Z850_PATH preload
1.   Deceased R was a mobile home or farm owner OR
      Deceased R was non-financial R homeowner in previous wave: (Ask
      Sequence 1)
3.   R was an 'other' homeowner (Ask Sequence 2)
****

A010
Q515
CS1B. IWER: EXIT PROXY FOR THIS CASE WAS *PROXY NAME, PROXY RELATIONSHIP* OF
      THE LATE *R's FIRST, LAST NAME*.

      IS CURRENT PROXY THE SAME PERSON OR SOMEONE ELSE?

      IF NAME OR RELATIONSHIP OF PREVIOUS WAVE PROXY IS UNKNOWN ({Z094 *or*
      Z096} IS EMPTY):
      [IWER: THE NAME OR RELATIONSHIP OF THE PROXY AT THE PREVIOUS INTERVIEW
      IS NOT RECORDED. UNLESS YOU LEARN FROM THE CURRENT PROXY THAT S/HE ALSO
      DID THE EXIT PROXY INTERVIEW FOR R IN *IW_MONTH*, *IW_YEAR,* ENTER CODE 3
      BELOW.]

1. SAME PERSON AS IN PRIOR-WAVE	2. DIFFERENT/ NEW PERSON	3. NOT KNOWN IF SAME OR DIFFERENT AS IN PRIOR WAVE

      CONTINUE   (IF '2' OR '3' ABOVE) SUSPEND THIS CASE IF YOU HAVE
                      THE WRONG PROXY AND RESELECT THE CORRECT LINE **OR**
                      ATTEMPT TO LOCATE THE CORRECT PROXY.

A013
(As you may remember, *R's FIRST NAME* was a part of the Health and Retirement
Study, an important study about issues of aging.) After [he/she] died, we
spoke with you about his/her death. We would like to ask a few more
questions now about the final estate settlement.

This interview is completely voluntary. If we should come to any question
that you don't want to answer, just let me know and I will go on to the next
question. The answers you give will be kept confidential.

We are required to report to State officials credible evidence of serious
harm or abuse to any person, but we will not ask you any questions about such
topics.

        IWER: PRESS 1 TO CONTINUE

A013_Continue (A013_)
        CONTINUE...

A Department of Health and Human Services Certificate of Confidentiality
covers this research in order to help ensure your privacy. This certificate
can help protect the investigators from being forced to release any research
information that identifies you.

(This interview may be recorded so that my supervisor can evaluate my
performance.)

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IWER: PRESS 1 TO CONFIRM THAT YOU HAVE READ THE ABOVE STATEMENT TO THE RESPONDENT

T101 BRANCHPOINT: IF R WAS NOT A MOBILE HOME OR FARM OWNER AND WAS NOT PREVIOUS WAVE NON-FINANCIAL R (Z850_PATH NOT 1 AND NOT 2) GO TO T161 BRANCHPOINT

***************** *BEGIN SEQUENCE 1 ON HOME DISPOSITION* *****************
***** *ASKED FOR MOBILE HOME/FARM OWNERS AND PREVIOUS WAVE NON-FIN Rs* ******

T101
Q2323X
N1x. First I have some questions about the disposition of *R's FIRST NAME's* home.

IF PROXY IS THE SURVIVING SPOUSE/PARTNER (CS1A/A009=2):
Our records show that you and *R's FIRST NAME* owned a home in *HH's LAST IW 1ST RESIDENCE CITY, STATE* the last time we talked with [him/her] in [*R's LAST IW MONTH, YEAR.*

IF R'S SPOUSE/PARTNER WAS STILL LIVING (CS5/A023=1)
Our records show that *R's FIRST NAME* and [his/her] [husband/wife/partner] owned a home in *HH's LAST IW 1ST RESIDENCE CITY, STATE* the last time we talked with [him/her] in [*R's LAST IW MONTH, YEAR.*—

OTHERWISE:
Our records show that *R's FIRST NAME* owned a home in *HH's LAST IW 1ST RESIDENCE CITY, STATE* the last time we talked with [him/her] in [*R's LAST IW MONTH, YEAR.*
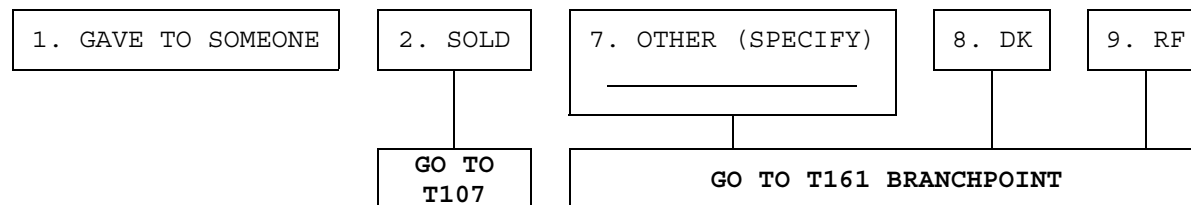
ASK ALL PROXIES:
Please, let me confirm, did *R's FIRST NAME* still own that home when [he/she] died?

1. YES	2. RECORDS INCORRECT	5. NO	8. DK	9. RF
GO TO T111	GO TO END		GO TO T161 BRANCHPOINT	
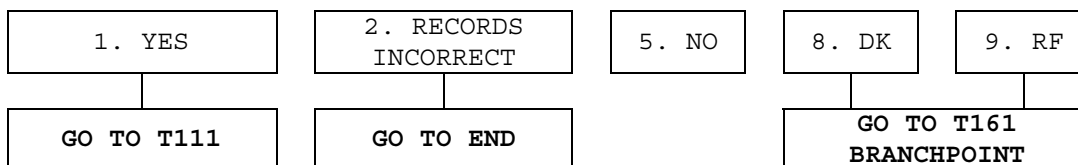
T102
Q2324X
N1ax. What happened to that home — did *R's FIRST NAME* sell it, give it to someone, or what?

1. GAVE TO SOMEONE	2. SOLD	7. OTHER (SPECIFY)	8. DK	9. RF
	GO TO T107	GO TO T161 BRANCHPOINT		

T104
Q2325X
N1bx. To whom did [he/she] give the house, (that is, what was their relationship to *R's FIRST NAME*)?

[IWER: CHOOSE ALL THAT APPLY]

1. SPOUSE	2. CHILD/CHILD-IN-LAW/GRANDCHILD	3. OTHER RELATIVE
4. FRIEND	5. CHARITY	6. GRANDCHILD	7. SOMEONE ELSE
8. DK	9. RF

T105 BRANCHPOINT: IF PROXY DID NOT REPORT THAT R GAVE THE HOUSE TO A
                  CHILD/GRANDCHILD (T104 NOT 2), GO TO T107

T105
Q2326X
N1cx. (Which child is that?)

[IWER: CHOOSE ALL THAT APPLY]

IF GRANDCHILD:
Which child of *R's FIRST NAME* (or [you/[his/her]
[husband/wife/partner]]) is the parent of that grandchild?

CHILD NAME(S)
[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]
041. THROUGH 950. *CHILD NAME(S)*
[ROWS PROVIDED BY BLAISE AS NECESSARY]
037. DECEASED CHILD
038. ALL CHILDREN
039. ALL CHILDREN EQUALLY
997. OTHER (SPECIFY)
998. DK
999. RF

*NOTE: NAMES OF ALL LIVING AND DEAD CHILDREN ARE DISPLAYED. NAMES OF
        SPOUSE/PARTNERS OF CHILDREN ARE NOT DISPLAYED.*

```
T107
Q2335X
N2.    IF R SOLD THE HOME (T102=2)
       What was the selling price?

       OTHERWISE:
       What was the value of that house?  I mean, what would it have brought
       if it had been sold?

       [IWER: DO NOT PROBE DK/RF]
```

	DK	RF

_____
AMOUNT

GO TO T161 BRANCHPOINT

R2336. Did it amount to less than $50,000, more than $50,000, or what?	1. LESS THAN $50,000	3. ABOUT $50,000	5. MORE THAN $50,000	8. DK	9. RF
	GO TO R2338	**GO TO T111 BRANCHPOINT**		**GO TO T111 BRANCHPOINT**	

R2337. Did it amount to less than $200,000, more than $200,000, or what?	1. LESS THAN $200,000	3. ABOUT $200,000	5. MORE THAN $200,000	8. DK	9. RF
	GO TO T111 BRANCHPOINT				

R2338. Did it amount to less than $15,000, more than $15,000, or what?	1. LESS THAN $15,000	3. ABOUT $15,000	5. MORE THAN $15,000	8. DK	9. RF

T111 BRANCHPOINT: GO TO T161 BRANCHPOINT

T111
Q2343X
N3x. What happened to that home after *R's FIRST NAME*'s death:

    IF PROXY IS THE SURVIVING SPOUSE/PARTNER (CS1A/A009=2):
    At the time the estate was settled, did you keep the house, was it
    sold, was it inherited by someone else, has it not yet been disposed
    of, or what?

    IF R's SPOUSE/PARTNER WAS STILL LIVING (CS5/A023=1):
    At the time the estate was settled, did [his/her] husband/wife/partner]
    keep the house, was it sold, was it inherited by someone else, has it
    not yet been disposed of, or what?

    OTHERWISE:
    Was it sold, was it inherited by someone else, has it not yet been
    disposed of, or what?

1. SURVIVING SPOUSE STILL OWNS IT	2. SOLD	3. INHERITED	4. NOT YET DISPOSED
GO TO T161 BRANCHPOINT	**GO TO T116**		**GO TO T120**

7. OTHER (SPECIFY) _____	8. DK	9. RF

GO TO T161 BRANCHPOINT

T113
Q2344X
N3ax. Who inherited the house, (that is, what was their relationship to *R's
      FIRST NAME*)?

      [IWER: CHOOSE ALL THAT APPLY]

1. SPOUSE	2. CHILD/CHILD-IN-LAW/GRANDCHILD	3. OTHER RELATIVE
4. FRIEND	5. CHARITY	6. GRANDCHILD	7. SOMEONE ELSE
8. DK	9. RF		

T114 BRANCHPOINT: IF PROXY DID NOT REPORT THAT CHILD/GRANDCHILD INHERITED THE
                  HOUSE (T113 NOT 2), GO TO T116

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T114
Q2345X
N3bx. (Which child is that?)

    [IWER: CHOOSE ALL THAT APPLY]

    IF GRANDCHILD:
    Which child of *R's FIRST NAME* (or [you/[his/her]
    [husband/wife/partner]]) is the parent of that grandchild?

CHILD NAME(S)
[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]
041. THROUGH 950. *CHILD NAME(S)*
[ROWS PROVIDED BY BLAISE AS NECESSARY]
037. DECEASED CHILD
038. ALL CHILDREN
039. ALL CHILDREN EQUALLY
997. OTHER (SPECIFY)
998. DK
999. RF

    NOTE: NAMES OF ALL LIVING AND DEAD CHILDREN ARE DISPLAYED. NAMES OF
        SPOUSE/PARTNERS OF CHILDREN ARE NOT DISPLAYED.

T116
Q2347X
N4x. IF R SOLD THE HOME (T111=2)
    What was the selling price?

    OTHERWISE:
    What was the value of that house? I mean, what would it have brought
    if it had been sold?

    [IWER: DO NOT PROBE DK/RF]

DK		RF

_____
      AMOUNT

**GO TO T161
BRANCHPOINT**

R2348. Did it amount to less than $50,000, more than $50,000, or what?

1. LESS THAN $50,000	3. ABOUT $50,000	5. MORE THAN $50,000	8. DK	9. RF
	GO TO T120 BRANCHPOINT	**GO TO R2350**	**GO TO T120 BRANCHPOINT**	

R2349. Did it amount to less than $15,000, more than $15,000, or what?

1. LESS THAN $15,000	3. ABOUT $15,000	5. MORE THAN $15,000	8. DK	9. RF

GO TO T120 BRANCHPOINT

R2350. Did it amount to less than $200,000, more than $200,000, or what?

1. LESS THAN $200,000	3. ABOUT $200,000	5. MORE THAN $200,000	8. DK	9. RF

T120 BRANCHPOINT: GO TO T161 BRANCHPOINT

T120
Q2351X
N5x. Was that home left vacant at that time, or was someone living there?

1. VACANT	2. OCCUPIED	8. DK	9. RF
GO TO T161 BRANCHPOINT		**GO TO T161 BRANCHPOINT**	

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T121
Q2352X
N5ax. Who lived in the house, (that is, what was their relationship to *R's FIRST NAME*)?

[IWER: CHOOSE ALL THAT APPLY]

| 1. SPOUSE | 2. CHILD/CHILD-IN-LAW/GRANDCHILD | 3. OTHER RELATIVE |

| 4. FRIEND | 5. CHARITY | 6. GRANDCHILD | 7. SOMEONE ELSE |

| 8. DK | 9. RF |

N5bx/T122 BRANCHPOINT: IF PROXY DID NOT REPORT THAT CHILD/GRANDCHILD LIVES IN HOUSE (T121 NOT 2), GO TO T161 BRANCHPOINT

T122
Q2354X
N5bx. (Which child is that?)

[IWER: CHOOSE ALL THAT APPLY]

IF GRANDCHILD:
Which child of *R's FIRST NAME* (or [you/[his/her] [husband/wife/partner]]) is the parent of that grandchild?

CHILD NAME(S) [DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]
041. THROUGH 950. *CHILD NAME(S)*
[ROWS PROVIDED BY BLAISE AS NECESSARY]
037. DECEASED CHILD
038. ALL CHILDREN
039. ALL CHILDREN EQUALLY
997. OTHER (SPECIFY)
998. DK
999. RF

NOTE: NAMES OF ALL LIVING AND DEAD CHILDREN ARE DISPLAYED. NAMES OF SPOUSE/PARTNERS OF CHILDREN ARE NOT DISPLAYED.

*************** END SEQUENCE 1 ON HOME DISPOSITION ***************

*************** BEGIN SEQUENCE 2 ON ESTATE DISPOSITION ***************

T161 BRANCHPOINT: IF R WAS A MOBILE HOME OR FARM OWNER OR WAS PREVIOUS WAVE NON-
FINANCIAL R (Z850_PATH = NOT 1) GO TO T242 BRANCHPOINT

IF R HAD {A TRUST *or* A PROBATED WILL} ({N71x/T155 *or*
N72ax/T157}=1), GO TO T163 LOOP BRANCHPOINT

T161
Q2430X

N73x. First I have some questions are about *R's FIRST NAME*'s assets and possessions, excluding any life insurance.

Have they been divided up among the heirs, have they not yet been distributed, was there nothing of much value to distribute, or what?

1. DIVIDED AMONG THE HEIRS, OR RETAINED BY THOSE WITH JOINT TENANCY	2. NOT YET DISTRIBUTED

3. NOTHING MUCH OF VALUE	7. OTHER (SPECIFY) _____	8. DK	9. RF

T163 LOOP BRANCHPOINT: IF {R HAD NEITHER A TRUST NOR A WILL ({N71x/T155 *and*
N72ax/T157} NOT 1)} *and* {{ASSETS/POSSESSIONS WERE NOT DIVIDED
AMONG HEIRS *and* THE RESPONSE WAS NOT OTHER (SPECIFY)} (T161
{NOT 1 *and* NOT 7})}, GO TO T242 BRANCHPOINT

IF R WAS NOT PART OF A COUPLE (X065 = 6), GO TO T164
BRANCHPOINT

BEGINNING OF T163 LOOP: ESTATE DISPERSAL
T163 THROUGH T908-8 ARE ASKED FOR POTENTIAL BENEFICIARIES OF R's ESTATE.

T163
Q2432X
N74x. IF R HAD {A TRUST *and/or* A WILL} ({N71x/T155 *and* N72x/T156}=1 *or*
    N71x/T155=1 *or* N72x/T156=1):
    Did [he/she] make provisions in [either the trust or the will/the
    trust/the will] for [you/[[his/her] [husband/wife/partner]]]?

    OTHERWISE:
    Were any of [his/her] possessions or assets left to [you/[[his/her]
    [husband/wife/partner]]]?

1. YES	5. NO	8. DK	9. RF

```
                  GO TO T164 BRANCHPOINT
```

***BEGINNING OF **BLOCK_1: AMOUNT TO SPOUSE/PARTNER**
    (T902_1 - T908_1)

T902_1
Q2433X
N74ax. Excluding any life insurance, how much did [you/[[his/her]
    [husband/wife/partner]]] receive from [his/her] estate?

    [IWER: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE]

    [IWER: DO NOT PROBE DK/RF]

```
                OR                              | DK |   | RF |
_____        _____
   T902_1                  T903_1
   Q2433X                  Q2434X
 N74ax. AMOUNT           N74aax.
                         PERCENT

         GO TO T164 BRANCHPOINT
```

T904_1
Q2436X
N74bx. Was it more than half of [his/her] estate?

1. YES	5. NO	8. DK	9. RF

```
                 GO TO T907_1      GO TO T164
                                   BRANCHPOINT
```

T905_1
Q2437X
N74cx. Was it more than 75 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF

GO TO T164 BRANCHPOINT

T906_1
Q2438X
N74dx. Was it more than 90 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF

GO TO T164 BRANCHPOINT

T907_1
Q2439X
N74ex. Was it more than 25 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF

GO TO T164 BRANCHPOINT	**GO TO T164 BRANCHPOINT**

T908_1
Q2440X
N74fx. Was it more than 10 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF

***END OF **BLOCK_1:** AMOUNT TO SPOUSE/PARTNER (T902_1 - T908_1)

T164 BRANCHPOINT: IF R DOES NOT HAVE ANY CHILDREN (A101=0) *and* R DID NOT REPORT
HAVING GRANDCHILDREN (D40/E046 NOT {>0 - <81}), GO TO T168

T164
Q2441X
N75x. (First I have some questions are about *R's FIRST NAME*'s assets and
    possessions, excluding any life insurance.)

    IF R HAD {A TRUST *and/or* A WILL} ({N71x/T155 *and* N72x/T156}=1 *or*
    N71x/T155=1 *or* N72x/T156=1):
    (Again,) excluding any life insurance, did [he/she] make provisions in
    [either the trust or the will/the trust/the will] for any of [his/her]
    [children or grandchildren (or great-
    grandchildren)/children/grandchildren (or great-grandchildren)]?

    OTHERWISE:
    (Again,) excluding any life insurance, were any of [his/her]
    possessions left to any of [his/her] [children or grandchildren (or
    great-grandchildren)/children/grandchildren (or great-grandchildren)]?

    [IWER: PLEASE RECORD ANY INFORMATION ABOUT ULTIMATE BENEFICIARIES IN F2
    COMMENTS]

1. YES	5. NO	8. DK	9. RF

GO TO T168 (for 5. NO, 8. DK, 9. RF)

N75ax/T165 BRANCHPOINT: IF R HAS FEWER THAN 2 CHILDREN (A101 ≤ 1), GO TO T166
                               BRANCHPOINT

T165
Q2442X
N75ax. Did *R's FIRST NAME* provide equally for all of [his/her] children and
    their families?

1. YES	5. NO	8. DK	9. RF

GO TO T902_2 (for 1. YES)

N75aax/T166 BRANCHPOINT: IF R DOES NOT HAVE ANY GRANDCHILDREN (D40/E046 NOT {>0
                            - <81}), GO TO T902_2

T166
Q2443X
N75aax. Did [he/she] leave the same amount to each of [his/her] grandchildren?

1. YES	5. NO	8. DK	9. RF

GO TO T902_3 LOOP

***BEGINNING OF **BLOCK_2: SAME AMOUNT TO ALL CHILDREN**
      (N75bx/T902_2 - N75gx/T908_2)

T902_2
Q2444X
N75bx. Altogether, how much did [he/she] leave for [his/her] [child
      (grandchild)/children (grandchildren)]?

      [IWER: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE]

      [IWER: DO NOT PROBE DK/RF]

_____ OR _____ | DK | | RF |

T902_2	T903_2
AMOUNT	Q2445
	PERCENT

GO TO T168

T904_2
Q2447X
N75cx. Was it more than half of [his/her] estate?

1. YES	5. NO	8. DK	9. RF

GO TO T907_2   **GO TO T168**

T905_2
Q2448X
N75dx. Was it more than 75 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF

GO TO T168

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T906_2
Q2449X
N75ex. Was it more than 90 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF

GO TO T168

T907_2
Q2450X
N75fx. Was it more than 25 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF

GO TO T168   **GO TO T168**

T908_2
Q2451X
N75gx. Was it more than 10 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF

GO TO T168

***END OF **BLOCK_2**: SAME AMOUNT TO ALL CHILDREN (T902_2 - T908_2)

N76ax/T902_3 LOOP BRANCHPOINT: GO TO T168

BEGINNING OF T902_3 LOOP: ESTATE DISPERSAL TO EACH CHILD
T902_3 - T908_3 ARE ASKED FOR EACH CHILD

***BEGINNING OF **BLOCK_3: AMOUNT TO EACH CHILD**
(T902_3 - T908_3)

T902_3
Q2455X
N76ax. (Excluding any life insurance,) how much did [he/she] leave for
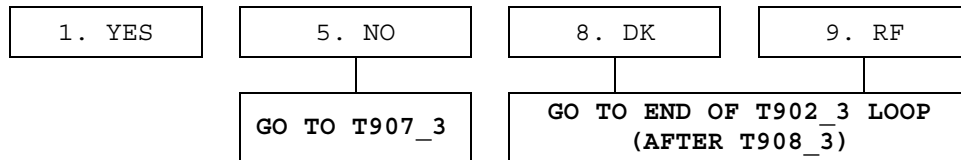CHILDn's NAME and (his/her) family?

    [IWER: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE]
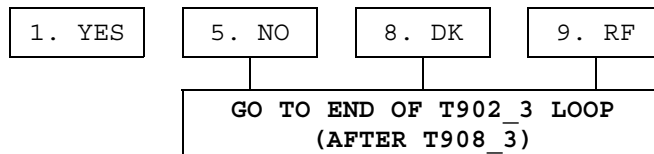
    [IWER: DO NOT PROBE DK/RF]

	OR		DK	RF
T902_3 AMOUNT		T903_3 Q2456 PERCENT		

GO TO END OF T902_3 LOOP (AFTER T908_3)
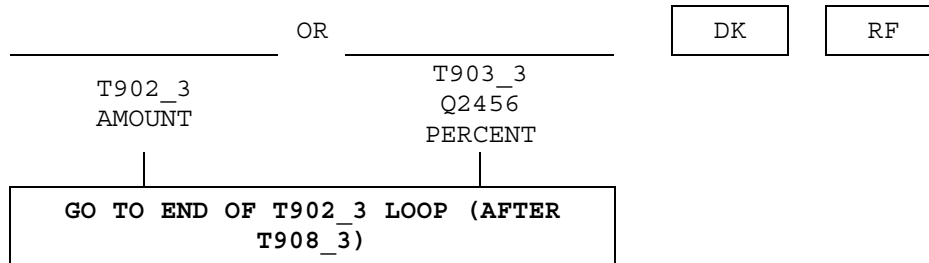
T904_3
Q2458X
N76bx. Was it more than half of [his/her] estate?

1. YES	5. NO	8. DK	9. RF
	GO TO T907_3	**GO TO END OF T902_3 LOOP (AFTER T908_3)**	

T905_3
Q2459X
N76cx. Was it more than 75 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF
	GO TO END OF T902_3 LOOP (AFTER T908_3)		

T906_3
Q2460X
N76dx. Was it more than 90 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF
	GO TO END OF T902_10 LOOP (AFTER T908_10)		
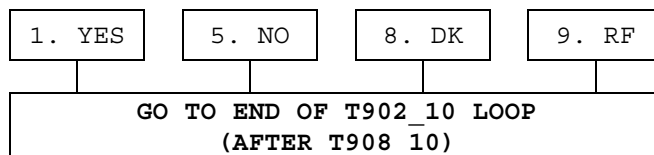
T907_3
Q2461X
N76ex. Was it more than 25 percent of [his/her] estate?

| 1. YES | 5. NO | 8. DK | 9. RF |

| GO TO END OF T902_3 LOOP (AFTER T908_3) | | GO TO END OF T902_3 LOOP (AFTER T908_3) |
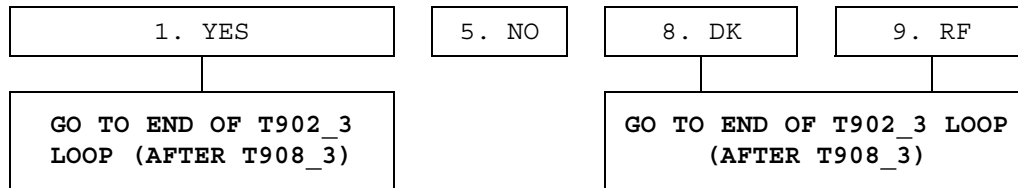
T908_3
Q2462X
N76fx. Was it more than 10 percent of [his/her] estate?

| 1. YES | 5. NO | 8. DK | 9. RF |

***END OF **BLOCK_3:** AMOUNT TO EACH CHILD (T902_3 - T908_3)

***END OF T902_3 LOOP: ESTATE DISPERSAL TO EACH CHILD*
IF THERE ARE NO MORE CHILDREN, CONTINUE ON TO T168. OTHERWISE, GO BACK TO BEGINNING OF T902_3 LOOP

T168
Q2465X
N77x. ((First I have some questions are about *R's FIRST NAME*'s assets and possessions, excluding any life insurance.)

   IF R HAD {A TRUST *and/or* A WILL} ({N71x/T155 *and* N72x/T156}=1 *or* N71x/T155=1 *or* N72x/T156=1):
   (Excluding any life insurance,) did [he/she] make provisions in [either the trust or the will/the trust/the will] for charities?

   OTHERWISE:
   (Excluding any life insurance,) were any of [his/her] possessions left to charities?

| 1. YES | 5. NO | 8. DK | 9. RF |

| | GO TO T169 | |

***BEGINNING OF **BLOCK_4: AMOUNT TO CHARITIES**
   (T902_4 - T908_4)

T902_4
Q2466X
N77ax. How much did charities receive from [his/her] estate?

     [IWER: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE]

     [IWER: DO NOT PROBE DK/RF]

_____	OR	_____		DK		RF
T902_4 . AMOUNT		T903_4 Q2467 PERCENT				

GO TO T169

T904_4
Q2469X
N77bx. Was it more than half of [his/her] estate?

1. YES		5. NO		8. DK		9. RF

GO TO T907_4   **GO TO T169**

T905_4
Q2470X
N77cx. Was it more than 75 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF

GO TO T169

T906_4
Q2471X
N77dx. Was it more than 90 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF

GO TO T169

T907_4
Q2472X
N77ex. Was it more than 25 percent of [his/her] estate?

1. YES		5. NO	8. DK	9. RF

GO TO T169   **GO TO T169**

T908_4
Q2473X
N77fx. Was it more than 10 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF

***END OF **BLOCK_4:** AMOUNT TO CHARITIES (N77ax/T902_4 - N77fx/T908_4)

T169
Q2475X
N78x. IF R HAD {A TRUST *and/or* A WILL} ({N71x/T155 *and* N72x/T156}=1 *or*
     N71x/T155=1 *or* N72x/T156=1):
     (Excluding any life insurance,) did [he/she] make provisions in [either
     the trust or the will/the trust/the will] for any of [his/her] brothers
     or sisters??

     OTHERWISE:
     (Excluding any life insurance,) were any of [his/her] possessions left
     to any of [his/her] brothers or sisters??
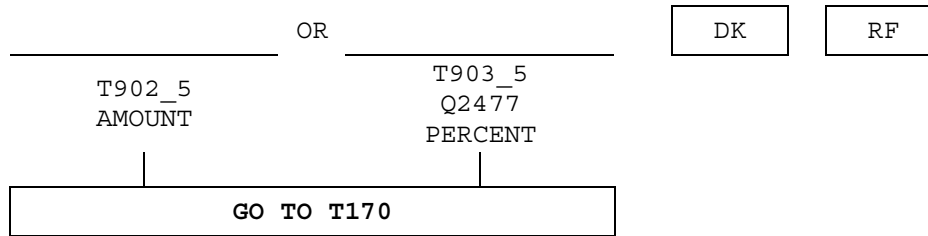
1. YES	5. NO	8. DK	9. RF

GO TO T170

***BEGINNING OF **BLOCK_5: AMOUNT TO SIBLINGS**
     (T902_5 - T908_5)

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T902_5
Q2476X
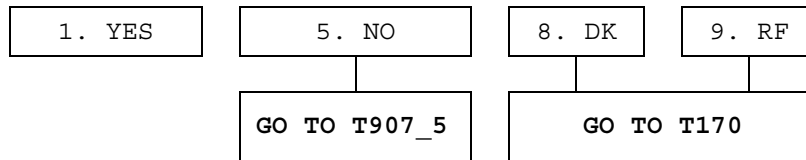N78ax. Altogether, how much did [his/her] brothers and sisters receive from
[his/her] estate?

[IWER: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE]
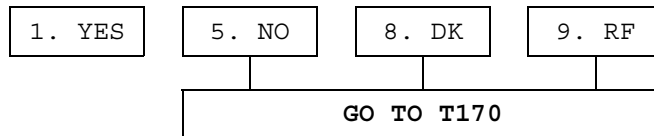
[IWER: DO NOT PROBE DK/RF]

	OR		DK	RF
T902_5 AMOUNT		T903_5 Q2477 PERCENT		

GO TO T170

T904_5
Q2479X
N78bx. Was it more than half of [his/her] estate?

1. YES	5. NO	8. DK	9. RF
	GO TO T907_5	**GO TO T170**	

T905_5
Q2480X
N78cx. Was it more than 75 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF
	GO TO T170		

T906_5
Q2481X
N78dx. Was it more than 90 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF
GO TO T170			
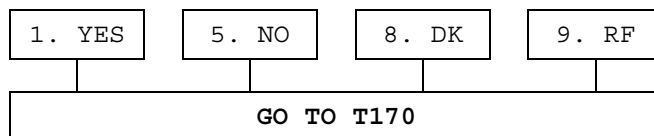
T907_5
Q2482X
N78ex. Was it more than 25 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF

GO TO T170   GO TO T170

T908_5
Q2483X
N78fx. Was it more than 10 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF

***END OF **BLOCK_5:** AMOUNT TO SIBLINGS (T902_5 - T908_5)

T170
Q2485X
N79x. IF R HAD {A TRUST *and/or* A WILL} ({N71x/T155 *and* N72x/T156}=1 *or*
      N71x/T155=1 *or* N72x/T156=1):
      (Excluding any life insurance,) did [he/she] make provisions in [either
      the trust or the will/the trust/the will] for any other of [his/her]
      relatives?

      OTHERWISE:
      (Excluding any life insurance,) were any of [his/her] possessions left
      to any other of [his/her] relatives?

1. YES	5. NO	8. DK	9. RF

GO TO T171

***BEGINNING OF **BLOCK_6: AMOUNT TO OTHER RELATIVES**
      (T902_6 - T908_6)

T902_6
Q2486X
N79ax. Altogether, how much did these other relatives receive from [his/her] estate?

>   [IWER: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE]

>   [IWER: DO NOT PROBE DK/RF]

| | OR | | DK | RF |

| T902_6 AMOUNT | | T903_6 Q2487 PERCENT |

GO TO T171

T904_6
Q2489X
N79bx. Was it more than half of [his/her] estate?

| 1. YES | 5. NO | 8. DK | 9. RF |

GO TO T907_6   **GO TO T171**

T905_6
Q2490X
N79cx. Was it more than 75 percent of [his/her] estate?

| 1. YES | 5. NO | 8. DK | 9. RF |

GO TO T171

T906_6
Q2491X
N79dx. Was it more than 90 percent of [his/her] estate?

| 1. YES | 5. NO | 8. DK | 9. RF |

GO TO T171

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T907_6
Q2492X
N79ex. Was it more than 25 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF

GO TO T171   **GO TO T171**

T908_6
Q2493X
N79fx. Was it more than 10 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF

***END OF **BLOCK_6:** AMOUNT TO OTHER RELATIVES (T902_6 - T908_6)

T171
Q2495X
N80x. IF R HAD {A TRUST *and/or* A WILL} ({N71x/T155 *and* N72x/T156}=1 *or*
      N71x/T155=1 or N72x/T156=1):
      (Excluding any life insurance,) did [he/she] make provisions in [either
      the trust or the will/the trust/the will] for any of [his/her] friends?

      OTHERWISE:
      (Excluding any life insurance,) were any of [his/her] possessions left
      to any of [his/her] friends?

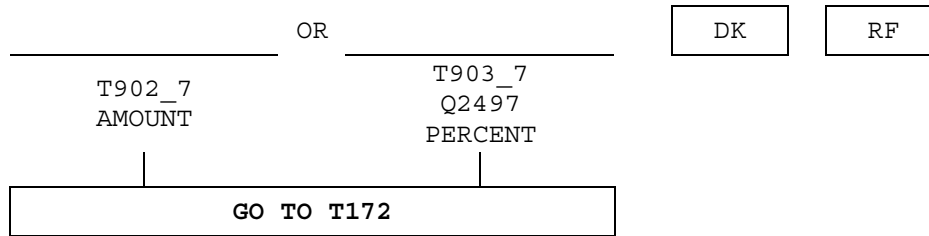| 1. YES	5. NO	8. DK	9. RF

GO TO T172

***BEGINNING OF **BLOCK_7: AMOUNT TO FRIENDS**
      (T902_7 - T908_7)

T902_7
Q2496X
N80ax. Altogether, how much did [his/her] friends receive from [his/her]
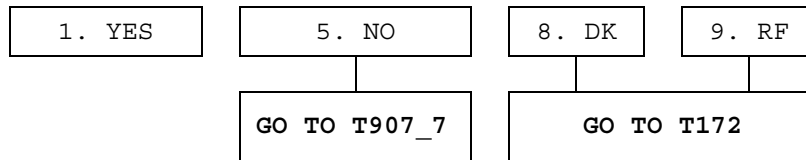estate?

[IWER: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE]
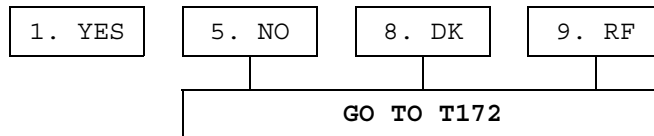
[IWER: DO NOT PROBE DK/RF]

	OR		DK	RF
T902_7 AMOUNT		T903_7 Q2497 PERCENT		

GO TO T172

T904_7
Q2499X
N80bx. Was it more than half of [his/her] estate?

1. YES	5. NO	8. DK	9. RF
	GO TO T907_7	**GO TO T172**	

T905_7
Q2500X
N80cx. Was it more than 75 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF
	GO TO T172		

T906_7
Q2501X
N80dx. Was it more than 90 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF
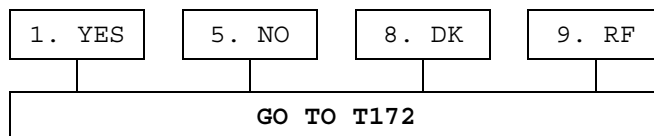
GO TO T172

T907_7
Q2502X
N80ex. Was it more than 25 percent of [his/her] estate?

1. YES		5. NO	8. DK	9. RF

GO TO T172 (under 1. YES)

GO TO T172 (under 8. DK / 9. RF)

T908_7
Q2503X
N80fx. Was it more than 10 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF

***END OF **BLOCK_7:** AMOUNT TO FRIENDS (T902_7 - T908_7)

T172
Q2505X
N81x. IF R HAD {A TRUST *and/or* A WILL} ({N71x/T155 *and* N72x/T156}=1 *or*
     N71x/T155=1 *or* N72x/T156=1):
     (Excluding any life insurance,) did [he/she] make provisions in [either
     the trust or the will/the trust/the will] for anyone else or anything
     else that we have not yet listed?

     OTHERWISE:
     (Excluding any life insurance,) were any of [his/her] possessions left
     to anyone else or anything else that we have not yet listed?

1. YES	5. NO	8. DK	9. RF

GO TO T173

***BEGINNING OF **BLOCK_8: AMOUNT TO OTHERS**
     (T902_8 - T908_8)

T902_8
Q2506X
N81ax. Altogether, how much did those others receive from [his/her] estate?

     [IWER: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE]

     [IWER: DO NOT PROBE DK/RF]

_____ OR	_____	DK	RF
T902_8 AMOUNT	T903_8 Q2507 PERCENT		

GO TO T173

T904_8
Q2509X
N81bx. Was it more than half of [his/her] estate?

1. YES	5. NO	8. DK	9. RF

GO TO T907_8 (5. NO)

GO TO T173 (8. DK / 9. RF)

T905_8
Q2510X
N81cx. Was it more than 75 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF

GO TO T173

T906_8
Q2511X
N81dx. Was it more than 90 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF

GO TO T173

T907_8
Q2512X
N81ex. Was it more than 25 percent of [his/her] estate?

1. YES		5. NO	8. DK	9. RF

GO TO T173   **GO TO T173**

T908_8
Q2513X
N81fx. Was it more than 10 percent of [his/her] estate?

1. YES	5. NO	8. DK	9. RF

***END OF **BLOCK_8: AMOUNT TO OTHERS** (T902_8 - T908_8)

*************** *END OF T163 ESTATE DISPERSAL LOOP.* *CONTINUE ON TO T173.*
*************** BEGIN TOTAL VALUE OF THE ESTATE ****************

T173
Q2514X
N82x. Excluding any life insurance, altogether, what was the value of
[his/her] total estate?

[IWER: DO NOT PROBE DK/RF]

	DK	RF

AMOUNT

GO TO T242

R2557. Did it amount to less than $100,000, more than $100,000, or what?	1. LESS THAN $100,000	3. ABOUT $100,000	5. MORE THAN $100,000	8. DK	9. RF
	GO TO R2560	**GO TO T242 BP**		**GO TO T242 BRANCHPOINT**	

R2558. Did it amount to less than $500,000, more than $500,000, or what?	1. LESS THAN $500,000	3. ABOUT $500,000	5. MORE THAN $500,000	8. DK	9. RF
	GO TO T242 BRANCHPOINT			**GO TO T242 BRANCHPOINT**	

R2559. Did it amount to less than $2,000,000, more than $2,000,000, or what?	1. LESS THAN $2Mil.	3. ABOUT $2Mil.	5. MORE THAN $2Mil.	8. DK	9. RF
	GO TO T242 BRANCHPOINT				

R2560. Did it amount to less than $25,000, more than $25,000, or what?	1. LESS THAN $25,000	3. ABOUT $25,000	5. MORE THAN $25,000	8. DK	9. RF
		GO TO T242 BRANCHPOINT			

R2561. Did it amount to less than $10,000, more than $10,000, or what?	1. LESS THAN $10,000	3. ABOUT $10,000	5. MORE THAN $10,000	8. DK	9. RF

**************** END SEQUENCE 2 ON ESTATE DISPOSITION *****************

**************** BEGIN SEQUENCE 3 ON TOTAL ESTATE VALUE *****************

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T242 BRANCHPOINT: IF (T173 = DK/RF AND T176 = DK/RF) or (PRELOAD VALUE FOR
                  PWT173 = DK/RF AND PWT176 = DK/RF) ##@@ ADD CONDITION HERE GO
                  TO END
```

ECBHOME

T242. IF R WAS A MOBILE HOME OR FARM OWNER or WAS PREVIOUS WAVE NON-FINANCIAL
R (Z850_PATH = 1):
At the time you spoke with us, you said the total value of R's estate
was about [T173 or Bracket value]. Would that have included the value
of [his/her] home?

OTHERWISE:
Does that include the value of [his/her] home?

1. YES	5. NO	8. DK	9. RF

END OF INTERVIEW

THANK THE RESPONDENT AND PROCEED TO THE ADDRESS UPDATE SCREENS. IF THE
DECEASED R'S SPOUSE/PARTNER IS THE PROXY, THEN UPDATE HIS/HER ADDRESS.

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