA

0. Inap, 01 in 502; 1 in 503 or 506

VAR #

511 Blg. In how many of the past 36 months have you done any work for pay?

Code # MONTHS (01-36)

01. One month or less

96. None

98. DK

99. NA

00. Inap, 01 in 502; 1 in 503 or 506; 5, 8-9 in 510

512 Blh. Were you working when we talked to you last in the Spring of 1983?

0 in 513-536 ————— 1. YES

0 in 513-560 ————— 5. NO
 ————— 8. DK
 ————— 9. NA

0. Inap, 01 in 502; 1 in 503 or 506; 5, 8-9 in 510

513 B2. Were you working when we talked to you last in the Spring of 1983?

0 in 514 ————— 1. YES

0 in 515-523 ————— 5. NO
 ————— 8. DK
 ————— 9. NA

0. Inap, 5, 8-9 in 510; 1, 5, 8-9 in 512

VAR #

514

B2a. In how many of the past 36 months have you done any work for pay?

Code # MONTHS (01-36)

01. One month or less

98. DK

99. NA

00. Inap, 5, 8-9 in 510; 1, 5, 8-9 in 512; 1 in 513

515

B3. Were you working for the same employer on your main job in the Spring of 1983 as you have now, a different employer, or were you self-employed when we talked to you last?

0 in 516-518,
524-560

1. SAME EMPLOYER

0 in 517-523

2. DIFFERENT EMPLOYER

0 in 516

3. SELF-EMPLOYED

0 in 517-523

8. DK

0 in 516-560

9. NA

0. Inap, 5, 8-9 in 510; 1, 5, 8-9 in 512; 5, 8-9 in 513

516

B4a. In how many of the past 36 months have you done any work for pay?

Code # MONTHS (01-36)

01. One month or less

98. DK

99. NA

00. Inap, 5, 8-9 in 510; 1, 5, 8-9 in 512; 5, 8-9 in 513; 1, 3, or 9 in 515

VAR #

520

B5. About how much do you currently earn before taxes on your main job? (Is that per hour, week, month, or what?) -- CENTS

Code CENTS (00-96)

96. 96 cents or more

98. DK

99. NA

00. Zero cents; Inap, 5, 8-9 in 510; 1, 5, 8-9 in 512; 5, 8-9 in 513; 2, 8-9 in 515; 5, 8-9 in 517

521

B5. About how much do you currently earn before taxes on your main job? (Is that per hour, week, month, or what?) -- PER

1. Hour

2. Day

3. Week

4. 2 weeks

5. Month

6. Year

7. Other

9. NA; DK

0. No earnings from main job; Inap, 5, 8-9 in 510; 1, 5, 8-9 in 512; 5, 8-9 in 513; 2, 8-9 in 515; 5, 8-9 in 517

522

B6. Do you participate in a 401K plan sponsored by your (employer/business), or some other tax deferred salary reduction plan?

1. YES

5. NO

8. DK

9. NA

0. Inap, 5, 8-9 in 510; 1, 5, 8-9 in 512; 5, 8-9 in 513; 2, 8-9 in 515; 5, 8-9 in 517

VAR #

517

B4b. Are you now self-employed on your main job?

0 in 518,
524-560

0 in
519-524

1. YES

5. NO

8. DK

9. NA

0. Inap, 5, 8-9 in 510; 1, 5, 8-9 in 512; 5, 8-9 in 513; 1-2, 8-9 in 515

518

B4c. In how many of the past 36 months have you done any work for pay?

Code # MONTHS (01-36)

01. One month or less

98. DK

99. NA

00. Inap, 5, 8-9 in 510; 1, 5, 8-9 in 512; 5, 8-9 in 513; 1-2, 8-9 in 515; 1 in 517

519

B5. About how much do you currently earn before taxes on your main job? (Is that per hour, week, month, or what?) -- DOLLARS

Code DOLLARS (0 000 001 - 9 999 995)

9 999 996. None; nothing

9 999 998. DK

9 999 999. NA

0 000 000. Inap, 5, 8-9 in 510; 1, 5, 8-9 in 512; 5, 8-9 in 513; 2, 8-9 in 515; 5, 8-9 in 517

VAR #

523

B7. Are you covered by any (other) retirement or pension plan sponsored by your (employer/business), not including Social Security?

1. YES

5. NO

8. DK

9. NA

0. Inap, 5, 8-9 in 510; 1, 5, 8-9 in 512; 5, 8-9 in 513; 2, 8-9 in 515; 5, 8-9 in 517

524

B8. Next are some questions about your current, main job. Are you self-employed on your main job?

1. YES

5. NO

8. DK

9. NA

0. Inap, 5, 8-9 in 510; 1, 5, 8-9 in 512; 1 or 9 in 515; 1, 5, 8-9 in 517

525

B9. (Next are some questions about your current, main job.) What is the official title of your job (the title that your employer uses)?

B9a. What sort of work do you do on your main job?

B9b. Tell me a little more about what you do. What are your main duties or activities?

1970 CENSUS OCCUPATION CODE

3 digits precoded in green to left of question

000. Inap, 5, 8-9 in 510; 1, 5, 8-9 in 512; 1 or 9 in 515; 1 in 517

526

B9c. What kind of business or industry do you work in--that is, what do they make or do at the place where you work?

1970 CENSUS INDUSTRY CODE

3 digits precoded in green to left of question

000. Inap, 5, 8-9 in 510; 1, 5, 8-9 in 512; 1 or 9 in 515; 1 in 517

VAR #

- 527 B10. In what month and year did you begin working for (this employer/yourself)? -- MONTH
-
- Code MONTH (01-12)
98. DK
99. NA
00. Inap, 5, 8-9 in 510; 1, 5, 8-9 in 512; 1 or 9
 in 515; 1 in 517
-
- 528 B10. In what month and year did you begin working for (this employer/yourself)? -- YEAR
-
- Code YEAR (1970-1986)
9998. DK
9999. NA
0000. Inap, 5, 8-9 in 510; 1, 5, 8-9 in 512; 1 or 9
 in 515; 1 in 517
-
- 529 B11. How many weeks per year would you expect to work on this job in a normal year, including paid vacations?
-
- Code # WEEKS PER YEAR (01-52)
98. DK
99. NA
00. Inap, 5, 8-9 in 510; 1, 5, 8-9 in 512; 1 or 9
 in 515; 1 in 517
-
- 530 B12. About how many paid hours do you work on this job in an average week?
-
- Code HOURS PER WEEK (01-95)
96. More than 95 hours per week
98. DK
99. NA
00. Inap, 5, 8-9 in 510; 1, 5, 8-9 in 512; 1 or 9
 in 515; 1 in 517

VAR #

531

B13. About how much do you currently earn before taxes on your main job? (Is that per hour, week, month, or year?) -- DOLLARS

Code DOLLARS (000 001 - 999 995)

999 996. None; nothing

999 998. DK

999 999. NA

000 000. Inap, 5, 8-9 in 510; 1, 5, 8-9 in 512;
1 or 9 in 515; 1 in 517

532

B13. About how much do you currently earn before taxes on your main job? (Is that per hour, week, month, or year?) -- CENTS

Code CENTS (00-95)

95. 95 cents or more

98. DK

99. NA

00. Zero cents; Inap, 5, 8-9 in 510; 1, 5, 8-9
in 512; 1 or 9 in 515; 1 in 517

533

B13. About how much do you currently earn before taxes on your main job? (Is that per hour, week, month, or year?) -- PER

1. Hour

2. Day

3. Week

4. 2 weeks

5. Month

6. Year

7. Other

9. NA; DK

0. No earnings from main job; Inap, 5, 8-9 in 510;
1, 5, 8-9 in 512; 1 or 9 in 512; 1 or 9 in 515;
1 in 517

VAR #

534

B14. Do you participate in a 401K plan sponsored by your (employer/business), or some other tax deferred salary reduction plan?

1. YES

5. NO

8. DK

9. NA

0. Inap, 5, 8-9 in 510; 1, 5, 8-9 in 512; 1 or 9 in 515; 1 in 517

535

B15. Are you covered by any (other) retirement or pension plan sponsored by your (employer/business), not including Social Security?

1. YES

5. NO

8. DK

9. NA

0. Inap, 5, 8-9 in 510; 1, 5, 8-9 in 512; 1 or 9 in 515; 1 in 517

536

B16. INTERVIEWER CHECKPOINT

1. R WAS WORKING IN SPRING OF 1983 (B2 CODED "1")

0 in 537-560

2. ALL OTHERS

0. Inap, 5, 8-9 in 510; 1, 5, 8-9 in 512; 1 or 9 in 515; 1 in 517

VAR #

537 B17. The next few questions are about the main job you had when we talked to you last in the Spring of 1983. In what month and year did you stop working for that employer? -- MONTH

Code MONTH (01-12)

98. DK

99. NA

00. Inap, 5, 8-9 in 510 or 512; 1 or 9 in 515;
1 in 517; 2 in 536

538 B17. The next few questions are about the main job you had when we talked to you last in the Spring of 1983. In what month and year did you stop working for that employer? -- YEAR

Code YEAR (1980-1986)

9998. DK

9999. NA

0000. Inap, 5, 8-9 in 510 or 512; 1 or 9 in 515;
1 in 517; 2 in 536

539 B18. How much did you earn before taxes when you left that job? (Was that per week, per month, or what?) -- DOLLARS

Code DOLLARS (000 001 - 999 995)

999 996. None; nothing

999 998. DK

999 999. NA

000 000. Inap, 5, 8-9 in 510 or 512; 1 or 9
in 515; 1 in 517; 2 in 536

VAR #

540

B18. How much did you earn before taxes when you left that job? (Was that per week, per month, or what?) -- CENTS

Code CENTS (00-96)

96. 96 cents or more

98. DK

99. NA

00. Zero cents; Inap, 5, 8-9 in 510 or 512; 1 or 9 in 515; 1 in 517; 2 in 536

541

B18. How much did you earn before taxes when you left that job? (Was that per week, per month, or what?) -- PER

1. Hour

2. Day

3. Week

4. 2 weeks

5. Month

6. Year

7. Other

9. NA; DK

0. No earnings from main job; Inap, 5, 8-9 in 510 or 512; 1 or 9 in 515; 1 in 517; 2 in 536

VAR #

542

B19. What was the reason for leaving the job you had in the Spring of 1983? Did you retire or become disabled, did you quit, were you laid off, was it a temporary or seasonal job, did the firm close, were you fired, or what?

0 in
543-545

- 01. RETIRED
- 02. DISABLED
- 03. QUIT
- 04. LAID OFF
- 05. TEMPORARY/SEASONAL JOB
- 06. FIRM CLOSED
- 07. FIRED
- 08. Transferred
- 09. R/family moved
- 10. Took leave (incl. for health); pregnancy
- 97. OTHER (SPECIFY)

0 in
543-545

- 98. DK
- 99. NA
- 00. Inap, 5, 8-9 in 510 or 512; 1 or 9 in 515;
1 in 517; 2 in 536

543

B20. Were you required to retire, did you retire because you became disabled, or did you voluntarily choose to retire at that time?

- 1. REQUIRED
- 2. DISABLED
- 3. VOLUNTARY
- 8. DK
- 9. NA
- 0. Inap, 5, 8-9 in 510 or 512; 1 or 9 in 515;
1 in 517; 2 in 536; 02-07, 97-99 in 542

544

B21. Did your employer offer you a bonus or any other financial incentive to retire when you did?

- 1. YES
- 5. NO
- 8. DK
- 9. NA
- 0. Inap, 5, 8-9 in 510 or 512; 1 or 9 in 515;
1 in 517; 2 in 536; 02-07, 97-99 in 542

VAR #

545

B22. Has your employer provided any health insurance coverage during your retirement?

1. YES

5. NO

8. DK

9. NA

0. Inap, 5, 8-9 in 510 or 512; 1 or 9 in 515; 1 in 517; 2 in 526; 02-07, 97-99 in 542

Include as YES if R is still included in employer's group plan even if he pays the total premium himself.

546

B23. Not including Social Security and any severance pay, did you receive benefit payments from any type of employer sponsored retirement, disability, or pension plan from the job you left, or do you expect to receive any such benefits in the future?

1. YES

5. NO

8. DK

9. NA

0. Inap, 5, 8-9 in 510 or 512; 1 or 9 in 515; 1 in 517; 2 in 536

0 in
547-560

547

B24. Did you receive, or will you receive in the near future, any of these benefits in the form of a lump sum payment?

1. YES

5. NO

8. DK

9. NA

0. Inap, 5, 8-9 in 510 or 512; 1 or 9 in 515; 1 in 517; 2 in 536; 5, 8-9 in 546

0 in
548

VAR #

548

B24a. How much was or will that payment be?

Code DOLLARS (0 000 001 - 9 999 995)

9 999 998. DK

9 999 999. NA

0 000 000. Inap, 5, 8-9 in 510 or 512; 1 or 9 in 515;
1 in 517; 2 in 536; 5, 8-9 in 546;
5, 8-9 in 547

549

B25. Do you now receive or do you expect to receive
(additional) regular monthly or yearly benefit
payments from that pension?

1. YES

5. NO

0 in
550-560

8. DK

9. NA

0. Inap, 5, 8-9 in 510 or 512; 1 or 9 in 515;
1 in 517; 2 in 536; 5, 8-9 in 546

550

B25a. In what month and year did you or will you begin
receiving regular payments? -- MONTH

Code MONTH (01-12)

98. DK

99. NA

00. Inap, 5, 8-9 in 510 or 512; 1 or 9 in 515; 1 in
517; 2 in 536; 5, 8-9 in 546 or 549

VAR #

554

B26. INTERVIEWER CHECKPOINT

1. R IS MARRIED OR SEPARATED (SEE A2)

0 in 555-560

2. ALL OTHERS

0. Inap, 5, 8-9 in 510 or 512; 1 or 9 in 515;
1 in 517; 2 in 536; 5, 8-9 in 546 or 549

555

B27. If you were to die, would your (husband/wife) receive regular benefit payments for the rest of (his/her) life from that pension, receive payments for a limited period of time, or would (he/she) receive no benefit payments from that pension plan?

0 in 559-560

1. REST OF LIFE

0 in
556-558

3. LIMITED PERIOD OF TIME

5. NO BENEFITS (include if R's benefits would go to a previous spouse)

0 in
556-560

8. DK

9. NA

0. Inap, 5, 8-9 in 510 or 512; 1 or 9 in 515;
1 in 517; 2 in 536; 5, 8-9 in 546 or 549;
2 in 554

556

B27a. What percent of your pension would your (husband/wife) receive? -- PER CENT

Code PER CENT (001-100)

998. DK

999. NA

000. Inap, 5, 8-9 in 510 or 512; 1 or 9 in 515;
1 in 517; 2 in 536; 5, 8-9 in 546 or 549;
2 in 554; 3, 5, 8-9 in 555; R answered
in dollars

VAR #

557

B27a. What percent of your pension would your (husband/wife) receive? -- DOLLAR AMOUNT

Code AMOUNT in DOLLARS (000 001 - 999 995)

999 998. DK
999 999. NA

000 000. Inap, 5, 8-9 in 510 or 512; 1 or 9 in 515;
1 in 517; 2 in 536; 5, 8-9 in 546
or 549; 2 in 554; 3, 5, 8-9 in 555;
R answered %

558

B27a. What percent of your pension would your (husband/wife) receive? -- PER (UNIT)

3. Week
4. 2 weeks
5. Month
6. Year

7. Other

9. NA; DK

0. Inap, 5, 8-9 in 510 or 512; 1 or 9 in 515;
1 in 517; 2 in 536; 5, 8-9 in 546 or 549;
2 in 554; 3, 5, 8-9 in 555; R answered %

559

B27b. Did your employer offer an option that would make regular benefit payments to surviving spouses for the rest of their lives?

1. YES

5. NO

8. DK

9. NA

0 in
560

0. Inap, 5, 8-9 in 510 or 512; 1 or 9 in 515;
1 in 517; 2 in 536; 5, 8-9 in 546 or 549;
2 in 554; 1, 8-9 in 555

VAR #

560

B27c. Was this a joint decision with your (husband/wife) not to have this option, or was it something you decided yourself?

1. JOINT DECISION

2. R DECIDED

8. DK

9. NA

0. Inap, 5, 8-9 in 510 or 512; 1 or 9 in 515;
1 in 517; 2 in 536; 5, 8-9 in 546 or 549;
2 in 554; 1, 8-9 in 555; 5, 8-9 in 559

1986 SURVEY OF CONSUMER FINANCES

(B28 - B35)

VAR #

601 B28. Are you currently receiving any (other) benefit payments from an employer sponsored retirement or pension plan, not including Social Security?

1. YES

0 in
602-610

5. NO

8. DK

9. NA

602 B28a. How much are you currently receiving per month (from all the other pension or disability benefits)? -- AMOUNT

Code AMOUNT in DOLLARS (000 001 - 999 995)

999 998. DK

999 999. NA

000 000. Inap, 5, 8-9 in 601

603 B28a. How much are you currently receiving per month (from all the other pension or disability benefits)? -- PER

3. Week

4. 2 weeks

5. Month

6. Year

7. Other

9. NA; DK

0. Inap, 5, 8-9 in 601

604 B29. INTERVIEWER CHECKPOINT

1. R IS MARRIED OR SEPARATED (SEE A2)

VAR #

0 in 605-610

2. ALL OTHERS

0. Inap, 5, 8-9 in 601

605

B30. If you were to die, would your (husband/wife) receive regular benefit payments for the rest of (his/her) life from your (other) pension(s), receive payments for a limited period of time, or would (he/she) receive no benefit payments from (this/these) pension(s)?

0 in 609-610

1. REST OF LIFE

0 in
606-608

3. LIMITED PERIOD OF TIME

5. NO BENEFITS

0 in
606-610

8. DK

9. NA

0. Inap, 5, 8-9 in 601; 2 in 604

606

B30a. What percent of your (other) pension(s) would your (husband/wife) receive? -- PER CENT

Code PER CENT (001-100)

998. DK

999. NA

000. Inap, 5, 8-9 in 601; 2 in 604; 3, 5, 8-9 in 605;
R answered in dollars

VAR #

607

B30a. What percent of your (other) pension(s) would your (husband/wife) receive? -- DOLLAR AMOUNT

Code AMOUNT in DOLLARS (000 001 - 999 995)

999 998. DK
999 999. NA

000 000. Inap, 5, 8-9 in 601; 2 in 604; 3, 5, 8-9 in 605; R answered %

608

B30a. What percent of your (other) pension(s) would your (husband/wife) receive? -- PER (UNIT)

3. Week
4. 2 weeks
5. Month
6. Year

7. Other

9. NA; DK

0. Inap, 5, 8-9 in 601; 2 in 604; 3, 5, 8-9 in 605; R answered %

609

B30b. Did your employer offer an option that would make regular benefit payments to surviving spouses for the rest of their lives?

1. YES

5. NO

8. DK

9. NA

0. Inap, 5, 8-9 in 601; 2 in 604; 1, 8-9 in 605

0 in
610

VAR #

610

B30c. Was this a joint decision with your (husband/wife) not to have this option, or was it something you decided yourself?

-
- 1. JOINT DECISION
 - 2. R DECIDED

 - 8. DK
 - 9. NA

 - 0. Inap, 5, 8-9 in 601; 2 in 604; 1, 8-9 in 605;
5, 8-9 in 609

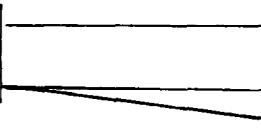
611

B31. Are you (or any member of your family living there) covered by an employer sponsored or a privately paid health insurance plan, such as Blue Cross, Blue Shield, or a Health Maintenance Organization?

-
- 1. YES

 - 5. NO
 - 8. DK
 - 9. NA

0 in 612-621



VAR #

612 B31a. Which family members are covered? (CHECK ALL THAT APPLY)

B31aA. ALL

1. Checked
5. Not checked

USE SAME CODE FOR 613-616

9. NA or DK to entire question B31a

0. Inap, 5 8-9 in 611

613 B31aB. SELF

614 B31aC. SPOUSE

615 B31aD. CHILDREN (including children away at college)

616 B31aE. PARENT; Parent-in-law

617 B31aZ. OTHER (including persons outside HU)

1. Checked
2. Grandchildren
3. Grandparents
4. Inlaws
5. Not checked
6. Siblings and their children
7. Live-in partners and their children
8. Former spouse
9. NA or DK to entire question B31a
0. Inap, 5, 8-9 in 611

VAR #

B31b. Is any part of this medical coverage paid for by your employer or former employer, (your husband's/wife's employer or former employer,) yourself, or what?
(CHECK ALL THAT APPLY.) (INCL. UNION)

618

B31bA. RESPONDENT (FORMER) EMPLOYER

-
1. Checked
 5. Not checked
 9. NA or DK to entire question B31b
 0. Inap, 5, 8-9 in 611

USE SAME CODE FOR 619-620

If R is <u>self-employed</u> and answers "I pay it," code is yourself (C); if R says "compar. pays," code as (A), "employer."

619

B31bB. SPOUSE (FORMER) EMPLOYER

620

B31bC. YOURSELF (includes R and/or Spouse)

621

B31bZ. OTHER (SPECIFY)

-
01. Checked
 02. Child or child's employer
 03. Parent or parent's employer
 04. Former spouse or former spouse's employer
 05. Not checked
 06. State or government agency
 07. Boyfriend/girlfriend or their employer
 08. Siblings/spouse's siblings or their employer
 10. Children's school
 99. NA or DK to entire question B31b
 00. Inap, 5, 8-9 in 611

VAR #

622 B32. Are you (or any member of your family living there) currently eligible to receive benefits from a government health insurance program, such as Medicare, Medicaid, or Veteran's Administration health coverage?

1. YES

0 in
623-626

5. NO

8. DK

9. NA

623

B32a. Which program is that? (CHECK ALL THAT APPLY)
B32aA. MEDICARE, including S.S.I.

1. Checked

5. Not checked

USE SAME CODE
FOR 624-625

9. NA or DK to entire question B32a

0. Inap, 5, 8-9 in 622

624

B32aB. MEDICAID

625

B32aC. VA

VAR #

626

B32aZ. OTHER (SPECIFY)

-
- 01. Checked
 - 02. Military health insurance; CHAMPUS
 - 03. State health insurance; Medi-Cal
 - 04. "Welfare"; ADC; AFDC
 - 05. Not checked

 - 10. Medipac
 - 11. Foster children's health care program
 - 12. Civil service
 - 13. Title 19 (son has Down's syndrome)
 - 14. Narse
 - 15. Medical Assistance
 - 16. Human research benefits
 - 17. Indian hospital
 - 18. Gold plus

 - 99. NA or DK to entire question B32a
 - 00. Inap, 5, 8-9 in 622

627

B33. During the last 3 years, did you (or a member of your family living there) have a major illness or disability which required hospitalization or cost more than \$3,000?

1. YES

0 in 628

5. NO

8. DK

9. NA

628

B33a. Not including the costs paid for by insurance, in total how much did (you/your family) personally have to pay during the last 3 years?

Code AMOUNT in DOLLARS (000 001 - 999 995)

999 996. NONE

999 998. DK

999 999. NA

000 000. Inap, 5, 8-9 in 627

VAR #

629

B34. INTERVIEWER CHECKPOINT

0 in 630,
701-760,
801-855

1. R IS CURRENTLY MARRIED

2. ALL OTHERS

3. R IS MARRIED, BUT SPOUSE INSTITUTIONALIZED

630

B35. INTERVIEWER CHECKPOINT

0 in
811-855

1. R WAS LAST MARRIED BEFORE 1983

3. (Use only if instructed by Supervisor): R's spouse/partner is same person interviewed as spouse/partner in 1983--Code Section C.

0 in 701-760,
801-810

2. ALL OTHERS

0 in 701-760,
801-810

5. R separated in 1983, now reunited with spouse. Spouse new to SCF, so code Section D.

0. Inap, 2 or 3 in 629

1986 SURVEY OF CONSUMER FINANCES

(C1 - C27c)

VAR #

701

C1,C1c. SUMMARY OF OCCUPATION STATUS AND WORKING NOW

Code Occupation Status Summary precoded in green by editors

- 11. Worker only
- 13. Worker + retired/disabled
- 14. Worker + student
- 15. Worker + housewife
- 16. Worker + unemployed

- 18. Worker + temporarily laid off

- 20. Temporarily laid off

- 30. Unemployed and looking for work
- 31. Unemployed and looking for work + retired; disabled

- 34. Unemployed and looking for work + retired; disabled + student

- 50. Retired/disabled--not working at all now
- 51. Retired/disabled--and Housewife

- 70. Student--not working at all now

- 80. Housewife/other not in labor force--not working at all now

- 97. Other (incl. other combination)

- 99. NA
- 00. Inap, 2 1/2 629 or 630

VAR #

702

C1. We are interested in your (husband's/wife's) present job status. Is (he/she) working now, temporarily laid off, unemployed and looking for work, disabled and unable to work, retired, a student, (a housewife,) or what? (CHECK ALL THAT APPLY, e.g., RETIRED AND WORKING NOW--ASK ALL FOLLOW-UP QUESTIONS)

0 in 703-712

- 01. WORKING NOW; ON STRIKE; SICK LEAVE
- 02. TEMPORARILY LAID OFF; ON EXTENDED LEAVE
- 21. Combination of Box 1 and Box 2 checked
- 22. Other combinations including 2

0 in
703-705

- 03. UNEMPLOYED AND LOOKING FOR WORK
- 04. RETIRED; DISABLED
- 05. STUDENT
- 06. HOUSEWIFE
- 07. OTHER (including voluntarily out of labor force)

- 96. Other combination at C1 which includes Box #1
- 97. Other combinations at C1 not including Box #1 or #2

99. NA--See supervisor before coding this

00. Inap, 2 in 629 or 630

VAR #

703

Cla. Does (he/she) expect to go back to work at this job?

0 in 706-712

1. YES

0 in 704-705

5. NO

8. DK

9. NA

0. Inap, 2 in 629 or 630; 01, 03-07, 96-97, 99 in 702

704

Clb. When did (he/she) last work on this job? -- MONTH

Code MONTH (01-12)

98. DK

99. NA

00. Inap, 2 in 629 or 630; 01, 03-07, 96-97, 99 in 702; 5, 8-9 in 703

705

Clb. When did (he/she) last work on this job? -- YEAR

Code YEAR (1980-1986)

9998. DK

9999. NA

0000. Inap, 2 in 629 or 630; 01, 03-07, 96-97, 99 in 702; 5, 8-9 in 703

706

Clc. Is (he/she) doing any work for pay at the present time?

0 in 707-712

1. YES

5. NO

8. DK

9. NA

0. Inap, 2 in 629 or 630; 01 in 702; 1 in 703

VAR #

707

Cld. Does (he/she) expect to do any work for pay in the future?

1. YES

0 in
708-709

5. NO

8. DK

9. NA

0. Inap, 2 in 629 or 630; 01 in 702; 1 in 703 or 706

708

Cle. In what month and year does (he/she) expect to begin working for pay? -- MONTH

Code MONTH (01-12)

96. As soon as possible

98. DK

99. NA

00. Inap, 2 in 629 or 630; 01 in 702; 1 in 703 or 706; 5, 8-9 in 707

709

Cle. In what month and year does (he/she) expect to begin working for pay? -- YEAR

Code YEAR (1986-2020)

9996. As soon as possible

9998. DK

9999. NA

0000. Inap, 2 in 629 or 630; 01 in 702; 1 in 703 or 706; 5, 8-9 in 707

710

Clf. Has (he/she) done any work for pay since we talked to you last in the Spring of 1983?

1. YES

0 in
711-760

5. NO

8. DK

9. NA

VAR #

0. Inap, 2 in 629 or 630; 01 in 702; 1 in 703 or 706

711

C1g. In how many of the past 36 months has (he/she) done any work for pay?

Code # MONTHS (01-36)

01. One month or less

96. None

98. DK

99. NA

00. Inap, 2 in 629 or 630; 01 in 702; 1 in 703 or 706; 5, 8-9 in 710;

712

C1h. Was (he/she) working when we talked to you last in the Spring of 1983?

0 in 713-736

1. YES

0 in
713-760

5. NO

8. DK

9. NA

0. Inap, 2 in 629 or 630; 01 in 702; 1 in 703 or 706; 5, 8-9 in 710;

713

C2. Was (he/she) working when we talked to you last in the Spring of 1983?

0 in 714

1. YES

0 in
715-723

5. NO

8. DK

9. NA

0. Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712

VAR #

714

C2a. In how many of the past 36 months has (he/she) done any work for pay?

Code # MONTHS (01-36)

01. One month or less

98. DK

99. NA

00. Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 1 in 713

715

C3. Was (he/she) working for the same employer on (his/her) main job in the Spring of 1983 as (he/she) has now, a different employer, or was (he/she) self-employed when we talked to you last?

0 in 716-718,
724-760

1. SAME EMPLOYER

0 in 717-723

2. DIFFERENT EMPLOYER

0 in 716

3. SELF-EMPLOYED

0 in 717-723

8. DK

0 in
716-760

9. NA

0. Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 5, 8-9 in 713

716

C4a. In how many of the past 36 months has (he/she) done any work for pay?

Code # MONTHS (01-36)

01. One month or less

98. DK

99. NA

00. Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 5, 8-9 in 713; 1, 3, 9 in 715

VAR #

717

C4b. Is (he/she) now self-employed on (his/her) main job?

0 in 718,
724-760

1. YES

0 in
719-724

5. NO

8. DK

9. NA

0. Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 5, 8-9 in 713; 1-2, 8-9 in 715

718

C4c. In how many of the past 36 months has (he/she) done any work for pay?

Code # MONTHS (01-36)

01. One month or less

98. DK

99. NA

00. Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 5, 8-9 in 713; 1-2, 8-9 in 715; 1 in 717

719

C5. About how much does (he/she) currently earn before taxes on (his/her) main job? (Is that per hour, week, month, or what?) -- DOLLARS

Code DOLLARS (0 000 001 - 9 999 995)

9 999 996. None; nothing

9 999 998. DK

9 999 999. NA

Note: Includes negative amounts.

0 000 000. Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 5, 8-9 in 713; 2, 8-9 in 715; 5, 8-9 in 717

VAR #

720

C5. About how much does (he/she) currently earn before taxes on (his/her) main job? (Is that per hour, week, month, or what?) -- CENTS

Code CENTS (00-96)

96. 96 cents or more

98. DK

99. NA

00. Zero cents; Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 5, 8-9 in 713; 2, 8-9 in 715; 5, 8-9 in 717

721

C5. About how much does (he/she) currently earn before taxes on (his/her) main job? (Is that per hour, week, month, or what?) -- PER

1. Hour

2. Day

3. Week

4. 2 weeks

5. Month

6. Year

7. Other

9. NA; DK

0. No earnings from main job; Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 5, 8-9 in 713; 2, 8-9 in 715; 5, 8-9 in 717

722

C6. Does (he/she) participate in a 401K plan sponsored by (his/her) (employer/business), or some other tax deferred salary reduction plan?

1. YES

5. NO

8. DK

9. NA

0. Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 5, 8-9 in 713; 2, 8-9 in 715; 5, 8-9 in 717

VAR #

723

C7. Is (he/she) covered by any (other) retirement or pension plan sponsored by (his/her) (employer/business), not including Social Security?

1. YES

5. NO

8. DK

9. NA

0. Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 5, 8-9 in 713; 2, 8-9 in 715; 5, 8-9 in 717

724

C8. Next are some questions about your (husband's/wife's) current, main job. Is (he/she) self-employed on (his/her) main job?

1. YES

5. NO

8. DK

9. NA

0. Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 1 or 9 in 715; 1, 5, 8-9 in 717

725

C9. (Next are some questions about your (husband's/wife's) current, main job.) What is the official title of (his/her) job (the title that (his/her) employer uses)?

C9a. What sort of work does (he/she) do on (his/her) main job?

C9b. Tell me a little more about what (he/she) does. What are (his/her) main duties or activities?

1970 CENSUS OCCUPATION CODE

3 digits precoded in green to left of question

000. Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 1 or 9 in 715; 1 in 717

VAR #

- 726 C9c. What kind of business or industry does (he/she) work in--that is, what do they make or do at the place where (he/she) works?
-
- 1970 CENSUS INDUSTRY CODE
- 3 digits precoded in green to left of question
000. Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 1 or 9 in 715; 1 in 717
- 727 C10. In what month and year did (he/she) begin working for (this employer/himself/herself)? -- MONTH
-
- Code MONTH (01-12)
98. DK
99. NA
00. Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 1 or 9 in 715; 1 in 717
- 728 C10. In what month and year did (he/she) begin working for (this employer/himself/herself)? -- YEAR
-
- Code YEAR (1980-1986)
9998. DK
9999. NA
0000. Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 1 or 9 in 715; 1 in 717
- 729 C11. How many weeks per year would (he/she) expect to work on this job in a normal year, including paid vacations?
-
- Code # WEEKS PER YEAR (01-52)
98. DK
99. NA
00. Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 1 or 9 in 715; 1 in 717

VAR #

730

C12. About how many paid hours does (he/she) work on this job in an average week?

Code HOURS PER WEEK (001-995)

998. DK

999. NA

000. Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 1 or 9 in 715; 1 in 717

731

C13. About how much does (he/she) currently earn before taxes on (his/her) main job? (Is that per hour, week, month, or year?) -- DOLLARS

Code DOLLARS (000 001 - 999 995)

999 996. None; nothing

999 998. DK

999 999. NA

000 000. Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 1 or 9 in 715; 1 in 717

732

C13. About how much does (he/she) currently earn before taxes on (his/her) main job? (Is that per hour, week, month, or year?) -- CENTS

Code CENTS (01-96)

96. 96 cents or more

98. DK

99. NA

00. Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 1 or 9 in 715; 1 in 717

VAR #

733

C13. About how much does (he/she) currently earn before taxes on (his/her) main job? (Is that per hour, week, month, or year?) -- PER

1. Hour
2. Day
3. Week
4. 2 weeks
5. Month
6. Year

7. Other

9. NA; DK

0. Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 1 or 9 in 715; 1 in 717

734

C14. Does (he/she) participate in a 401K plan sponsored by (his/her) (employer/business), or some other tax deferred salary reduction plan?

1. YES
5. NO

8. DK
9. NA

0. Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 1 or 9 in 715; 1 in 717

735

C15. Is (he/she) covered by any (other) retirement or pension plan sponsored by (his/her) (employer/business), not including Social Security?

1. YES
5. NO

8. DK
9. NA

0. Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 1 or 9 in 715; 1 in 717

VAR #

736

C16. INTERVIEWER CHECKPOINT

1. SPOUSE WAS WORKING IN SPRING OF 1983 (C2 CODED "1")

0 in 737-760

2. ALL OTHERS

0. Inap, 2 in 629 or 630; 5, 8-9 in 710; 1, 5, 8-9 in 712; 1 or 9 in 715; 1 in 717

737

C17. The next few questions are about the main job your (husband/wife) had when we talked to you last in the Spring of 1983. In what month and year did (he/she) stop working for that employer? -- MONTH

Code MONTH (01-12)

98. DK

99. NA

00. Inap, 2 in 629 or 630; 5, 8-9 in 710 or 712; 1 or 9 in 715; 1 in 717; 2 in 736

738

C17. The next few questions are about the main job your (husband/wife) had when we talked to you last in the Spring of 1983. In what month and year did (he/she) stop working for that employer? -- YEAR

Code YEAR (1980-1986)

9998. DK

9999. NA

0000. Inap, 2 in 629 or 630; 5, 8-9 in 710 or 712; 1 or 9 in 715; 1 in 717; 2 in 736

VAR #

739

C18. How much did (he/she) earn before taxes when (he/she) left that job? (Was that per week, per month, or what?) -- DOLLARS

Code DOLLARS (000 001 - 999 995)

999 996. None; nothing

999 998. DK

999 999. NA

000 000. Inap, 2 in 629 or 630; 5, 8-9 in 710 or 712;
1 or 9 in 715; 1 in 717; 2 in 736

740

C18. How much did (he/she) earn before taxes when (he/she) left that job? (Was that per week, per month, or what?) -- CENTS

Code CENTS (01-96)

96. 96 cents or more

98. DK

99. NA

00. Inap, 2 in 629 or 630; 5, 8-9 in 710 or 712;
1 or 9 in 715; 1 in 717; 2 in 736

741

C18. How much did (he/she) earn before taxes when (he/she) left that job? (Was that per week, per month, or what?) -- PER

1. Hour

2. Day

3. Week

4. 2 weeks

5. Month

6. Year

7. Other

9. NA; DK

0. No earnings from main job; Inap, 2 in 629 or
630; 5, 8-9 in 710 or 712; 1 or 9 in 715;
1 in 717; 2 in 736

VAR #

742

C19. What was the reason for leaving the job (he/she) had in the Spring of 1983? Did (he/she) retire or become disabled, did (he/she) quit, was (he/she) laid off, was it a temporary or seasonal job, did the firm close, was (he/she) fired, or what?

0 in
743-745

Make Card

0 in
743-745

- 01. RETIRED
- 02. DISABLED
- 03. QUIT
- 04. LAID OFF
- 05. TEMPORARY/SEASONAL JOB
- 06. FIRM CLOSED
- 07. FIRED
- 08. Transferred
- 09. R/Family moved
- 10. Took leave (incl. for health); pregnancy
- 97. OTHER (SPECIFY)

- 98. DK
- 99. NA

00. Inap, 2 in 629 or 630; 5, 8-9 in 710 or 712; 1 or 9 in 715; 1 in 717; 2 in 736

743

C20. Was (he/she) required to retire, did (he/she) retire because (he/she) became disabled, or did (he/she) voluntarily choose to retire at that time?

- 1. REQUIRED
- 2. DISABLED
- 3. VOLUNTARY

- 8. DK
- 9. NA

0. Inap, 2 in 629 or 630; 5, 8-9 in 710 or 712; 1 or 9 in 715; 1 in 717; 2 in 736; 02-07, 97-99 in 742

VAR #

744 C21. Did (his/her) employer offer (him/her) a bonus or any other financial incentive to retire when (he/she) did?

- 1. YES
- 5. NO
- 8. DK
- 9. NA
- 0. Inap, 2 in 629 or 630; 5, 8-9 in 710 or 712; 1 or 9 in 715; 1 in 717; 2 in 736; 02-07, 97-99 in 742

745 C22. Has (his/her) employer provided any health insurance coverage during (his/her) retirement?

- 1. YES
- 5. NO
- 8. DK
- 9. NA
- 0. Inap, 2 in 629 or 630; 5, 8-9 in 710 or 712; 1 or 9 in 715; 1 in 717; 2 in 736; 02-07, 97-99 in 742

746 C23. Excluding Social Security and any severance pay, did (he/she) receive benefit payments from any type of employer sponsored retirement, disability, or pension plan from the job (he/she) left, or does (he/she) expect to receive any such benefits in the future?

- 1. YES
- 5. NO
- 8. DK
- 9. NA
- 0. Inap, 2 in 629 or 630; 5, 8-9 in 710 or 712; 1 or 9 in 715; 1 in 717; 2 in 736

0 in
747-760

VAR #

747

C24. Did (he/she) receive, or will (he/she) receive in the near future, any of these benefits in the form of a lump sum payment?

1. YES

0 in
748

5. NO

8. DK

9. NA

0. Inap, 2 in 629 or 630; 5, 8-9 in 710 or 712;
1 or 9 in 715; 1 in 717; 2 in 736; 5, 8-9
in 746

748

C24a. How much was or will that payment be?

Code DOLLARS (000 001 - 999 995)

999 998. DK

999 999. NA

000 000. Inap, 2 in 629 or 630; 5, 8-9 in 710 or 712;
1 or 9 in 715; 1 in 717; 2 in 736;
5, 8-9 in 746 or 747

749

C25. Does (he/she) now receive or does (he/she) expect to receive (additional) regular monthly or yearly benefit payments from that pension?

1. YES

0 in
750-760

5. NO

8. DK

9. NA

0. Inap, 2 in 629 or 630; 5, 8-9 in 710 or 712;
1 or 9 in 715; 1 in 717; 2 in 736; 5, 8-9
in 746

VAR #

750

C25a. In what month and year did (he/she) or will (he/she) begin receiving regular payments? -- MONTH

Code MONTH (01-12)

98. DK

99. NA

00. Inap, 2 in 629 or 630; 5, 8-9 in 710 or 712;
1 or 9 in 715; 1 in 717; 2 in 736; 5, 8-9
in 746 or 749

751

C25a. In what month and year did (he/she) or will (he/she) begin receiving regular payments? -- YEAR

Code YEAR (1980-2036)

9998. DK

9999. NA

0000. Inap, 2 in 629 or 630; 5, 8-9 in 710 or 712;
1 or 9 in 715; 1 in 717; 2 in 736; 5, 8-9
in 746 or 749

752

C25b. How much (does/will) (he/she) receive per month or year? -- AMOUNT

Code AMOUNT in DOLLARS (000 001 - 999 995)

999 998. DK

999 999. NA

000 000. Inap, 2 in 629 or 630; 5, 8-9 in 710 or 712;
1 or 9 in 715; 1 in 717; 2 in 736;
5, 8-9 in 746 or 749

VAR #

753

C25b. How much (does/will) (he/she) receive per month or year? -- PER

- 3. Week
- 4. 2 weeks
- 5. Month
- 6. Year

- 7. Other

- 9. NA; DK

- 0. Inap, 2 in 629 or 630; 5, 8-9 in 710 or 712;
1 or 9 in 715; 1 in 717; 2 in 736;
5, 8-9 in 746 or 749

V754 Built = 0

VAR #

755

C26. If (he/she) were to die, would you receive regular benefit payments for the rest of your life from that pension, receive payments for a limited period of time, or would you receive no benefit payments from that pension plan?

0 in 759-760

1. REST OF LIFE

0 in
756-758

3. LIMITED PERIOD OF TIME

5. NO BENEFITS

0 in
756-760

8. DK

9. NA

0. Inap, 2 in 629 or 630; 5, 8-9 in 710 or 712;
1,, 8-9 in 715; 1 in 717; 2 in 736;
5, 8-9 in 746 or 749

756

C27a. What percent of (his/her) pension would you receive? -- PER CENT

Code PER CENT (001-100)

998. DK

999. NA

000. Inap, 2 in 629 or 630; 5, 8-9 in 710 or 712;
1 or 9 in 715; 1 in 717; 2 in 736;
5, 8-9 in 746 or 749; 3, 5, 8-9 in 755;
R answered in dollars

757

C27a. What percent of (his/her) pension would you receive? -- DOLLAR AMOUNT

Code AMOUNT in DOLLARS (000 001 - 999 995)

999 998. DK

999 999. NA

000 000. Inap, 2 in 629 or 630; 5, 8-9 in 710 or 712;
1 or 9 in 715; 1 in 717; 2 in 736;
5, 8-9 in 746 or 749; 3, 5, 8-9 in
755; R answered %

VAR #

758

C27a. What percent of (his/her) pension would you receive? -- PER (UNIT)

-
- 3. Week
 - 4. 2 weeks
 - 5. Month
 - 6. Year

 - 7. Other

 - 9. NA; DK

 - 0. Inap, 2 in 629 or 630; 5, 8-9 in 710 or 712; 1 or 9 in 715; 1 in 717; 2 in 736; 5, 8-9 in 746 or 749; 3, 5, 8-9 in 755; R answered %

759

C27b. Did (his/her) employer offer an option that would make regular benefit payments to surviving spouses for the rest of their lives?

1. YES

0 in
760

5. NO

8. DK

9. NA

0. Inap, 2 in 629 or 630; 5, 8-9 in 710 or 712; 1 or 9 in 715; 1 in 717; 2 in 736; 5, 8-9 in 746 or 749; 1, 8-9 in 755

760

C27c. Was this a joint decision with you not to have this option, or was it something your (husband/wife) decided (himself/herself)?

1. JOINT DECISION

2. R DECIDED

8. DK

9. NA

0. Inap, 2 in 629 or 630; 5, 8-9 in 710 or 712; 1 or 9 in 715; 1 in 717; 2 in 736; 5, 8-9 in 746 or 749; 1, 8-9 in 755; 5, 8-9 in 759

1986 SURVEY OF CONSUMER FINANCES

(C28 - D20)

VAR #

801 C28. Is (he/she) currently receiving any (other) benefit payments from an employer sponsored retirement or pension plan, not including Social Security?

1. YES

0 in
802-810

5. NO

8. DK

9. NA

0. Inap, 2 in 629 or 630

802 C28a. How much is (he/she) receiving per month (from all the other pension or disability benefits? -- AMOUNT

Code AMOUNT in DOLLARS (000 001 - 999 995)

999 998. DK

999 999. NA

000 000. Inap, 2 in 629 or 630; 5, 8-9 in 801

803 C28a. How much is (he/she) receiving per month (from all the other pension or disability benefits? -- PER

3. Week

4. 2 weeks

5. Month

6. Year

7. Other

9. NA; DK

0. Inap, 2 in 629 or 630; 5, 8-9 in 801

V804 Built = 0

VAR #

805 C29. If (he/she) were to die, would you receive regular benefit payments for the rest of your life from (his/her) (other) pensions, receive payments for a limited period of time, or would you receive no benefit payments from (this/these) pension(s)?

-
- 0 in 809-810 ————— 1. REST OF LIFE
 - 0 in 806-808 ————— 3. LIMITED PERIOD OF TIME
 - 0 in 806-810 ————— 5. NO BENEFITS
 - 0 in 806-810 ————— 8. DK
 - 0 in 806-810 ————— 9. NA
0. Inap, 2 in 629 or 630; 5, 8-9 in 801

806 C30a. What percent of (his/her) (other) pension(s) would you receive? -- PER CENT

Code PER CENT (001-100)

- 998. DK
- 999. NA

000. Inap, 2 in 629 or 630; 5, 8-9 in 801; 3, 5, 8-9 in 805; R answered dollars

807 C30a. What percent of (his/her) (other) pension(s) would you receive? -- DOLLAR AMOUNT

Code AMOUNT in DOLLARS (000 001 - 999 995)

- 999 998. DK
- 999 999. NA

000 000. Inap, 2 in 629 or 630; 5, 8-9 in 801; 3, 5, 8-9 in 805; R answered %

VAR #

808

C30a. What percent of (his/her) (other) pension(s) would you receive? -- PER (UNIT)

- 3. Week
- 4. 2 weeks
- 5. Month
- 6. Year
- 7. Other
- 9. NA; DK
- 0. Inap, 2 in 629 or 630; 5, 8-9 in 801; 3, 5, 8-9 in 805; R answered %

809

C30b. Did (his/her) employer offer an option that would make regular benefit payments to surviving spouses for the rest of their lives?

- 1. YES
- 5. NO
- 8. DK
- 9. NA
- 0. Inap, 2 in 629 or 630; 5, 8-9 in 801; 1, 8-9 in 805

0 in
810

810

C30c. Was this a joint decision with you not to have this option, or was it something your (husband/wife) decided (himself/herself)?

- 1. JOINT DECISION
- 2. SPOUSE DECIDED
- 8. DK
- 9. NA
- 0. Inap, 2 in 629 or 630; 5, 8-9 in 801; 1, 8-9 in 805; 5, 8-9 in 809

VAR #

811

D1,D1c. SUMMARY OF OCCUPATION STATUS AND WORKING NOW

Code Occupation Status Summary precoded in green by editors

- 11. Worker only
- 13. Worker + retired/disabled
- 14. Worker + student
- 15. Worker + housewife
- 16. Worker + unemployed

- 20. Temporarily laid off

- 30. Unemployed and looking for work

- 50. Retired/disabled--not working at all now
- 51. " " --and Housewife

- 70. Student--not working at all now

- 80. Housewife/other not in labor force--not working at all now

- 97. Other (incl. other combination)
- 99. NA
- 00. Inap, 2 in 629; 1 in 630

VAR #

812

D1. We are interested in your (husband's/wife's) present job status. Is (he/she) working now, temporarily laid off, unemployed and looking for work, disabled and unable to work, retired, a student, (a housewife,) or what? (CHECK ALL THAT APPLY, e.g., RETIRED AND WORKING NOW--ASK ALL FOLLOW-UP QUESTIONS)

0 in 813-821

-
- 01. WORKING NOW; ON STRIKE; SICK LEAVE
 - 02. TEMPORARILY LAID OFF; ON EXTENDED LEAVE
 - 21. Combination Box 1 and Box 2 checked
 - 22. Other combinations including 2

0 in
813-815

- 03. UNEMPLOYED AND LOOKING FOR WORK
- 04. RETIRED; DISABLED
- 05. STUDENT
- 06. HOUSEWIFE
- 07. OTHER (including voluntarily out of labor force)
- 96. Other combination at D1 which includes Box #1
- 97. Other combinations at D1 not including Box #1 or #2
- 99. NA--See supervisor before coding this
- 00. Inap, 2 in 629; 1 in 630

VAR #

817 Dld. Does (he/she) expect to do any work for pay in the future?

1. YES

0 in
818-819

5. NO

8. DK

9. NA

0. Inap, 2 in 629; 1 in 630; 01 in 812; 1 in 813
or 816

818 Dle. In what month and year does (he/she) expect to begin working for pay? -- MONTH

Code MONTH (01-12)

98. DK

99. NA

00. Inap, 2 in 629; 1 in 630; 01 in 812; 1 in 813
or 816; 5, 8-9 in 817

819 Dle. In what month and year does (he/she) expect to begin working for pay? -- YEAR

Code YEAR (1986-2020)

9998. DK

9999. NA

0000. Inap, 2 in 629; 1 in 630; 01 in 812; 1 in 813
or 816; 5, 8-9 in 817

VAR #

820

D1f. Has (he/she) ever done any work for pay?

0 in 822-833

1. YES

0 in
821-848

5. NO

8. DK

9. NA

0. Inap, 2 in 629; 1 in 630; 01 in 812; 1 in 813
or 816

821

D1g. In how many of the past 36 months has (he/she) done
any work for pay?

Code # MONTHS (01-36)

01. One month or less

96. "None"

98. DK

99. NA

00. Inap, 2 in 629; 1 in 630; 01 in 812; 1 in 813
or 816; 5, 8-9 in 820

822

D2. Next are some questions about your (husband's/wife's)
current, main job. Is (he/she) self-employed on (his/
her) main job?

1. YES

5. NO

8. DK

9. NA

0. Inap, 2 in 629; 1 in 630; 1, 5, 8-9 in 820

VAR #

- 823 D3. What is the official title of (his/her) job (the title that (his/her) employer uses)?
 D3a. What sort of work does (he/she) do on (his/her) main job?
 D3b. Tell me a little more about what (he/she) does. What are (his/her) main duties or activities?

1970 CENSUS OCCUPATION CODE

3 digits precoded in green to left of question

000. Inap, 2 in 629; 1 in 630; 1, 5, 8-9 in 820

- 824 D3c. What kind of business or industry does (he/she) work in--that is, what do they make or do at the place where (he/she) works?

1970 CENSUS INDUSTRY CODE

3 digits precoded in green to left of question

000. Inap, 2 in 629; 1 in 630; 1, 5, 8-9 in 820

- 825 D4. In what month and year did (he/she) begin working for (this employer/himself/herself)? -- MONTH

Code MONTH (01-12)

98. DK

99. NA

00. Inap, 2 in 629; 1 in 630; 1, 5, 8-9 in 820

- 826 D4. In what month and year did (he/she) begin working for (this employer/himself/herself)? -- YEAR

Code YEAR (1910-1986)

9998. DK

9999. NA

0000. Inap, 2 in 629; 1 in 630; 1, 5, 8-9 in 820

VAR #

827

D5. How many weeks per year would (he/she) expect to work on this job in a normal year, including paid vacations?

Code # WEEKS PER YEAR (01-52)

98. DK

99. NA

00. Inap, 2 in 629; 1 in 630; 1, 5, 8-9 in 820

828

D6. About how many paid hours does (he/she) work on this job in an average week?

Code HOURS PER WEEK (01-95)

98. DK

99. NA

00. Inap, 2 in 629; 1 in 630; 1, 5, 8-9 in 820

829

D7. About how much does (he/she) currently earn before taxes on (his/her) main job? (Is that per hour, week, month, or year?) -- DOLLARS

Code DOLLARS (000 001 - 999 999)

999 998. DK

999 999. NA

000 000. Inap, 2 in 629; 1 in 630; 1, 5, 8-9 in 820

830

D7. About how much does (he/she) currently earn before taxes on (his/her) main job? (Is that per hour, week, month, or year?) -- CENTS

Code CENTS (00-96)

96. 96 cents or more

98. DK

99. NA

00. Zero cents; Inap, 2 in 629; 1 in 630; 1, 5, 8-9 in 820

VAR #

- 831 D7. About how much does (he/she) currently earn before taxes on (his/her) main job? (Is that per hour, week, month, or year?) -- PER
-
1. Hour
 2. Day
 3. Week
 4. 2 weeks
 5. Month
 6. Year
 7. Other
 9. NA; DK
 0. Inap, 2 in 629; 1 in 630; 1, 5, 8-9 in 820
- 832 D8. Does (he/she) participate in a 401K plan sponsored by (his/her) (employer/business), or some other tax deferred salary reduction plan?
-
1. YES
 5. NO
 8. DK
 9. NA
 0. Inap, 2 in 629; 1 in 630; 1, 5, 8-9 in 820
- 833 D9. Is (he/she) covered by any (other) retirement or pension plan sponsored by (his/her) (employer/business), not including Social Security?
-
1. YES
 5. NO
 8. DK
 9. NA
 0. Inap, 2 in 629; 1 in 630; 1, 5, 8-9 in 820

VAR #

834

D10. Is (he/she) currently receiving any benefit payments from an employer sponsored retirement or pension plan, not including Social Security?

If temporary health benefits or workman's comp for short term injury--MAKE CARD.

1. YES

5. NO

8. DK

9. NA

0 in
835-842

0. Inap, 2 in 629; 1 in 630; 5, 8-9 in 820

835

D10a. How much is (he/she) currently receiving per month? -- AMOUNT

Code AMOUNT in DOLLARS (000 001 - 999 995)

999 998. DK

999 999. NA

000 000. Inap, 2 in 629; 1 in 630; 5, 8-9 in 820 or 834

836

D10a. How much is (he/she) currently receiving per month? -- PER

3. Week

4. 2 weeks

5. Month

6. Year

7. Other

9. NA; DK

0. Inap, 2 in 629; 1 in 630; 5, 8-9 in 820 or 834

VAR #

837 D11. If (he/she) were to die, would you receive regular benefit payments for the rest of your life from (his/her) pension, receive payments for a limited period of time, or would you receive no benefit payments from this pension?

-
- 0 in 841-842 ————— 1. REST OF LIFE
 - 0 in 838-840 ————— 3. LIMITED PERIOD OF TIME
 - 0 in 838-840 ————— 5. NO BENEFITS
 - 0 in 838-842 ————— 8. DK
 - 0 in 838-842 ————— 9. NA
 - 0. Inap, 2 in 629; 1 in 630; 5, 8-9 in 820 or 834

838 D11a. What percent of (his/her) pension would you receive? -- PER CENT

Code PER CENT (001-100)

If both % and dollars are given, code %.

- 998. DK
- 999. NA
- 000. Inap, 2 in 629; 1 in 630; 5, 8-9 in 820 or 834; 3, 5, 8-9 in 837; R answered dollars

VAR #

839

D11a. What percent of (his/her) pension would you receive? -- DOLLAR AMOUNT

Code AMOUNT in DOLLARS (000 001 - 999 995)

999 998. DK
999 999. NA

000 000. Inap, 2 in 629; 1 in 630; 5, 8-9 in 820 or 834; 3, 5, 8-9 in 837;
R answered %

840

D11a. What percent of (his/her) pension would you receive? -- PER (UNIT)

3. Week
4. 2 weeks
5. Month
6. Year

7. Other

9. NA; DK

0. Inap, 2 in 629; 1 in 630; 5, 8-9 in 820 or 834;
3, 5, 8-9 in 837; R answered %

841

D11b. Did (his/her) employer offer an option that would make regular benefit payments to surviving spouses for the rest of their lives?

1. YES

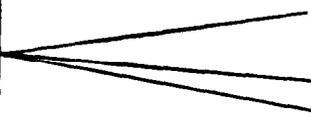
5. NO

8. DK

9. NA

0. Inap, 2 in 629; 1 in 630; 5, 8-9 in 820 or 834;
1, 8-9 in 837

0 in
842



VAR #

842 D11c. Was this a joint decision with you not to have this option, or was it something your (husband/wife) decided (himself/herself)?

-
- 1. JOINT DECISION
 - 2. SPOUSE DECIDED

 - 8. DK
 - 9. NA

 - 0. Inap, 2 in 629; 1 in 630; 5, 8-9 in 820 or 834; 1, 8-9 in 837; 5, 8-9 in 841

843 D12. How many different employers has your (husband/wife) worked for in full-time jobs lasting one year or longer?

0 in 844

-
- Code # FULL-TIME JOBS (01-50)

 - 96. NEVER HAD FULL TIME JOB; "None"
 - 98. DK
 - 99. NA

 - 00. Inap, 2 in 629; 1 in 630; 5, 8-9 in 820

844 D13. Does (he/she) expect to work full-time in the future?

0 in 845-846

-
- 1. YES

0 in 845-848

- 5. NO
- 8. DON'T KNOW
- 9. NA

- 0. Inap, 2 in 629; 1 in 630; 5, 8-9 in 820; 01-50, 98-99 in 843

VAR #

845

D14. At what age did (he/she) begin working for pay at (his/her) first full-time job lasting one year or longer?

Code AGE (10-70)

98. DK

99. NA

00. Inap, 2 in 629; 1 in 630; 5, 8-9 in 820;
1, 5, 8 or 9 in 844

846

D15. About how many years in total has (he/she) worked full-time for pay?

Code # YEARS FULL-TIME (01-70)

98. DK

99. NA

00. Inap, 2 in 629; 1 in 630; 5, 8-9 in 820;
1, 5, 8 or 9 in 844

847

D16. At what age does (he/she) expect to completely stop working on any paid job, including part-time jobs held during retirement years?

Code AGE (18-90)

95. ALREADY STOPPED

96. NEVER STOP

98. DK

99. NA

00. Inap, 2 in 629; 1 in 630; 5, 8-9 in 820; 5, 8-9
in 844

0 in 848

VAR #

848 D16a. At what age did (he/she) stop working for pay?

Code AGE (18-90)

98. DK

99. NA

00. Inap, 2 in 629; 1 in 630; 5, 8-9 in 820; 5, 8-9
in 844; 18-90, 96, 98-99 in 847

849 D17. What is the highest grade of school or year of college
your (husband/wife) completed?

0 in 851 ————— 01-12

0 in 850 ————— 13-17

0 in 850-851 ————— 98. DK
99. NA

0 in 851 ————— 00. 00 grades; Inap, 2 in 629; 1 in 630

850 D17a. Did (he/she) get a high school diploma or pass a high
school equivalency test?

1. YES

5. NO

8. DK

9. NA

0. Inap, 2 in 629; 1 in 630; 13-17, 98-99 in 849

VAR #

851

D17b. Does (he/she) have a college degree?

1. YES

5. NO

Include as "yes" 2-yr. or AA degree.

8. DK

9. NA

0. Inap, 2 in 629; 1 in 630; 00-12, 98-99 in 849

852

D18. What is the month and year of your (husband's/wife's) birth? -- MONTH

Code MONTH (01-12)

98. DK

99. NA

00. Inap, 2 in 629; 1 in 630

853

D18. What is the month and year of your (husband's/wife's) birth? -- YEAR

Code YEAR (1890-1970)

9998. DK

9999. NA

0000. Inap, 2 in 629; 1 in 630

854

D19. Has (he/she) ever been in the military service?

1. YES

5. NO

8. DK

9. NA

0. Inap, 2 in 629; 1 in 630

VAR #

855

D20. How would you describe (his/her) health--excellent,
good, fair or poor?

1. EXCELLENT
2. GOOD
3. FAIR
4. POOR

8. DK
9. NA

0. Inap, 2 in 629; 1 in 630

1986 SURVEY OF CONSUMER FINANCES

(E1 - E25)

VAR #

901 E1. Do you (and your family living there) own your home, pay rent, or what?

0 in 902-906 — 1. OWNS OR IS BUYING

0 in 903, 907-945 — 2. PAYS RENT

0 in 902, 907-945 — 6. NEITHER OWNS NOR RENTS

0 in 902-945 — 8. DK
— 9. NA

902 E2. About how much rent do you pay per month?

Code AMOUNT (0001 - 9995)

9998. DK
9999. NA

0000. Inap, 1, 6, 8-9 in 901

VAR #

903

E3. Could you tell me more about that?

-
- 01. Live-in servant; housekeeper; gardener; farm laborer; others for whom housing is part of job compensation
 - 02. Housing is a gift paid by someone outside HU; owned by relative outside HU; R pays taxes only
 - 03. House sold but R hasn't moved yet
 - 04. Living in house which will inherit; estate in process
 - 05. Living in temporary quarters (garage, shed) while home is under construction
 - 07. Other
 - 10. R lives in public housing (no rent) or has rent paid by public housing authority
 - 11. R lives in nursing home
 - 12. Over the road driver--has no residence
 - 13. Living with parents/in-laws
 - 14. Living with siblings
 - 98. DK
 - 99. NA
 - 00. Inap, 1, 2, 8-9 in 901

904

E4. Have you moved since we last talked to you in the Spring of 1983?

0 in 905-906

-
- 1. YES
 - 3. NO, but interview conducted at 2nd home
 - 5. NO (include R's away temporarily but have returned to same residence as in 1983)
 - 8. DK
 - 9. NA
 - 0. Inap, 1, 8-9 in 901

VAR #

905

E5. Since the Spring of 1983, have you sold a home that was your primary residence?

- 1. YES
- 3. NO, separated spouse lives in home
- 4. NO, relative owned home in 1983

0 in
906

- 5. NO
- 8. DK
- 9. NA

0. Inap, 1, 8-9 in 901; 5 in 904

906

E5a. What was the selling price of that home?

Code DOLLAR AMOUNT (0 000 001 - 9 999 995)

9 999 996. None, home repossessed

9 999 998. DK

9 999 999. NA

0 000 000. Inap, 1, 8-9 in 901; 3-5 in 904; 5, 8-9 in 905

907

E6. Could you tell me the present value of your home? About how much would it bring if it were sold today?

Code DOLLAR AMOUNT (0 000 000 001 - 9 999 999 995)

-6. Only assessed value given

-8. DK

-9. NA

0 000 000 000. Inap, 2, 6, 8-9 in 901

VAR #

908

E7. Have you moved since we last talked to you in the Spring of 1983?

1. YES
2. YES, moved to home owned in 1983
3. YES, moved mobile home to new location
4. NO, buying home previously rented
6. NO, but interview conducted at second home

0 in
909-915

5. NO
8. DK
9. NA

0. Inap, 2, 6, 8-9 in 901

909

E7a. Do you now live in a house, an apartment, a condominium, a mobile home, or what?

1. HOUSE
2. APARTMENT OR CONDOMINIUM
3. MOBILE HOME
4. Co-op
5. Duplex
6. Townhouse

7. OTHER (SPECIFY)

8. DK
9. NA

0. Inap, 2, 6, 8-9 in 901; 3, 5, 6, 8-9 in 908

910

E8. In what month and year was this (house/apartment/mobile home) purchased? -- MONTH

Code MONTH (01-12)

96. Date not given because R inherited home

98. DK
99. NA

00. Inap, 2, 6, 8-9 in 901; 3, 5, 6, 8-9 in 908

VAR #

911

E8. In what month and year was this (house/apartment/mobile home) purchased? -- YEAR

Code YEAR (1880-1986)

9996. Date not given because R inherited home

9998. DK

9999. NA

0000. Inap, 2, 6, 8-9 in 901; 3, 5, 6, 8-9 in 908

912

E9. How much did this (house/apartment/mobile home) cost when it was purchased, not including closing costs?

Code DOLLAR AMOUNT (0 000 001 - 9 999 995)

9 999 996. R inherited home

9 999 998. DK

9 999 999. NA

0 000 000. Inap 2,6,8-9 in 901; 3,5,6,8-9 in 908

913

E10. Since the Spring of 1983, have you sold a home that was your primary residence?

1. YES

3. NO, moved mobile home to new location

4. NO, relatives owned home in 1983

5. NO

8. DK

9. NA

0. Inap 2,6,8-9 in 901; 3,5,6,8-9 in 908

0 in 914



VAR #

914

E10a. What was the selling price of that home?

Code DOLLAR AMOUNT (0 000 001 - 9 999 995)

9 999 998. DK

9 999 999. NA

0 000 000. Inap 2,6,8-9 in 901; 3,5,6,8-9 in 908
or 913

915

E11. Do you have a mortgage or a land contract on your
current home?

0 in 916-925

1. YES

0 in
916-945

5. NO

8. DK

9. NA

0. Inap 2,6,8-9 in 901; 3,5,6, 8-9 in 908

916

E12. Do you have a mortgage or land contract on your
current home?

1. YES

0 in
917-945

5. NO

8. DK

9. NA

0. Inap, 2, 6, 8-9 in 901; 1, 5, 8-9 in 915

VAR #

917

E13. Did you either refinance your first mortgage or take out a new first mortgage since the Spring of 1983 when we last talked?

0 in
918-925

1. YES

5. NO

8. DK

9. NA

0. Inap, 2, 6, 8-9 in 901; 1, 5, 8-9 in 915 or 916

918

E14. How much are the payments for the first mortgage or land contract, not including taxes and insurance, and how often are they due? -- AMOUNT

0 in
920

Code DOLLAR AMOUNT (0 000 001 - 9 999 995)

9 999 996. NO REGULAR PAYMENTS

9 999 998. DK

9 999 999. NA

0 000 000. Inap, 2, 6, 8-9 in 901; 1, 5, 8-9 in 915 or 916; 1 or 8 in 917

VAR #

919

E14. How much are the payments for the first mortgage or land contract, not including taxes and insurance, and how often are they due? -- PER

-
1. Month--includes taxes and insurance
 2. Month--includes taxes but not or NA if insurance
 3. Month--includes insurance but not or NA if taxes
 4. Twice yearly
 5. Month
 6. Year
 7. Other
 8. NO REGULAR PAYMENTS
 9. NA; DK
 0. Inap, 2, 6, 8-9 in 901; 1, 5, 8-9 in 915 or 916; 1 or 8 in 917

920

E14a. How much is still owed on the first mortgage or land contract?

Code DOLLAR AMOUNT (0 000 001 - 9 999 995)

9 999 998. DK
9 999 999. NA

0 000 000. Inap, 2, 6, 8-9 in 901; 1, 5, 8-9 in 915 or 916; 1 or 8 in 917; regular payment coded in 918

921

E15. Do you also have a second mortgage on your home?

0 in
922-945

-
1. YES
 5. NO
 8. DK
 9. NA

0. Inap, 2, 6, 8-9 in 901; 1, 5, 8-9 in 915 or 916; 1 or 8 in 917

922

E16. Did you refinance your second mortgage or take out a new second mortgage since the Spring of 1983?

VAR #

0 in 923-936 — 1. YES

0 in 926-945 — 5. NO

0 in 923-945 — 8. DK
9. NA

0. Inap, 2, 6, 8-9 in 901; 1, 5, 8-9 in 915 or 916;
1 or 8 in 917; 5, 8-9 in 921

923

E17. How much are the payments for the second mortgage, and how often are they due? -- AMOUNT

0 in 925 — Code DOLLAR AMOUNT (0 000 001 - 9 999 995)
9 999 996. NO REGULAR PAYMENTS

9 999 998. DK
9 999 999. NA

0 000 000. Inap, 2, 6, 8-9 in 901; 1, 5, 8-9 in 915
or 916; 1 or 8 in 917; 5, 8-9 in 921; 1, 8 or 9 in 922

924

E17. How much are the payments for the second mortgage, and how often are they due? -- PER

5. Month
6. Year

7. Other

8. NO REGULAR PAYMENTS

9. NA; DK

0. Inap, 2, 6, 8-9 in 901; 1, 5, 8-9 in 915 or 916;
1 or 8 in 917; 5, 8-9 in 921; 1, 8 or 9
in 922

925

E17a. How much is still owed on the second mortgage?

Code DOLLAR AMOUNT (0 000 001 - 9 999 995)

9 999 998. DK

VAR #

9 999 999. NA

0 000 000. Inap, 2, 6, 8-9 in 901; 1, 5, 8-9 in 915
or 916; 1 or 8 in 917; 5, 8-9 in
921; regular payment coded in 923926(A)
937(B)E18. About the (first mortgage or land contract/second
mortgage)...in what month and year was it obtained or
last refinanced? -- MONTH

Code MONTH (01-12)

98. DK

99. NA

00. Inap, 2, 6, 8-9 in 901; 5, 8-9 in 915 or 916;
5, 8-9 in 922; (A only: 1 in 922)927(A)
938(B)E18. About the (first mortgage or land contract/second
mortgage)...in what month and year was it obtained or
last refinanced? -- YEAR

Code YEAR (1910-1986)

9998. DK

9999. NA

0000. Inap, 2, 6, 8-9 in 901; 5, 8-9 in 915 or 916;
5, 8-9 in 922; (A only: 1 in 922)928(A)
939(B)E19. How much was borrowed or financed, not including the
finance charges?

Code DOLLAR AMOUNT (0 000 001 - 9 999 995)

9 999 998. DK

9 999 999. NA

0 000 000. Inap, 2, 6, 8-9 in 901; 5, 8-9 in 915 or
916; 5, 8-9 in 922; (A only: 1 in
922)929(A)
940(B)E20. How much are the payments, not including taxes and
insurance, and how often are they due? -- AMOUNT

Code DOLLAR AMOUNT (0 000 001 - 9 999 995)

VAR #

0 in 931/942 ————— 1 - 9 999 995.

8 in 930/941 ————— 9 999 996. NO REGULAR PAYMENTS
 0 in 932/943 ————— 9 999 998. DK
 0 in 933/944 ————— 9 999 999. NA

0 000 000. Inap, 2, 6, 8-9 in 901; 5, 8-9 in 915 or
 916; 5, 8-9 in 922; (A only: 1 in
 922)

930(A)
 941(B)

E20. How much are the payments, not including taxes and insurance, and how often are they due? -- PER

-
- 1. Month--includes taxes and insurance
 - 2. Month--includes taxes but not or NA if insurance
 - 5. Month
 - 6. Year
 - 7. Other
 - 8. NO REGULAR PAYMENTS
 - 9. NA; DK
 - 0. Inap, 2, 6, 8-9 in 901; 5, 8-9 in 915 or
 916; 5, 8-9 in 922; (A only: 1 in
 922)

931(A)
 942(B)

E21. How much money is still owed on this loan?

Code DOLLAR AMOUNT (0 000 001 - 9 999 995)

9 999 998. DK
 9 999 999. NA

0 000 000. Inap, 2, 6, 8-9 in 901; 5, 8-9 in 915 or
 916; 5, 8-9 in 922; (A only: 1 in
 922)

932(A)
 943(B)

E22. How many years or what number of payments were agreed upon when the loan was taken out? -- YEARS

VAR #

Code # OF YEARS (01-95)

98. DK
99. NA

00. Inap, 2, 6, 8-9 in 901; 5, 8-9 in 915 or 916;
5, 8-9 in 922; (A only: 1 in 922);
R answered payments

933(A)
944(B)

E22. How many years or what number of payments are agreed
upon when the loan was taken out? -- PAYM S

Code # OF PAYMENTS (001-995)

998. DK
999. NA

000. Inap, 2, 6, 8-9 in 901; 5, 8-9 in 915 or 916;
5, 8-9 in 922; (A only: 1 in 922);
98-99 in 932 or 943;
R answered # years

934(A)
945(B)

E23. What is the current annual percentage rate of interest
or finance charge on this loan?

Code % to one decimal (001 - 995)

995. 99.5% or more

996. NONE

998. DK
999. NA

000. Inap, 2, 6, 8-9 in 901; 5, 8-9 in 915 or 916;
5, 8-9 in 922; (A only: 1 in 922)

VAR #

935

E24. Does this mortgage have an interest rate that can rise or fall from time to time depending on some other interest rate or index?

1. YES

5. NO

8. DK

9. NA

0. Inap, 2, 6, 8-9 in 901; 5, 8-9 in 915 or 916;
1, 5, 8-9 in 922

936

E25. Do you also have a second mortgage on your home?

1. YES

0 in
937-945

5. NO

8. DK

9. NA

0. Inap, 2, 6, 8-9 in 901; 5, 8-9 in 915 or 916;
1, 5, 8-9 in 922

1986 SURVEY OF CONSUMER FINANCES

(F1 - F9a)

VAR #

1001

F1. Do you (and your family living there) own any (other) real estate, such as vacation homes, lots, or apartment buildings, not including property owned by a business?

1. YES

0 in
1002-1006

5. NO

8. DK

9. NA

1002

F1a. What is the gross market value of all your (family's) real estate holdings, not including your primary residence?

Code AMOUNT (00 000 001 - 99 999 995)

-8. DK

-9. NA

00 000 000. Inap, 5, 8-9 in 1001

1003

F1b. Do you (or anyone in your family living there) owe any mortgages or debts on these (other) real estate holdings?

1. YES

0 in
1004-1006

5. NO

8. DK

9. NA

0. Inap, 5, 8-9 in 1001

VAR #

1004

Flc. How much are the payments for these mortgages or debts for (other) real estate, not including taxes and insurance, and how often are the payments due? -- AMOUNT

0 in 1006

Code AMOUNT (0 000 001 - 9 999 995)

9 999 996. NO REGULAR PAYMENTS

0 in 1006

9 999 998. DK

9 999 999. NA

0 000 000. Inap, 5, 8-9 in 1001 or 1003

1005

Flc. How much are the payments for these mortgages or debts for (other) real estate, not including taxes and insurance, and how often are the payments due? -- PER

1. Month--includes taxes and insurance

2. Quarterly

3. Week

4. 2 weeks

5. Month

6. Year

7. Other

8. NO REGULAR PAYMENTS

9. NA; DK

0. Inap, 5, 8-9 in 1001 or 1003

1006

Fld. How much is still owed on all these mortgages or debts?

Code AMOUNT (0 000 000 001 - 9 999 999 995)

-8. DK

-9. NA

0 000 000 000. Inap, 5, 8-9 in 1001 or 1003;
1-9 999 995, DK or NA in 1004

VAR #

1007

F2. Since the Spring of 1983 when we talked to you last have you (or anyone in your family there) purchased any kind of car, truck, van, or motorhome, not including vehicles purchased by a business?

1. YES

0 in
1008

5. NO (incl. received as a gift)

8. DK

9. NA

1008

F2a. How much did these vehicles cost in total?

Code AMOUNT (000 001 - 999 995)

999 998. DK

999 999. NA

000 000. Inap, 5, 8-9 in 1007

1009

F3. Did you (and your family living there) make purchases totaling \$3,000 or more of any furniture, appliances, recreation items or additions and repairs to your home?

1. YES

0 in
1010

5. NO

8. DK

9. NA

VAR #

1010

F3a. How much did these items cost in total?

Code AMOUNT (0 000 001 - 9 999 995)

9 999 998. DK

9 999 999. NA

0 000 000. Inap, 5, 8-9 in 1009

1011

F4. Do you (or anyone in your family living there) have any credit cards?

1. YES

5. NO

8. DK

9. NA

0 in
1012

1012

F4a. After the last payment was made, what was the total balance still owed on all your (family's) credit cards?

Code AMOUNT (000 001 - 999 995)

999 996. Zero; none

999 998. DK

999 999. NA

000 000. Inap, 5, 8-9 in 1011

VAR #

1013

F5. Aside from mortgages and credit cards, do you (or anyone in your family living there) owe money on any other loans or debts?

1. YES
2. YES to F5 and NO to F6a-d and F9
5. NO
8. DON'T KNOW
9. NA

0 in
1014-1028

1014(a)
1017(b)
1020(c)
1023(d)

F6. First, I would like to ask you about loans or debts that require regular payments. Do you (or anyone in your family living there) owe any money for additions or repairs to your home, not including money owed on mortgages and credit cards? (RECORD IN F6 BELOW AND ASK F7 BEFORE CONTINUING TO NEXT ITEM.)

F6a. ADDITIONS AND REPAIRS

F6b. (Do you owe any money) for purchases of automobiles, trucks or other vehicles, not including lease payments?

F6c. (Do you own any money) for purchases of furniture, appliances, recreation, or hobby items?

F6d. Do you owe money on any other loans with regular payments, including money owed for travel, medical or education expenses, or personal borrowing for investment purposes?

1. YES
5. NO
8. DK
9. NA
0. Inap, 5 in 1013

0 in
next
2 vars

VAR #

1015(a) F7. How much are these payments, and how often are they
 1018(b) due? (RECORD IN F7 BELOW AND GO TO NEXT ITEM)
 1021(c) -- AMOUNT
 1024(d)

Code DOLLARS (000 001 - 999 995)

999 998. DK

999 999. NA

000 000. Inap, 5 in 1013; 5, 8-9 in F6 for this item

1016(a) F7. How much are these payments, and how often are they
 1019(b) due? (RECORD IN F7 BELOW AND GO TO NEXT ITEM) -- PER
 1022(c)
 1025(d)

-
1. Quarterly
 2. Balloon payment
 3. Week
 4. 2 weeks
 5. Month
 6. Year

7. Other

9. NA; DK

0. Inap, 5 in 1013; 5, 8-9 in F6 for this item

1026 F8. Now thinking of all the various types of debts with
 regular payments, were all the payments made the way
 they were scheduled during the last year, or were
 payments on any of the loans sometimes made later or
 missed?

1. ALL PAID AS SCHEDULED OR SOONER

5. MADE LATER OR MISSED PAYMENTS

8. DK

9. NA

0. Inap, 5 in 1013

VAR #

1027

F9. Do you (or anyone in your family living there) owe any money on any (other) loans which do not require regular payments; for instance, loans on a life insurance policy, or debts to some other person, a bank or employer, a margin account with a broker, or other loans used to purchase your home that you have not already mentioned?

1. YES

0 in 1028

5. NO

8. DK

9. NA

0. Inap, 5 in 1013

1028

F9a. How much is still owed on these other debts that do not require regular payments?

Code AMOUNT (0 000 001 - 9 999 995)

9 999 998. DK

9 999 999. NA

0 000 000. Inap, 5 in 1013; 5, 8-9 in 1027

1029

Completeness for V1012

1. Information missing for spouse only

2. Information missing for family member other than spouse

3. Information missing for spouse and other family member

5. No indication that information is missing for any family member

0. Inap, V1012 not asked or DK/NA

1986 SURVEY OF CONSUMER FINANCES

(G1 - G13)

VAR #

- 1101 G1. People have different reasons for saving. What are
 1102 your (family's) most important reasons for saving?
 1103 (Any other reasons?)
-
01. Children's education; grandchildren's education
 02. Own/spouse's education; education--NA for whom
 03. "For the children/family"--NFS; "to help the kids out"; to have children/baby
 04. Gifts to persons outside FU or to charities/church
 05. To get married
 06. To get children back
 11. Buying own house (code summer cottage in 12)
 12. Purchase of second home or cottage for own use
 13. Buy a car/truck
 14. Home improvement/repairs
 15. To travel; take vacations
 16. Buy durable household goods, appliances, home furnishings; hobby items; for other purchases not codeable above or not specified; "buy things when we need/want them"
 17. Burial; funeral expenses
 18. Moving expenses
 21. Buying (investing in) own business/farm; equipment for business
 22. Retirement; old age
 23. Reserves in case of unemployment
 24. In case of illness; medical/dental expenses
 25. Emergencies; "rainy day"; other unexpected needs; for "security"
 26. Investment reasons (to earn interest, to be diversified, to buy other forms of assets)
 27. To meet contractual commitments (debt repayment, insurance payment, taxes, etc.); "to pay off house"
 28. "To get ahead"; "for the future" to advance standard of living; live comfortably/enjoy life
 29. Ordinary living expenses/bills
 30. Be independent/self-sufficient--no reference to retirement (22) or current living expenses (29)
 31. Tax advantages
 32. Recreation; not further specified

VAR #

1101
1102
1103

G1. Continued

90. R only says: Had extra income; saved because had the money left over--no other purpose specified
91. Wise/prudent thing to do; good discipline to save
93. Convenient to save (automatic deduction)
94. For a new will
96. Don't/can't save
97. Other
98. DK
99. NA
00. Inap, no further mention

VAR #

1104 G2. Do you (or anyone in your family living there) have an individual retirement account--an IRA or a Keogh account?

-
- 1. YES
 - 5. NO
 - 8. DK
 - 9. NA

0 in
1105

1105 G2a. In total, how much is in all your (family's) IRA and Keogh accounts?

Code DOLLARS (0 000 001 - 9 999 995)

- 9 999 998. DK
- 9 999 999. NA

0 000 000. Inap, 5, 8-9 in 1104

1106 G3. Do you (or anyone in your family living there) have any money market accounts or certificates of deposit?

-
- 1. YES
 - 5. NO
 - 8. DK
 - 9. NA

0 in
1107

1107 G3a. How much is in all your (family's) money market accounts and certificates of deposit?

Code DOLLARS (00 000 001 - 99 999 995)

- 8. DK
- 9. NA

00 000 000. Inap, 5, 8-9 in 1106

VAR #

1108 G4. Do you (or anyone in your family living there) have any checking, statement savings, passbook, share draft, or other savings accounts?

1. YES

0 in
1109

5. NO

8. DK

9. NA

1109 G4a. Altogether, how much is in all these savings and checking accounts?

Code DOLLARS (0 000 001 - 9 999 995)

9 999 996. Zero; nothing

See V1125 for
completeness code.

9 999 998. DK

9 999 999. NA

0 000 000. Inap, 5, 8-9 in 1108

1110 G5. Do you (or anyone in your family living there) have any employer sponsored profit sharing, thrift, or other savings plans?

1. YES

0 in
1111

5. NO

8. DK

9. NA

VAR #

1111 G5a. Altogether, how much do you (and your family) have in all these employer sponsored profit sharing, thrift, and other savings plans?

Code DOLLARS (0 000 001 - 9 999 995)

9 999 996. Zero; nothing

9 999 998. DK

9 999 999. NA

0 000 000. Inap, 5, 8-9 in 1110

1112 G6. Do you (or anyone in your family living there) have any savings bonds, municipal, corporate, or any other bonds?

1. YES

5. NO

8. DK

9. NA

0 in
1113

1113 G6a. What is the total face value of all your (family's) savings bonds, municipal, corporate or other bonds?

Code DOLLARS (000 000 001 - 999 999 995)

-8. DK

-9. NA

000 000 000. Inap, 5, 8-9 in 1112

1114 G7. Do you (or anyone in your family living there) have any publicly traded stocks or mutual funds, not including money market or IRA accounts?

1. YES

5. NO

8. DK

9. NA

0 in
1115

VAR #

1115 G7a. What is the current total market value of all your (family's) stocks or mutual funds?

Code DOLLARS (00 000 001 - 99 999 995)

- 8. DK
- 9. NA

00 000 000. Inap, 5, 8-9 in 1114

1116 G8. Do you (or anyone in your family living there) own any other financial assets, such as trusts or managed investment accounts, or notes or land contracts owed to you?

1. YES

0 in
1117

- 5. NO
- 8. DK
- 9. NA

1117 G8a. How much (do you/does your family) have in all these other financial assets, including amounts still owed to you on notes or land contracts?

Code DOLLARS (00 000 001 - 99 999 995)

- 8. DK
- 9. NA

00 000 000. Inap, 5, 8-9 in 1116

1118 G9. Do you (or anyone in your family living there) own an interest in any privately held business, farm, or professional practice or partnership that you have not already mentioned?

1. YES

0 in
1119

- 5. NO
- 8. DK
- 9. NA

VAR #

1119 G9a. What is the net market value of your (family's) interest in all these business holdings?

Code DOLLARS (00 000 001 - 99 999 995)

- 8. DK
- 9. NA

00 000 000. Inap, 5, 8-9 in 1118

1120 G10. Considering all of (your/your family's) savings and reserve funds, overall in the past three years, did you put more money in or take more money out?

-
- 1. PUT MORE MONEY IN
 - 3. NO CHANGE
 - 5. TOOK MORE MONEY OUT
 - 6. NO SAVINGS
 - 8. DK
 - 9. NA

1121 G11. If the rate of interest (you/your family) could earn on all your savings and investments went up by five percentage points, would you decrease the amount you spend so that you could set aside more to save, or would you make no change in your spending habits?

-
- 1. DECREASE SPENDING; INCREASE SAVING
 - 3. Increase spending (will earn more so will spend more
 - 5. NO CHANGE
 - 8. DK
 - 9. NA

VAR #

1122 G12. If (you/your family) won a cash prize equal to about three months of your usual (family) income, would you save all of it, most of it, some of it, a little of it, or none of it?

0 in
1123

-
1. ALL
 2. MOST
 3. SOME
 4. A LITTLE
 5. NONE

 8. DK
 9. NA

1123 G12a. Would you use any of the money to repay debts?

-
1. YES
 5. NO

 8. DK
 9. NA

 0. Inap, 1-2 in 1122

1124 G13. There seem to be two different methods people use to save. Some people first put aside a certain amount for savings and then use the rest for expenses, while other people first pay all their expenses and then use the rest for savings. Which of these two ways comes closest to your (family's) saving habits? (PROBE: Which comes closer?)

-
1. FIRST PUT ASIDE SAVINGS
 2. FIRST PAY EXPENSES

 6. DOES NOT SAVE

 8. DK
 9. NA

VAR #

1125

Completeness for V1105

1. Information missing for spouse only
2. Information missing for family member other than spouse
3. Information missing for spouse and other family member
5. No indication that information is missing for any family member
0. Inap, V1105 not asked or NA

1126

Completeness for V1109

Use same code as for V1125, except:

0. Inap, V1109 not asked or NA

1986 SURVEY OF CONSUMER FINANCES

(H1 - H14b)

VAR #

1201

H1. Do you (or your husband/wife) have any children who attended college or trade school during the past three years?

1. YES

0 in
1202-1209

5. NO (including "no children")

8. DK

9. NA

1202

H2. How many of your (or your husband's/wife's) children have attended college or trade school during the past three years?

Code # IN SCHOOL (1-7)

0 in 1205-1208

1. One

0 in 1207-1208

2. Two

8. DK

9. NA

0. Inap, 5, 8-9 in 1201

VAR #

1203(#1)
1205(#2)
1207(#3)

H2a. About the (oldest/next oldest) child who attended college in the past three years--was this a public four year college, a private four year college, a junior or community college, a trade school, or what?

01. PUBLIC FOUR YEAR
02. PRIVATE FOUR YEAR
03. JUNIOR/COMMUNITY
04. TRADE SCHOOL
05. Training in military including college in military
06. Religious/theological school/training
07. OTHER (SPECIFY)
10. Four year/grad/law school--NA public or private
11. Private law school--NA if attached to university
12. Combination 1 + 2--NA which is current school
98. DK
99. NA
00. Inap, 5, 8-9 in 1201; no (further) children attended college

1204(#1)
1206(#2)
1208(#3)

H2b. How many years of college has this child completed?

Code # YEARS (1-7)

1. One year or less
7. Seven or more
8. DK
9. NA
0. Inap, 5, 8-9 in 1201, no (further) children attended college

VAR #

1209

H3. During the past three years, how much in total did you (and your husband/wife) personally pay for your child(ren)'s college education, including any loans you have taken out?

Code DOLLARS (000 001 - 999 995)

999 996. NONE

999 998. DK

999 999. NA

000 000. Inap, 5, 8-9 in 1201; no (further) children attended college

1210

H4. Do you expect to have any children attend college during the next three years?

1. YES
3. POSSIBLY
5. NO

8. DK
9. NA

1211

H5. During the past three years, did you (and your husband/wife) pay any (other) tuition expenses for a private or parochial school for your children?

1. YES

0 in
1212

5. NO

8. DK

9. NA

1212

H5a. In total how much did you pay during the past three years for private or parochial school tuition expenses?

Code DOLLARS (000 001 - 999 995)

999 998. DK

999 999. NA

000 000. Inap, 5, 8-9 in 1211

VAR #

1213 H6. The next few questions are about the support family members and friends give to and receive from each other. During the past three years, have you (and your husband/wife) shared living quarters for three months or more with adult children, grandchildren, or other relatives or friends?

1. YES

0 in
1214-1224

5. NO

8. DK

9. NA

H6a. With whom have you shared living quarters? (Anyone else?) (CHECK ALL THAT APPLY.)

1214 H6a. A. ADULT CHILDREN (incl. stepchildren)

1. Checked

5. Not checked

USE SAME CODE
FOR 1215-1219

9. NA to entire question H6a

0. Inap, 5, 8-9 in 1213

1215 H6a. B. PARENTS (parents-in-law)

1216 H6a. C. GRANDPARENTS (grandparents-in-law)

1217 H6a. D. GRANDCHILDREN

1218 H6a. E. SIBLINGS (incl. in-laws)

1219 H6a. F. FRIENDS

VAR #

1220

H6a. 2. OTHER (SPECIFY)

- 1. Checked
- 2. Nieces/Nephews
- 3. Cousins
- 4. Aunt/Uncle
- 6. Ex-spouse or partner
- 7. Non-relatives
- 8. Other relatives
- 5. Not checked
- 9. NA to entire question H6a
- 0. Inap, 5, 8-9 in 1213

1221

H6b. Thinking about the most recent time you shared living quarters, did you live in your (friend's/relative's) home, in your own home, or what?

0 in
1222-1224

- 1. R'S HOME
- 2. FRIEND'S OR RELATIVE'S HOME
- 3. Owned/rented/shared equally
- 7. OTHER

0 in
1222-1224

- 8. DK
- 9. NA
- 0. Inap, 5, 8-9 in 1213

1222

H6c. Did any of these (relatives/friends) have any sources of income, such as a job, Social Security, or public assistance?

- 1. YES
- 5. NO
- 8. DK
- 9. NA
- 0. Inap, 5, 8-9 in 1213; 2, 7-9 in 1221

VAR #

1223

H6d. Did any of them make a contribution toward the additional household expenses?

1. YES

0 in
1224

5. NO

8. DK

9. NA

0. Inap, 5, 8-9 in 1213; 2, 7-9 in 1221

1224

H6e. Did this contribution cover all of the additional household expenses, most of the additional expenses, some, or a small part?

1. ALL

2. MOST

3. SOME

4. SMALL PART

8. DK

9. NA

0. Inap, 5, 8-9 in 1213; 2, 7-9 in 1221; 5, 8-9 in 1223

1225

H7. Other than what you have already told me about, during the past three years have you (or anyone in your family living there) provided financial support, made gifts or transferred the title of any assets worth \$3,000 or more in total to relatives or friends who do not live with you?

1. YES

0 in
1226-1233

5. NO

8. DK

9. NA

VAR #

1226 H7a. To whom was this given? (CHECK ALL THAT APPLY.)
 H7a. A. CHILDREN (incl. stepchildren)

1. Checked
 5. Not checked

USE SAME CODE
 FOR 1227-1231

9. NA to entire question H7a
 0. Inap, 5 in 1225

1227 H7a. B. PARENTS (incl. parents-in-law)

1228 H7a. C. GRANDPARENTS (incl. grandparents-in-law)

1229 H7a. D. GRANDCHILDREN (incl. great-grandchildren)

1230 H7a. E. SIBLINGS (incl. in-laws)

1231 H7a. F. FRIENDS

1232 H7a. 2. OTHER (SPECIFY)

1. Checked
 2. Niece/nephew; godchild
 3. Former spouse
 4. Aunt/uncle
 6. Cousin
 7. Other relatives; inlaws
 8. Other friends/beneficiaries

5. Not checked
 9. NA to entire question H7a
 0. Inap, 5 in 1225

VAR #

1233

H7b. What was the total dollar value of all the financial support or other gifts that (you/your family) gave?

Code DOLLARS (0 000 001 - 9 999 995)

9 999 998. DK

9 999 999. NA

0 000 000. Inap, 5 in 1225

1234

H8. Other than what you have already told me about, during the past three years have you (and your family living there) received any such support or gifts worth \$5,000 or more in total from friends or other relatives who do not live with you?

0 in 1243

1. YES

0 in
1235-1242

5. NO

8. DK

9. NA

VAR #

H8a. From whom was this received? (Anyone else?) (CHECK ALL THAT APPLY.)

1235 H8a. A. CHILDREN (incl. stepchildren)

1. Checked
 5. Not checked

USE SAME CODE
 FOR 1236-1240

9. NA to entire question H8a
 0. Inap, 5, 8-9 in 1234

1236 H8a. B. PARENTS (incl. parents-in-law)

1237 H8a. C. GRANDPARENTS (incl. grandparents-in-law)

1238 H8a. D. GRANDCHILDREN

1239 H8a. E. SIBLINGS (incl. in-laws)

1240 H8a. F. FRIENDS

1241 H8a. Z. OTHER (SPECIFY)

1. Checked
 2. Aunt/Uncle
 3. Former spouse
 4. Wedding gift(s)
 6. Other relatives
 5. Not checked
 9. NA to entire question H8a
 0. Inap, 5, 8-9 in 1234

VAR #

1242

H8b. What was the total dollar value of all the financial support or other gifts that (you/your family) received?

Code DOLLARS (000 001 - 999 995)

999 998. DK

999 999. NA

000 000. Inap, 5, 8-9 in 1234

1243

H9. In an emergency, could you (or your husband/wife) get financial assistance of \$3,000 or more from any friends or relatives who do not live with you?

1. YES

3. POSSIBLY

5. NO

8. DK

9. NA

0. Inap, 1 in 1234

VAR #

1244

H10. During the past three years, have you (and others in your family living there) spent a total of 150 unpaid hours or more helping other relatives or friends with an emergency, with child care or care for an elderly person, or with household or other chores?

-
- 1. YES
 - 5. NO
 - 8. DK
 - 9. NA

1245

H11. During the past three years, did you (or anyone in your family living there) make charitable contributions of money or property totaling \$300 or more to educational, religious, medical or community organizations, national or international relief organizations, or to any other charitable groups? (DO NOT INCLUDE POLITICAL CONTRIBUTIONS.)

-
- 1. YES
 - 5. NO
 - 8. DK
 - 9. NA

0 in
1246



1246

H11a. How much did (you/your family) contribute in total to these charitable organizations during the past three years?

Code DOLLARS (0 000 001 - 9 999 995)

- 9 999 998. DK
- 9 999 999. NA

0 000 000. Inap, 5, 8-9 in 1245

VAR #

1247

H12. During the past three years, have you (or anyone in your family living there) volunteered 150 unpaid hours or more to any such charitable organization? (DO NOT INCLUDE POLITICAL CONTRIBUTIONS.)

- 1. YES
- 5. NO

- 8. DK
- 9. NA

1248

H13. During the past three years, did (you/your family) have any unusually large expenses that you paid for yourself, such as a child's marriage, a lawsuit, or any other unusually large expenses that you have not mentioned already?

- 1. YES

- 5. NO
- 8. DK
- 9. NA

0 in
1249-1252



VAR #1249
1250
1251

H13a. What was that expense for? (Were there any other unusually large expenses?)

-
01. Child's marriage
 02. Other wedding expenses (incl. own)
 03. Funeral/burial expenses
 04. Other "special occasion," birthday, graduation

 11. Divorce--NFS
 12. Lawsuit; legal expenses

 14. Clothing (luxury items see 25)

 21. Medical expenses for R/family (incl. childbirth)
 22. Auto and auto repair
 23. Moving expenses
 24. In an accident--NA if medical/auto/or other expenses
 25. Furs/jewelry/luxury apparel
 26. Home appliances
 27. Recreational items
 29. Veterinary expenses; expenses for pets

 31. Downpayment on home
 32. Additions and repairs to home

 41. Vacation; travel
 42. Financial aid/gifts to family or friends
 43. Transportation expenses--not 41

 51. Educational expenses
 52. Investments; real estate except own home
 53. Bankruptcy of business; going out of business
 54. Investment in business equipment
 55. Other business/financial loss

 60. Taxes; back taxes; tax interest/penalties

 70. Losses due to theft, fire, or natural disaster

 91. Repay state welfare/emergency funds
 92. Pay off debt for others

 97. Other

 98. DK
 99. NA

 00. Inap, 5, 8-9 in 1248; no further mentions

VAR #

1252

H13b. How much did it cost you in total (for all these expenses)?

Code DOLLARS (0 000 001 - 9 999 995)

9 999 998. DK

9 999 999. NA

0 000 000. Inap, 5, 8-9 in 1248

1253

H14. During the past three years, did you (or anyone in your family living there) receive any unusually large amounts of money or property, such as an inheritance, receiving an insurance settlement or legal award, winning the lottery, or any other unusually large financial benefits that you have not already mentioned?

1. YES

5. NO

8. DK

9. NA

0 in
1254-1257

VAR #

1254
1255
1256

H14a. From what source did you receive this money or property? (Were there any other sources?)

01. Inheritance, including life insurance
02. Financial aid/gifts from family or friends
03. Church
04. Scholarship
05. Awards--NA what

11. Insurance settlement (except 01); legal award; workman's compensation award
12. Tax refund

21. Lottery/gambling winnings

31. From sale of asset; sold building/stock/business
32. Pension plan (lump sum)
33. Cashed in IRA/life insurance
34. Interest/dividends on stocks
35. Repayment of loan

40. Book advance
41. (Former) employer; severance pay/profit sharing/bonus
42. Earned income/second job

97. Other

98. DK
99. NA

00. Inap, 5, 8-9 in 1253; no further mentions

VAR #

1257

H14b. How much did you receive in total from (this/all these) source(s)?

Code DOLLARS (000 001 - 999 995)

-8. DK

-9. NA

000 000. Inap, 5, 8-9 in 1253

1986 SURVEY OF CONSUMER FINANCES

(J1 - K3)

VAR #

1301

J1. Now, thinking about your (family's) total income from all sources, altogether how much did you (and your family living there) receive in 1985 before taxes and other deductions were made?

0 in 1302

Code DOLLARS (00 000 001 - 99 999 995)

-8. DON'T KNOW

-9. NA

-6. None

Note: Includes
negative amounts.

1302

J2. Did you (and your family living there) receive more than \$25,000 in 1985?

J2a. Was it \$30,000 or more?

J2b. Was it \$40,000 or more?

J2c. Was it \$50,000 or more?

J2d. Was it \$75,000 or more?

J2e. Was it \$100,000 or more?

J2f. Was it \$5,000 or more?

J2g. Was it \$10,000 or more?

J2h. Was it \$15,000 or more?

J2j. Was it \$20,000 or more?

01. NO to J2f -- \$0-5,000

02. NO to J2g -- \$5,000-10,000

03. NO to J2h -- \$10,000-15,000

04. NO to J2j -- \$15,000-20,000

05. YES to J2j -- \$20,000-25,000

06. NO to J2a -- \$25,000-30,000

07. NO to J2b -- \$30,000-40,000

08. NO to J2c -- \$40,000-50,000

09. NO to J2d -- \$50,000-75,000

10. NO to J2e -- \$75,000-100,000

11. YES to J2e -- \$100,000 or more

98. DK

99. NA

00. Inap, amount of income given in J1

VAR #

1303

J3. How much was your (family's) income from all sources in 1984, before taxes and other deductions were made?

0 in 1304

Code DOLLARS (00 000 001 - 99 999 995)

-8. DON'T KNOW

-9. NA

-6. None

Note: Includes
negative amounts.

1304

J4. Did you (and your family living there) receive more than \$25,000 in 1984?

J4a. Was it \$30,000 or more?

J4b. Was it \$40,000 or more?

J4c. Was it \$50,000 or more?

J4d. Was it \$75,000 or more?

J4e. Was it \$100,000 or more?

J4f. Was it \$5,000 or more?

J4g. Was it \$10,000 or more?

J4h. Was it \$15,000 or more?

J4j. Was it \$20,000 or more?

01. NO to J4f -- \$0-5,000

02. NO to J4g -- \$5,000-10,000

03. NO to J4h -- \$10,000-15,000

04. NO to J4j -- \$15,000-20,000

05. YES to J4j -- \$20,000-25,000

06. NO to J4a -- \$25,000-30,000

07. NO to J4b -- \$30,000-40,000

08. NO to J4c -- \$40,000-50,000

09. NO to J4d -- \$50,000-75,000

10. NO to J4e -- \$75,000-100,000

11. YES to J4e -- \$100,000 or more

98. DK

99. NA

00. Inap, amount of income given in J3

VAR #

1305

J5. How much was your (family's) income from all sources in 1983, before taxes and other deductions were made?

0 in 1306

Code DOLLARS (0 000 001 - 9 999 995)

- 8. DON'T KNOW
- 9. NA
- 6. None

1306

J6. Did you (and your family living there) receive more than \$25,000 in 1983?

- J6a. Was it \$30,000 or more?
- J6b. Was it \$40,000 or more?
- J6c. Was it \$50,000 or more?
- J6d. Was it \$75,000 or more?
- J6e. Was it \$100,000 or more?
- J6f. Was it \$5,000 or more?
- J6g. Was it \$10,000 or more?
- J6h. Was it \$15,000 or more?
- J6j. Was it \$20,000 or more?

-
- 01. NO to J6f -- \$0-5,000
 - 02. NO to J6g -- \$5,000-10,000
 - 03. NO to J6h -- \$10,000-15,000
 - 04. NO to J6j -- \$15,000-20,000
 - 05. YES to J6j -- \$20,000-25,000
 - 06. NO to J6a -- \$25,000-30,000
 - 07. NO to J6b -- \$30,000-40,000
 - 08. NO to J6c -- \$40,000-50,000
 - 09. NO to J6d -- \$50,000-75,000
 - 10. NO to J6e -- \$75,000-100,000
 - 11. YES to J6e -- \$100,000 or more
 - 98. DK
 - 99. NA
 - 00. Inap, amount of income given in J5

VAR #

1307

J7. During the past three years, did you (or anyone in your family living there) receive worker's or unemployment compensation, ADC, AFDC, food stamps, SSI, or other public assistance?

- 1. YES
- 5. NO

- 8. DK
- 9. NA

1308

J9. EXACT TIME NOW

Code time (hours and minutes) given 8 a.m. - 12 midnight in military time:

8 a.m.	0800-0859
9 a.m.	0900-0959
10 a.m.	1000-1059
11 a.m.	1100-1159
12 noon	1200-1259
1 p.m.	1300-1359
2 p.m.	1400-1459
3 p.m.	1500-1559
4 p.m.	1600-1659
5 p.m.	1700-1759
6 p.m.	1800-1859
7 p.m.	1900-1959
8 p.m.	2000-2059
9 p.m.	2100-2159
10 p.m.	2200-2259
11 p.m.	2300-2359
12 midnight	2400

9999. NA

VAR #

K1. The sex, age, and relationship to the respondent of each of the other members of the household.

1309

SUMMARY K1a-c: TOTAL # persons listed

Code # listed (01-20)

0 in 1313-1348	01. One
0 in 1316-1348	02. Two
0 in 1319-1348	03. Three
0 in 1322-1348	04. Four
0 in 1325-1348	05. Five
0 in 1328-1348	06. Six
0 in 1331-1348	07. Seven
0 in 1334-1348	08. Eight
0 in 1337-1348	09. Nine
0 in 1340-1348	10. Ten
0 in 1343-1348	11. Eleven
0 in 1346-1348	12. Twelve
	98. DK
	99. NA

VAR #

1310(#1)
1313(#2)
1316(#3)
1319(#4)
1322(#5)
1325(#6)
1328(#7)
1331(#8)
1334(#9)
1337(#10)
1340(#11)
1343(#12)
1346(#13)

Kla. LIST BY RELATIONSHIP TO RESPONDENT

01. Respondent
02. Spouse of respondent
03. Partner of respondent

04. Child (incl. in-laws)
05. Grandchild

06. Parent (incl. in-laws)
07. Grandparent (incl. in-laws)

08. Aunt/uncle
09. Cousin
10. Niece/nephew
11. Sibling (incl. in-law)

29. Other relative
31. Roommate
32. "Friend" (except partner)
33. Relative of partner
34. Live-in paid help; housekeeper; nanny
35. Roomers and boarders

39. Other unrelated person

40. Partner's child
41. Foster children
42. Ex-spouse
43. Friend's child
44. Ex-spouse's child (not R's)
45. Cousin's fiance
46. Relative--NA how

97. Other

98. DK
99. NA

00. Inap, no further persons in HU

VAR #

1311(#1)
 1314(#2)
 1317(#3)
 1320(#4)
 1323(#5)
 1326(#6)
 1329(#7)
 1332(#8)
 1335(#9)
 1338(#10)
 1341(#11)
 1344(#12)
 1347(#13)

K1b. SEX

1. Male
 2. Female

 9. NA

 0. Inap, no further persons in HU

1312(#1)
 1315(#2)
 1318(#3)
 1321(#4)
 1324(#5)
 1327(#6)
 1330(#7)
 1333(#8)
 1336(#9)
 1339(#10)
 1342(#11)
 1345(#12)
 1348(#13)

K1c. AGE

Code AGE (01-96)

 01. One year or less

 98. DK
 99. NA

 00. Inap, no further persons in HU

1349

K1. SUMMARY: # adult persons in FU

Count # persons 18 or older in HU who are related to
 the R by blood, marriage, or adoption

Code # adults in FU (01-20)

98. DK
 99. NA

VAR #

1350

K1. SUMMARY: # persons 65 or older in FU

Code # 65+ (00-10)

98. DK

99. NA

1351

K1. SUMMARY: # persons under 18 in FU

Code # children (00-20)0 in 1352-1353

00. Zero; none

98. DK

99. NA

1352

K1. Age of youngest child under 18 in FU

Code AGE (01-17)

99. NA

00. Inap, 00 in 1351

If only one child in
FU, code age as youngest
and oldest child.

1353

K1. Age of oldest child under 18 in FU

Use same code as for V1352

VAR #

1354

K1. SUMMARY: # Persons in HU not in FU

Count # persons of any age who are not related to the head by blood, marriage, or adoption.

Code # (00-10)

99. NA

1355

K2. Number of calls from cover sheet

Code NUMBER (01-95)

99. NA

1356

K3. Initial refusal on cover sheet?

1. YES

5. NO

9. NA

VAR #

1357

Completeness for V1301-V1302

1. Information missing for spouse only
2. Information missing for family member other than spouse
3. Information missing for spouse and other family member
5. No indication that information is missing for any family member
0. Inap, both V1301 and V1302 NA

1358

Completeness for V1303-V1304

Use same code as for V1357, except:

0. Inap, both V1303 and V1304 NA

1359

Completeness for V1305-V1306

Use same code as for V1357, except:

0. Inap, both V1305 and V1306 NA