

HRS 2022 -- SECTION T: WILLS, INSURANCE AND TRUSTS  
COMMENTED VERSION -- 03/22/2022

\*\*\*\*\*

**\*\*\* NOTE FOR REVIEWERS \*\*\***

ALL CHANGES FOR THE 2022 WAVE INSTRUMENT ARE FLAGGED WITH  
#@ LOCATED ON THE RIGHT SIDE OF THE CHANGED ITEM OR SERIES.  
THUS, ALL CHANGES CAN BE LOCATED BY SEARCHING FOR #@ IN THE DESIGN  
CHANGE COMMENTS COLUMN.

CHANGES IN ITEMS THAT WERE IN THE 2020 INSTRUMENT APPEAR IN RED.

NEW QUESTIONS AND ASSOCIATED NEW BRANCHPOINTS, ETC., APPEAR IN  
BLUE SANDWICHED BETWEEN ROWS OF \*\*\*\*\*.

\*\*\*\*\*

**NOTE ABOUT BRANCHPOINTS:**

WHERE THERE IS MORE THAN ONE JUMP WITHIN A BRANCHPOINT BOX, THE  
JUMPS ARE TO BE APPLIED IN ORDER FROM THE TOP.

\*\*\*\*\*

**NOTE ABOUT COLORS:**

ALL TEXT IN TEAL IS SPECIFIC TO A WEB INTERVIEW.

ALL TEXT IN FUCHSIA IS SPECIFIC TO THE EXIT INTERVIEW.

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

\*\*\*\*\*

**NOTE ABOUT BOLD/UNDERLINE TEXT:**

ANY QUESTION THAT IS UNDERLINED IN THE B&A WILL APPEAR IN BOLD IN CAPI  
AND WILL BE UNDERLINED FOR CAWI.

\*\*\*\*\*

**NOTE ABOUT EXIT INTERVIEW Rs:**

ANY NEW SPOUSE/PARTNER THAT AN EXIT INTERVIEW R ACQUIRED SINCE HIS/HER LAST INTERVIEW IS IGNORED FOR THE PURPOSES OF THIS INTERVIEW. SIMILARLY, A SPOUSE/PARTNER WHO WAS REPORTED IN A PREVIOUS WAVE BUT WHO HAS NEVER BEEN INTERVIEWED WILL NOT HAVE AN EXIT INTERVIEW.

SINCE EXIT INTERVIEW Rs ARE REINTERVIEW Rs, QUESTIONS NOT ASKED OF REINTERVIEW Rs ALSO ARE NOT ASKED OF EXIT Rs, UNLESS OTHERWISE NOTED.

\*\*\*\*\*

#### NOTE ABOUT NON-RESPONSE FLOW:

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

\*\*\*\*\*

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

THIS IS A NEW EXIT R (HAS NEVER BEFORE BEEN INTERVIEWED AS AN EXIT R: = {R DIED SINCE LAST IW or {R WAS REPORTED DEAD AT A PREVIOUS IW BUT EXIT IW HAS NEVER BEEN DONE FOR THIS R = NOT A POST-EXIT IW}}) (A007=5 and {Z145 {NOT 1 and NOT 2 and NOT 3 and NOT 4}})

THIS IS A NEW POST-EXIT INTERVIEW (Z145=2);  
THIS IS A FIRST REPEAT POST-EXIT INTERVIEW (Z145=3);  
THIS IS A SECOND REPEAT POST-EXIT INTERVIEW (Z145=4)

THIS IS A SELF INTERVIEW (A009=1);  
THIS IS A PROXY INTERVIEW (A009={2 or 3}) or (A009 NOT 1);  
PROXY REPORTER IS SURVIVING SPOUSE (A009=2);  
PROXY REPORTER IS NON-SPOUSE (A009=3)

R IS MARRIED (X065=1);  
R IS PARTNERED (X065=3);  
R IS OTHER (SINGLE) (X065=6)

R WAS MARRIED AT HH's LAST IW (Preload\_X065=1);  
R WAS NOT COUPLED AT HH's LAST IW (Preload\_X065 {NOT 1 and NOT 3})

R WAS PARTNERED AT HH's LAST IW (Preload\_X065=3);  
R WAS SINGLE AT HH's LAST IW (Preload\_X065=6)

R WAS MARRIED WHEN S/HE DIED (A026=1)

R's LAST IW SPOUSE/PARTNER WAS LIVING WHEN S/HE DIED (A023=1);

R's LAST IW SPOUSE/PARTNER WAS NOT LIVING WHEN S/HE DIED (A023=5)

R's FIRST NAME (per X058)

HH's LAST IW MAIN RESIDENCE CITY (per X025), STATE (STATE ABBREVIATION)

(per X026);

HH's LAST IW 2ND RESIDENCE CITY (per X029), STATE (STATE ABBREVIATION)

(per X030)

R's LAST IW MONTH (per Z092), YEAR (per Z093)

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

NUMBER OF CHILDREN OR STEP-CHILDREN (per A101);

R HAS NO CHILDREN (A101=0)

R's Mother is Alive =X013=1 or F001=1

R's Father is Alive = X015=1 or F011=1

R's both parents are deceased (X013=5 AND X015=5) OR (F001 =5 AND F011 =5)

FOR FAMILY R, NUMBER OF GRANDCHILDREN FOR CORE FOR EXIT R (NOT POST-EXIT R) (per E046);

FOR FAMILY R, NUMBER OF GRANDCHILDREN NOT ASKED BECAUSE ASSUMED TO BE ZERO (E046=95);

FAMILY R HAS NO GRANDCHILDREN (E046 NOT {>0 - <81})

FOR NON-FAMILY R, NUMBER OF GRANDCHILDREN (per Z114)

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

R OWNED SECOND RESIDENCE AT HH's LAST IW (X032 = 1)

UNFOLDING ENTRY POINTS (Z087)

ASK ABOUT DISPOSITION OF HOME ONLY (Z146=1), POST-EXIT ONLY

ASK ABOUT WILL/TRUST ONLY (Z146=2), POST-EXIT ONLY

ASK ABOUT BOTH HOME AND WILL/TRUST (Z146=3), POST-EXIT ONLY

R DISCUSSED MEDICAL CARE ARRANGEMENTS WITH OTHERS Y/N (Z245) CORE ONLY

R HAS DURABLE POWER OF ATTORNEY OR LIVING WILL (Z275) CORE ONLY

-----

*\* A variable fieldname and code reference is shown at its first occurrence in the questionnaire, but in some cases, especially when it is common, is not shown after that.*

T001 BRANCHPOINT: IF THIS IS AN EXIT INTERVIEW, GO TO T101 BRANCHPOINT

## Wills

T001

Next we have some questions about wills, trusts and life insurance.

Do you currently have a will that is written and witnessed?

[INSTR: DO NOT INCLUDE LIVING WILLS. A LIVING WILL IS A TYPE OF HEALTH CARE ADVANCED DIRECTIVE THAT WE WILL ASK ABOUT SEPARATELY.]

1. YES, WILL
2. [VOL] YES, WILL AND TRUST
3. [VOL] NO WILL, BUT HAVE TRUST
5. NO WILL..... GO TO T011
- DK..... GO TO T011
- RF..... GO TO T011

Next we have some questions about wills, trusts and life insurance.

Do you currently have a will that is written and witnessed?

[INSTR: DO NOT INCLUDE LIVING WILLS. A LIVING WILL IS A TYPE OF HEALTH CARE ADVANCED DIRECTIVE THAT WE WILL ASK ABOUT SEPARATELY.]

1. YES, WILL ONLY
2. YES, BOTH WILL AND TRUST
3. NO, TRUST ONLY
5. NO, NEITHER WILL OR TRUST..... GO TO T011
- DK..... GO TO T011
- RF..... GO TO T011

T002

Have you made provisions in your [will/will or trust/trust] for any family members [other than your [husband/wife/partner/spouse]]?

- 1. YES
- 5. NO..... GO TO T008
- DK..... GO TO T008
- RF..... GO TO T008

T003 BRANCHPOINT: IF R DOES NOT HAVE CHILDREN OR STEP-CHILDREN (A101=0),  
GO TO T006 BRANCHPOINT

T003

Does that include any of your children or step-children?

- 1. YES
- 5. NO..... GO TO T006 BRANCHPOINT
- DK..... GO TO T006 BRANCHPOINT
- RF..... GO TO T006 BRANCHPOINT

T050\_T  
004M

(Which child is that?)

[INSTR: SELECT ALL THAT APPLY. IF R ONLY HAS ONE CHILD, SELECT THAT CHILD.]

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

- 3. THROUGH 52. CHILD NAME(S)  
[ROWS PROVIDED BY BLAISE AS NECESSARY]
- 93. ALL CHILDREN EQUALLY
- 96. ALL CHILDREN - "EQUALLY" NOT MENTIONED
- 98.DK
- 99.RF

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

Which child is that?

[INSTR: SELECT ALL THAT APPLY. IF YOU ONLY HAVE ONE CHILD, PLEASE SELECT THAT CHILD THEN "NEXT" TO CONTINUE.]

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

3. THROUGH 52. CHILD NAME(S)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

93. ALL CHILDREN EQUALLY

96. ALL CHILDREN

98.DK

99.RF

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

T005 BRANCHPOINT: IF R REPORTED THAT MADE PROVISION FOR ALL CHILDREN EQUALLY (T004=93), GO TO T006 BRANCHPOINT

#@ OP

(8/3/21)Added skip  
condition, 48443

IF IWER MADE ONLY 1 SELECTION AT T004 and SELECTION AT T004 WAS NOT 96 ('ALL CHILDREN — "EQUALLY" NOT MENTIONED'), GO TO T006 BRANCHPOINT

IF R HAS ONLY ONE CHILD AND T004=96, GO TO T006 BRANCHPOINT

IF THE NUMBER OF SELECTIONS IWER MADE AT T004 IS LESS THAN THE TOTAL  
NUMBER OF INDIVIDUAL CHILDREN LISTED AT T004, GO TO T006 BRANCHPOINT

T005

Does that document provide for all your children about equally?

1. YES

5. NO

8. DK

9. RF

T006 BRANCHPOINT: IF {THIS IS A FAMILY R WHO DID NOT REPORT THAT HAD GRANDCHILDREN (E046 NOT {>0 - <81}) or THIS IS A NON-FAMILY R WHO WAS NOT REPORTED IN A PREVIOUS WAVE TO HAVE GRANDCHILDREN (Z114 NOT {>0 - <81})}, GO TO T008

T006

Does that document include any grandchild directly?

- 1. YES
- 2. [VOL] ONLY THROUGH THEIR PARENTS
- 5. NO..... GO TO T008
- 8. DK..... GO TO T008
- 9. RF..... GO TO T008

Does that document include any grandchild directly?

- 1. YES
- 2. ONLY THROUGH THEIR PARENTS
- 5. NO..... GO TO T008
- 8. DK..... GO TO T008
- 9. RF..... GO TO T008

T051\_T  
007M

(Which of your children are the parents of those grandchildren?)

[INSTR: SELECT ALL THAT APPLY.]

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

- 3. THROUGH 52. CHILD NAME(S)  
[ROWS PROVIDED BY BLAISE AS NECESSARY]
- 92. UNLISTED CHILD WHO IS DECEASED
- 93. ALL CHILDREN
- DK
- RF

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

Which of your children are the parents of those grandchildren?

[INSTR: SELECT ALL THAT APPLY.]

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

- 3. THROUGH 52. CHILD NAME(S)  
[ROWS PROVIDED BY BLAISE AS NECESSARY]
- 92. UNLISTED CHILD WHO IS DECEASED
- 93. ALL CHILDREN
- DK
- RF

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

T008

Have you made provisions for any charities in your will or trust?

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

Have you made provisions for any charities in your will or trust?

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

**!! LIFE INSURANCE**

T011

Do you have any life insurance, including individual or group policies?

[INSTR: DO NOT INCLUDE BURIAL INSURANCE.]

- 1. YES
- 5. NO..... GO TO T036
- 8. DK..... GO TO T036
- 9. RF..... GO TO T036

Do you have any life insurance, including individual or group policies?

[INSTR: DO NOT INCLUDE BURIAL INSURANCE.]

- 1. YES
- 5. NO..... GO TO T036
- 8. DK..... GO TO T036
- 9. RF..... GO TO T036

T012



How many different life insurance policies do you have?

#@ OP (8/3/21)

Instruction change,  
48441

[INSTR: PLEASE INCLUDE INDIVIDUAL POLICIES, GROUP POLICIES, OR PAID-UP POLICIES.

IWER: If asked, read: "This refers to your own policies or accounts, not those of your spouse or partner." ]

- 1. ONE ☒
- 2. TWO
- 3. THREE
- 4. FOUR
- 5. FIVE OR MORE
- DK
- RF

How many different life insurance policies do you have?

#@ OP (8/3/21)

Instruction change  
for CAWI, #49319

[INSTR: PLEASE INCLUDE INDIVIDUAL POLICIES, GROUP POLICIES, OR PAID-UP POLICIES.

This refers to your own policies or accounts, not those of your spouse or partner.]

- 1. ONE ☒
- 2. TWO
- 3. THREE
- 4. FOUR
- 5. FIVE OR MORE
- DK
- RF

T013

IF R HAS ONLY ONE LIFE INSURANCE POLICY (T012=1):

What is the total face value of this policy, that is, the amount of money the beneficiary would get if you were to die?

OTHERWISE:

Altogether, what is the total face value of these policies, that is, the amount of money the beneficiary would get if you were to die?

[INSTR: DO NOT PROBE DK/RF.]

\$\_\_\_\_\_ .00 GO TO T017

- DK
- RF

IF R HAS ONLY ONE LIFE INSURANCE POLICY (T012=1):

What is the total face value of this policy, that is, the amount of money the beneficiary would get if you were to die?

OTHERWISE:

Altogether, what is the total face value of these policies, that is, the amount of money the beneficiary would get if you were to die?

\$ \_\_\_\_\_ .00 GO TO T017

DK

RF

T014-  
T016

T014-T016 Unfolding Sequence

(Thinking about the amount of money the beneficiary would get:)

Does it amount to less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURES: 3Up, 2Up1Down, 1Up2Down

BREAKPOINTS: **\$2,500, \$25,000, \$50,000**, \$250,000

RANDOM ENTRY POINTS: \$2,500, \$25,000, \$50,000

ENTRY POINT ASSIGNMENT 1 or 2 or {NOT 1 and NOT 2} AT Z087

ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

T014-T016 Unfolding Sequence

Thinking about the amount of money the beneficiary would get:

Does it amount to less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURES: 3Up, 2Up1Down, 1Up2Down

BREAKPOINTS: **\$2,500, \$25,000, \$50,000**, \$250,000

RANDOM ENTRY POINTS: \$2,500, \$25,000, \$50,000

ENTRY POINT ASSIGNMENT 1 or 2 or {NOT 1 and NOT 2} AT Z087

ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

T052\_T  
017M

IF R HAS ONLY ONE LIFE INSURANCE POLICY (T012=1):

Who are the beneficiaries of this policy?

OTHERWISE:

Who are the beneficiaries of these policies?

IF GRANDCHILD:

(Which of your children ~~is~~ are the parents of those grandchildren?)

[INSTR: SELECT ALL THAT APPLY.]

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

3. THROUGH 52. CHILD NAME(S)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

91. R'S SPOUSE/PARTNER [ONLY DISPLAY IF R IS MARRIED/PARTNERED]

92. UNLISTED CHILD WHO IS DECEASED

93. ALL CHILDREN

94. ALL GRANDCHILDREN EQUALLY

97. OTHER (SPECIFY) \_\_\_\_\_ [T045]

DK

RF

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

IF R HAS ONLY ONE LIFE INSURANCE POLICY (T012=1):

Who are the beneficiaries of this policy?

OTHERWISE:

Who are the beneficiaries of these policies?

IF GRANDCHILD:

Which child is the parent of that grandchild?

[INSTR: SELECT ALL THAT APPLY.]

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

3. THROUGH 52. CHILD NAME(S)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

91. -MY SPOUSE OR PARTNER [ONLY DISPLAY IF R IS MARRIED/PARTNERED]

92. UNLISTED CHILD WHO IS DECEASED

93. ALL CHILDREN

94. ALL GRANDCHILDREN EQUALLY

97. OTHER (SPECIFY) \_\_\_\_\_ [T045]

DK

RF

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

T018

[Is this a life insurance policy that builds/Are any of these life insurance policies ones that build] up a cash value that you can borrow against, or that you would receive if the policy were to be cancelled?

DEFINITION: "Policies that build up a cash value" are sometimes called 'whole life' or 'straight life policies.'

1. YES

5. NO ..... GO TO T031

8. DK ..... GO TO T031

9. RF ..... GO TO T031

T019 BRANCHPOINT: IF R HAS ONLY ONE LIFE INSURANCE POLICY (T012=1), GO TO T024

T019

(How many such policies do you have?)

- 1. ONE ☒
- 2. TWO
- 3. THREE
- 4. FOUR
- 5. FIVE OR MORE
- DK
- RF

How many such policies do you have?

- 1. ONE ☒
- 2. TWO
- 3. THREE
- 4. FOUR
- 5. FIVE OR MORE
- DK
- RF

T020

What is the current face value of [these policies/this policy]?

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_.00 GO TO T024

DK  
RF

What is the current face value of [these policies/this policy]?

\$ \_\_\_\_\_.00 GO TO T024

DK  
RF

T021-  
T023

T021-T023 Unfolding Sequence

(Thinking about the value of [these policies/this policy]:)

Does it amount to less than \$\_\_\_\_, more than \$\_\_\_\_, or what?

PROCEDURES: 3Up, 2Up1Down, 1Up2Down

BREAKPOINTS: **\$2,500, \$25,000, \$50,000**, \$250,000

RANDOM ENTRY POINTS: \$2,500, \$25,000, \$50,000

ENTRY POINT ASSIGNMENT 1 or 2 or {NOT 1 and NOT 2} AT Z087

ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

T021-T023 Unfolding Sequence

Thinking about the value of [these policies/this policy]:

Does it amount to less than \$\_\_\_\_ , more than \$\_\_\_\_ , or what?

PROCEDURES: 3Up, 2Up1Down, 1Up2Down

BREAKPOINTS: **\$2,500, \$25,000, \$50,000**, \$250,000

RANDOM ENTRY POINTS: \$2,500, \$25,000, \$50,000

ENTRY POINT ASSIGNMENT 1 or 2 or {NOT 1 and NOT 2} AT Z087

ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

T024

IF R HAS ONLY ONE LIFE INSURANCE POLICY (T019=1):

(Altogether,) about how much in total do you pay for this policy each month or year?

OTHERWISE:

(Altogether,) about how much in total do you pay for these policies each month or year?

[INSTR: ENTER "0" IF POLICY IS PAID UP OR THERE ARE NO PREMIUM PAYMENTS.]

DO NOT PROBE DK/RF

\$ \_\_\_\_\_.00 GO TO T025

0 NO PREMIUM PAYMENTS ..... GO TO T029 BRANCHPOINT

DK

RF

PER (T025)

1. MONTH

2. YEAR

DK

RF

IF R HAS ONLY ONE LIFE INSURANCE POLICY (T019=1):

Altogether, about how much in total do you pay for this policy each month or year?

OTHERWISE:

Altogether, about how much in total do you pay for these policies each month or year?

[INSTR: ENTER "0" IF POLICY IS PAID UP OR THERE ARE NO PREMIUM PAYMENTS.]

\$ \_\_\_\_\_.00 GO TO T025

PER (T025)

1. MONTH

2. YEAR

DK

RF

T026-  
T028

T026-T028 Unfolding Sequence

(Thinking about how much you pay for [these policies/this policy]:)

Does it amount to less than \$\_\_\_\_ per month, more than \$\_\_\_\_ per month, or what?

PROCEDURES: 2Up2Down, 1Up3Down

BREAKPOINTS: \$20, \$50, **\$100, \$200**, \$400

RANDOM ENTRY POINTS: \$100, \$200

ENTRY POINT ASSIGNMENT 1 or {NOT 1} AT X501

ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

T026-T028 Unfolding Sequence

Thinking about how much you pay for [these policies/this policy]:

Does it amount to less than \$\_\_\_\_ per month, more than \$\_\_\_\_ per month, or what?

PROCEDURES: 2Up2Down, 1Up3Down

BREAKPOINTS: \$20, \$50, **\$100, \$200**, \$400

RANDOM ENTRY POINTS: \$100, \$200

ENTRY POINT ASSIGNMENT 1 or {NOT 1} AT X501

ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

T025

IF R HAS ONLY ONE LIFE INSURANCE POLICY (T019=1):

(Altogether,) about how much in total do you pay for this policy each month or year?

OTHERWISE:

(Altogether,) about how much in total do you pay for these policies each month or year?

[INSTR: ENTER "0" IF POLICY IS PAID UP OR THERE ARE NO PREMIUM PAYMENTS.]

PER:

1. MONTH ☐

2. YEAR

DK

RF

IF R HAS ONLY ONE LIFE INSURANCE POLICY (T019=1):

Altogether, about how much in total do you pay for this policy each month or year?

OTHERWISE:

Altogether, about how much in total do you pay for these policies each month or year?

[INSTR: ENTER "0" IF POLICY IS PAID UP OR THERE ARE NO PREMIUM PAYMENTS.]

PER:

1. MONTH

2. YEAR

DK

RF

T029 BRANCHPOINT: IF R HAS ONLY ONE LIFE INSURANCE POLICY (T012=1), GO TO T031

T053\_T  
029M



IF R HAS ONLY ONE LIFE INSURANCE POLICY (T019=1):

Who are the beneficiaries of this policy?

OTHERWISE:

Who are the beneficiaries of these policies?

[INSTR: SELECT ALL THAT APPLY.]

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

3. THROUGH 52. CHILD NAME(S)

91. R'S SPOUSE/PARTNER

92. UNLISTED CHILD WHO IS DECEASED

93. ALL CHILDREN

94. ALL GRANDCHILDREN

97. OTHER (SPECIFY) \_\_\_\_\_ [T030]

DK

RF

IF R HAS ONLY ONE LIFE INSURANCE POLICY (T019=1):

Who are the beneficiaries of this policy?

OTHERWISE:

Who are the beneficiaries of these policies?

[INSTR: SELECT ALL THAT APPLY.]

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

3. THROUGH 52. CHILD NAME(S)

91. MY SPOUSE OR PARTNER

92. UNLISTED CHILD WHO IS DECEASED

93. ALL CHILDREN

94. ALL GRANDCHILDREN

97. OTHER (SPECIFY) \_\_\_\_\_ [T030]

DK

RF

**!! NEW LIFE INSURANCE**

T031

[Since R's LAST IW MONTH, YEAR/In the last 2 years], have you obtained any new life insurance policies?

1. YES

5. NO..... GO TO T036

DK..... GO TO T036

RF..... GO TO T036

T032

What is the total face value of (this policy/all of these policies)?

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_.00 GO TO T036

DK

RF

What is the total face value of (this policy/all of these policies)?

\$ \_\_\_\_\_.00 GO TO T036

DK

RF

T033-  
T035

T033-T035 Unfolding Sequence

(Thinking about the face value of (this policy/these policies):)

Does it amount to less than \$\_\_\_\_, more than \$\_\_\_\_, or what?

PROCEDURE: 2Up1Down

BREAKPOINTS: \$2,500, **\$25,000**, \$50,000, \$250,000

ENTRY POINT: \$25,000

T033-T035 Unfolding Sequence

Thinking about the face value of (this policy/these policies):

Does it amount to less than \$\_\_\_\_, more than \$\_\_\_\_, or what?

PROCEDURE: 2Up1Down

BREAKPOINTS: \$2,500, **\$25,000**, \$50,000, \$250,000

ENTRY POINT: \$25,000

**!! LAPSED LIFE INSURANCE**

T036

[Since R's LAST IW MONTH, YEAR/In the last 2 years], have you allowed any life insurance policies to lapse or have any been cancelled?

1. YES

5. NO..... GO TO T252 BRANCHPOINT

DK..... GO TO T252 BRANCHPOINT

RF..... GO TO T252 BRANCHPOINT

T037

What was the total face value of (this policy/all of these policies)?

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_.00 GO TO T041

DK

RF

What was the total face value of (this policy/all of these policies)?

\$ \_\_\_\_\_.00 GO TO T041

DK

RF

T038-  
T040

T038-T040 Unfolding Sequence

(Thinking about the total face value of the lapsed (policy/policies):)

Does it amount to less than \$\_\_\_\_, more than \$\_\_\_\_, or what?

PROCEDURE: 1Up2Down

BREAKPOINTS: \$2,500, \$25,000, **\$50,000**, \$250,000

ENTRY POINT: \$50,000

T038-T040 Unfolding Sequence

Thinking about the total face value of the lapsed (policy/policies):

Does it amount to less than \$\_\_\_\_, more than \$\_\_\_\_, or what?

PROCEDURE: 1Up2Down

BREAKPOINTS: \$2,500, \$25,000, **\$50,000**, \$250,000

ENTRY POINT: \$50,000

T041

Was this lapse or cancellation something you chose to do, or was it done by the provider, your employer, or someone else?

1. R'S CHOICE

2. PROVIDER/EMPLOYER/ SOMEONE ELSE CHOSE..... GO TO T252

BRANCHPOINT,

DK

RF

Was this lapse or cancellation something you chose to do, or was it done by the provider, your employer, or someone else?

- 1. MY CHOICE
  - 2. PROVIDER OR EMPLOYER OR SOMEONE ELSE CHOSE ..... GO TO T252
- BRANCHPOINT
- DK
- RF

T042

Was it because the policy was too expensive, because you did not need the coverage or some other reason?

- 1. ~~TOO~~ EXPENSIVE
  - 2. ~~CO~~VERAGE NOT NEEDED
  - 3. GOT NEW POLICY
  - 4. TOOK THE CASH OUT
  - 7. OTHER (SPECIFY) \_\_\_\_\_ [T048]
- DK
- RF

Was it because the policy was too expensive, because you did not need the coverage or some other reason?

- 1. TOO EXPENSIVE
  - 2. COVERAGE NOT NEEDED
  - 3. GOT NEW POLICY
  - 4. TOOK THE CASH OUT
  - 7. OTHER (SPECIFY) \_\_\_\_\_ [T048]
- DK
- RF

T043

Did you receive any cash when the policy was cancelled or allowed to lapse?

- 1. YES
- 5. NO..... GO TO T252 BRANCHPOINT
- DK..... GO TO T252 BRANCHPOINT
- RF..... GO TO T252 BRANCHPOINT

T044

About how much cash did you receive?

\$ \_\_\_\_\_ .00

- ☐
- DK
- RF

## End of Life Decisions

T252 BRANCHPOINT: IF R IS LESS THAN 65 YEARS (A019<65), GO TO T254  
BRANCHPOINT

T252

Now we would like to ask you some questions about healthcare decisions that might need to be made for you in the future, if you are unable to make them yourself.

[INSTR: PRESS 1 TO CONTINUE.]

1. CONTINUE

*NOTE: '1. CONTINUE' IS ONLY ACCEPTABLE RESPONSE.*

Now we would like to ask you some questions about healthcare decisions that might need to be made for you in the future, if you are unable to make them yourself.

[INSTR: SELECT "NEXT" TO CONTINUE.]

T245 BRANCHPOINT: IF R REPORTED IN PRIOR WAVE THAT THEY HAD  
DISCUSSED FUTURE MEDICAL CARE WITH SOMEONE ELSE (Z274=1), GO TO T246

T245

People sometimes make plans about the types of care or medical treatment they would want or not want, if they were to become seriously ill.

Have you ever discussed with anyone the care or medical treatment you would want to receive if you were to become seriously ill in the future?

1. YES

5. NO

DK

RF

T246

IF PROXY IW OR R DID NOT REPORT HAVING DPOA IN PRIOR WAVE

(Z275\_CareArrangements = 2 or 5):

Have you made any legal arrangements for a specific person or persons to make decisions about your care or medical treatment if you cannot make those decisions yourself? This is sometimes called a "Durable Power of Attorney for Health Care".

OTHERWISE:

Last time we spoke with you, in [PREV WAVE MONTH,YEAR] you told us that you have a legal arrangement for a specific person or persons to make decisions about your care or medical treatment if you cannot make those decisions yourself. This is sometimes called a 'Durable Power of Attorney for Health Care'.

Do you still have this arrangement in place?

1.YES

5.NO

DK..... GO TO T250

RF..... GO TO T250

*NOTE: THE RESPONSES BELOW ARE ONLY SHOWN IF R REPORTED  
ARRANGEMENT IN PREV WAVE (Z274=1)*

1. YES

2. YES, BUT ARRANGEMENT HAS CHANGED [VOL]

3. DISPUTES PREVIOUS WAVE RECORD, BUT NOW HAS ARRANGEMENT [VOL]

4. DISPUTES PREVIOUS WAVE RECORD, DOES NOT HAVE ARRANGEMENT

[VOL]..... GO TO T250

5. NO, I DON'T HAVE IT ANYMORE..... GO TO T250

DK..... GO TO T250

RF ..... GO TO T250

- 1.YES
- 5.NO
- DK..... GO TO T250
- RF..... GO TO T250

*NOTE: THE RESPONSES BELOW ARE ONLY SHOWN IF R REPORTED  
ARRANGEMENT IN PREV WAVE (Z274=1)*

- 1. YES, I STILL HAVE SAME ARRANGEMENT
- 2. YES, BUT ARRANGEMENT HAS CHANGED
- 3. YES, I DO HAVE THIS ARRANGEMENT NOW BUT DID NOT HAVE IT LAST TIME
- 4. NO, I DO NOT HAVE SUCH AN ARRANGEMENT NOW AND DID NOT HAVE IT  
LAST TIME..... GO TO T250
- 5. NO, I DON'T HAVE IT ANYMORE..... GO TO T250
- 8. DK..... GO TO T250
- 9. RF..... GO TO T250

T247M

#@ OP 8/23/21 drop  
the "or child-in-law"  
from the code 4 text  
#48470

Who has that authority, (that is, what is their relationship to you)?

[INSTR: SELECT ALL THAT APPLY.]

- 3. SPOUSE OR PARTNER
- 4. CHILD, ~~CHILD-IN-LAW~~ OR GRANDCHILD ..... GO TO T248
- 5. OTHER RELATIVE
- 6. FRIEND
- 7. PHYSICIAN OR HEALTHCARE PROFESSIONAL
- 8. MINISTER, RABBI, PRIEST OR RELIGIOUS ADVISOR
- 9. ATTORNEY
- 10. SOCIAL WORKER
- 97. OTHER (SPECIFY) \_\_\_\_\_ (T249)
- DK
- RF

Who has that authority, that is, what is their relationship to you?

[INSTR: SELECT ALL THAT APPLY.]

3. MY SPOUSE OR PARTNER

4. CHILD, ~~CHILD-IN-LAW~~ OR GRANDCHILD ..... GO TO T248

5. OTHER RELATIVE

6. FRIEND

7. PHYSICIAN OR HEALTHCARE PROFESSIONAL

8. MINISTER, RABBI, PRIEST OR RELIGIOUS ADVISOR

9. ATTORNEY

10. SOCIAL WORKER

97. OTHER (SPECIFY) \_\_\_\_\_ (T249)

DK

RF

T248 BRANCHPOINT: IF R DID NOT ANSWER CHILD/GRANDCHILD TO WHO HAS THAT AUTHORITY (T247 NOT 4), GO TO T250

T248/T  
066\_T2  
48

(Which child was that?)

IF GRANDCHILD:

(Which child is the parent of that grandchild?)

[INSTR: SELECT ALL THAT APPLY.]

CHILD NAME(S)

[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]

3. THROUGH 52. CHILD NAME(S)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

92. UNLISTED CHILD WHO IS DECEASED

93. ALL CHILDREN

97. OTHER (SPECIFY) \_\_\_\_\_ (T253)

98. DK

99. RF

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



Which child was that?

IF GRANDCHILD:

Which child is the parent of that grandchild?

[INSTR: SELECT ALL THAT APPLY.]

CHILD NAME(S)

[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]

3. THROUGH 52. CHILD NAME(S)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

92. UNLISTED CHILD WHO IS DECEASED

93. ALL CHILDREN

97. OTHER (SPECIFY) \_\_\_\_\_ (T253)

98. DK

99. RF

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

T250

IF PROXY IW OR R DID NOT REPORT HAVING A LIVING WILL AT PRIOR WAVE (Z275\_CareArrangements=1 or 5): Have you provided written instructions about the care or medical treatment that you want to receive if you cannot make those decisions yourself? This is sometimes called a "Living Will" or "Physician Orders for Life Sustaining Treatment".

OTHERWISE:

Last time we spoke with you, in [PREV WAVE MONTH,YEAR] you told us that you have written instructions about the care or medical treatment that you want to receive if you cannot make those decisions yourself. This is sometimes called a "Living Will" or "Physician Orders for Life Sustaining Treatment".

Do you still have this arrangement in place?

[INSTR: "PHYSICIAN ORDERS FOR LIFE SUSTAINING TREATMENT" ARE SOMETIMES CALLED POLST. ANOTHER NAME FOR THE SAME ARRANGEMENT IS MOLST WHICH STANDS FOR "MEDICAL ORDERS FOR LIFE SUSTAINING TREATMENT".]

1. YES
5. NO..... GO TO T047 (T ASSIST)

#@ OP 12/01/21  
change the code 4  
text #49316

*NOTE: THE RESPONSES BELOW ARE ONLY SHOWN FOR "OTHERWISE" (Z275=2 or 3)*

1. YES
2. YES, BUT ARRANGEMENT HAS CHANGED [VOL]
3. DISPUTES PREVIOUS WAVE RECORD, BUT NOW HAS ARRANGEMENT [VOL]
4. DISPUTES PREVIOUS WAVE RECORD, DOES NOT HAVE ARRANGEMENT [VOL]..... GO TO T047 (T ASSIST)
5. NO , ~~I DON'T~~ NO LONGER HAVE IT ~~ANYMORE~~..... GO TO T047\_(T ASSIST)
8. DK..... GO TO T047 (T ASSIST)
9. RF..... GO TO T047 (T ASSIST)

1. YES
5. NO..... GO TO T047 (T ASSIST)
- DK..... GO TO T047 (T ASSIST)
- RF..... GO TO T047 (T ASSIST)

#@ OP 12/01/21  
change the code 4  
text #49316

*NOTE: THE RESPONSES BELOW ARE ONLY SHOWN IF R REPORTED ARRANGEMENT IN PREV WAVE (Z275=3 or 3)*

1. YES, I STILL HAVE SAME ARRANGEMENT
2. YES, BUT ARRANGEMENT HAS CHANGED
3. YES, I DO HAVE THIS ARRANGEMENT NOW BUT DID NOT HAVE IT LAST TIME
4. NO, I DO NOT HAVE SUCH AN ARRANGEMENT NOW AND DID NOT HAVE IT LAST TIME..... GO TO T047 (T ASSIST)
5. NO, ~~I DON'T~~ NO LONGER HAVE IT ~~ANYMORE~~..... GO TO T047 (T ASSIST)
8. DK ..... GO TO T047 (T ASSIST)
9. RF..... GO TO T047 (T ASSIST)

T251

Do these instructions express a desire to limit the care or medical treatment that you receive in certain situations?

1. YES
5. NO
- DK
- RF

T254 BRANCHPOINT: IF BOTH OF RS PARENTS ARE DECEASED ((X013=5 AND X015=5) OR (F001 IS ASKED AND =5 AND F011 IS ASKED AND =5)) , GO TO T047 BRANCHPOINT

T254

We are also interested in arrangements your [mother/father/parents] may have made regarding [her/his/their] future medical care.

[INSTR: SELECT "1" TO CONTINUE]

We are also interested in arrangements your [mother/father/parents] may have made regarding [her/his/their] future medical care.

[INSTR: SELECT "NEXT" TO CONTINUE]

1. CONTINUE

T255 BRANCHPOINT: If mother is alive [X013 = 1 and F001 = 1] continue, else go to T257 BRANCHPOINT

T255

IF R IS UNDER AGE 65 [A019<65]:

Has your mother made any legal arrangements for a specific person or persons to make decisions about her care or medical treatment if she cannot make those decisions herself? This is sometimes called a "Durable Power of Attorney for Health Care".

OTHERWISE (R AGE 65 OR OLDER)[A019 >65]:

Does your mother have a Durable Power of Attorney for Health Care?

1. YES

5. NO .....GO TO T257 BRANCHPOINT

T256

Who is that -- what is that person's relationship to your mother?

[INSTR: CHECK ALL THAT APPLY.]

[INSTR: IF R SAYS "CHILD", PROBE TO DETERMINE WHETHER THAT CHILD IS THE RESPONDENT OR RESPONDENT'S SIBLING OR BOTH.]

Who is that -- what is that person's relationship to your mother?

[INSTR: SELECT ALL THAT APPLY.]

1. Mother's spouse/partner
2. Child – R
3. Child – Sibling of R
4. Other person

1. Her spouse or partner
2. Me
3. One of my siblings
4. Other person

T257 BRANCHPOINT: If father is alive [X015 = 1 and F011 = 1] continue, else go to T047 BRANCHPOINT (TAssist)

T257

IF R IS LESS THAN 65 YEARS OF AGE AND MOTHER NOT ALIVE (X013=5 OR F001=5) (i.e., did not get T255):

Has your father made any legal arrangements for a specific person or persons to make decisions about his care or medical treatment if he cannot make those decisions himself? This is sometimes called a "Durable Power of Attorney for Health Care".

Does your father have a durable power of attorney for health care?

OTHERWISE R >= 65 OR ( R < 65 AND MOTHER ALIVE (X013 NOT 5 AND F001=1)) (i.e., got T255):

Does your father have a Durable Power of Attorney for Health Care?

1. Yes
5. No ... GO TO T047 BRANCHPOINT (TAssist)

T258

Who is that -- what is that person's relationship to your father?

[INSTR: CHECK ALL THAT APPLY.]

[INSTR: IF R SAYS "CHILD", PROBE TO DETERMINE WHETHER THAT CHILD IS THE RESPONDENT OR RESPONDENT'S SIBLING OR BOTH.]

Who is that -- what is that person's relationship to your father?

[INSTR: SELECT ALL THAT APPLY.]

1. Father's spouse/partner
2. Child – R
3. Child – Sibling of R
4. Other person
1. His spouse or partner
2. Me
3. One of my siblings
4. Other person

T047 BRANCHPOINT: ASK IF THIS IS NOT A CAWI INTERVIEW, ELSE GO TO T101  
BRANCHPOINT

T047

T ASSIST

[INSTR: HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN  
SECTION T - WILLS AND TRUSTS?]

1. NEVER
2. A FEW TIMES
3. MOST OR ALL OF THE TIME
4. THE SECTION WAS DONE BY A PROXY REPORTER

T101 BRANCHPOINT: IF THIS IS NOT AN EXIT INTERVIEW, GO TO MODULES

IF THIS IS A POST-EXIT INTERVIEW (Z145={2 or 3 or 4}) and WE DON'T NEED TO  
ASK ABOUT THE HOME DISPOSITION (Z146 {NOT 1 and NOT 3}), GO TO T155  
BRANCHPOINT

IF THIS IS NOT A POST-EXIT IW (Z145 {NOT 2 and NOT 3 and NOT 4})) and R DID  
NOT OWN RESIDENCE/MOBILE HOME/FARM IN HH's LAST IW (X079 NOT 1), GO  
TO T124 BRANCHPOINT

T101

IF {R's LAST IW SPOUSE/PARTNER WAS NOT LIVING WHEN S/HE DIED (A023 NOT 1) and PROXY IS NOT A SURVIVING SPOUSE/PARTNER (A009 NOT 2)} or R {WAS REMARRIED WHEN S/HE DIED (A026=1) and WAS NOT COUPLED AT HH's LAST IW (X066Preload\_X065 {NOT 1 and NOT 3}):

Our records show that R's FIRST NAME (per X058) owned a home in HH's LAST IW 1ST RESIDENCE CITY (X025), STATE (STATE ABBREVIATION) (X026) in [FINANCIAL R's LAST IW [MONTH (per X092X038), ]YEAR (per X093X038)/the last two years].

IF R WAS MARRIED/PARTNERED HH's LAST IW (X066Preload\_X065={1 or 3}) and PROXY IS R's SURVIVING SPOUSE/PARTNER (A009=2):

Our records show that you and R's FIRST NAME owned a home in HH's LAST IW 1ST RESIDENCE CITY, STATE (STATE ABBREVIATION) in [FINANCIAL R's LAST IW [MONTH, ]YEAR/the last two years].

OTHERWISE, IF {THIS IS NOT A POST-EXIT AND R's LAST IW SPOUSE/PARTNER WAS LIVING WHEN S/HE DIED (A023=1) and PROXY IS NOT A SURVIVING SPOUSE/PARTNER (A009 NOT 2)}:

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 (STATE ABBREVIATION) in [FINANCIAL R's LAST IW [MONTH, ]YEAR/the last two years].

ASK ALL PROXIES:

Please, let me confirm, did R's FIRST NAME still own that home when [he/she] (died/passed away)?

1. YES..... GO TO T111
2. [VOL] RECORDS INCORRECT
5. NO
- DK..... GO TO T124 BRANCHPOINT
- RF..... GO TO T124 BRANCHPOINT

**!! EXIT NO 1st HOME AT DEATH**

T066

Did R's FIRST NAME ever own it?

1. YES
5. NO..... GO TO T124 BRANCHPOINT
- DK..... GO TO T124 BRANCHPOINT
- RF..... GO TO T124 BRANCHPOINT

T102

What happened to that home - did R's FIRST NAME sell it, give it to someone, or what?

1. GAVE TO SOMEONE
2. SOLD ..... GO TO T107
7. OTHER (SPECIFY)\_\_\_\_\_ [T103] GO TO T124 BRANCHPOINT
- DK..... GO TO T124 BRANCHPOINT
- RF..... GO TO T124 BRANCHPOINT

T104

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

[INSTR: SELECT ALL THAT APPLY.]

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

T105 BRANCHPOINT: IF PROXY DID NOT REPORT THAT R GAVE THE HOUSE TO A CHILD/GRANDCHILD (T104 {NOT 2 and NOT 6}), GO TO T107

T054\_T  
105M

IF CHILD (T104=2):  
(Which child is that?)

IF GRANDCHILD (T104={6 and {NOT 2}}):  
Which child is the parent of that grandchild?

[INSTR: SELECT ALL THAT APPLY.]

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

3. THROUGH 52. CHILD NAME(S)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

92. UNLISTED CHILD WHO IS DECEASED

93. ALL CHILDREN

97. OTHER (SPECIFY)\_\_\_\_\_ [T106]

DK

RF

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

T107

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?

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_ .00 GO TO T124 BRANCHPOINT

DK

RF

T108-  
T110



## T108-T110 Unfolding Sequence

(Thinking about the [if T102=2: selling price/ otherwise: value] of that house:)

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

PROCEDURES: 1Up1Down, 2Down

BREAKPOINTS: \$15,000, **\$50,000**, **\$200,000**

RANDOM ENTRY POINTS: \$50,000, \$200,000

ENTRY POINT ASSIGNMENT 1 or {NOT 1} AT X502

ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

**T111 BRANCHPOINT: GO TO T124 BRANCHPOINT**

**!! EXIT 1st HOME DISPOSAL AFTER DEATH**

T111

What happened to that home after R's FIRST NAME's death:

IF PROXY IS THE SURVIVING SPOUSE/PARTNER (A009=2):

Do you own it now, was it sold, was it inherited by someone else, has it not yet been disposed of, or what?

IF {THIS IS NOT A POST-EXIT AND PROXY IS NOT R's SPOUSE/PARTNER AND R's SPOUSE/PARTNER IS STILL LIVING} (A023=1):

Does [his/her] [husband/wife/partner] own it now, 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 OR PARTNER STILL OWNS IT..... GO TO T124  
BRANCHPOINT
2. SOLD..... GO TO T116
3. INHERITED
4. NOT YET DISPOSED..... GO TO T120
7. OTHER (SPECIFY) \_\_\_\_\_ [T112] GO TO T124 BRANCHPOINT
- DK..... GO TO T124 BRANCHPOINT
- RF..... GO TO T124 BRANCHPOINT

**!! EXIT 1st HOME INHERITED**

T113

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

[INSTR: SELECT ALL THAT APPLY.]

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

T114 BRANCHPOINT: IF PROXY DID NOT REPORT THAT CHILD/GRANDCHILD INHERITED THE HOUSE (T113 {NOT 2 and NOT 6}), GO TO T116

T055

IF CHILD (T113=2):  
(Which child is that?)

IF GRANDCHILD (T113={6 and {NOT 2}}):  
Which child is the parent of that grandchild?

[INSTR: SELECT ALL THAT APPLY.]

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

- 3. THROUGH 52. CHILD NAME(S)  
[ROWS PROVIDED BY BLAISE AS NECESSARY]
- 92. UNLISTED CHILD WHO IS DECEASED
- 93. ALL CHILDREN
- 97. OTHER (SPECIFY) \_\_\_\_\_ [T115]
- DK
- RF

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

**!! EXIT 1st HOME SOLD**

T116

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?

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_.00 GO TO T124 BRANCHPOINT

DK

RF

T117-  
T119

T117-T119 Unfolding Sequence

(Thinking about the [if T111=2: selling price/ otherwise: value] of that house:)

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

PROCEDURES: 1Up1Down, 2Down

BREAKPOINTS: \$15,000, **\$50,000, \$200,000**

RANDOM ENTRY POINTS: \$50,000, \$200,000

ENTRY POINT ASSIGNMENT 1 or {NOT 1} AT X503

ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

**T120 BRANCHPOINT: GO TO T124 BRANCHPOINT**

**!! EXIT HOME NOT DISPOSED**

T120

Is that home now vacant, or is someone living there?

1. VACANT..... GO TO T124 BRANCHPOINT

5. OCCUPIED

DK..... GO TO T124 BRANCHPOINT

RF..... GO TO 124 BRANCHPOINT

T121\_

Who lives in the house, (that is, what was their relationship to R's FIRST NAME)?

[INSTR: SELECT ALL THAT APPLY.]

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

T122 BRANCHPOINT: IF PROXY DID NOT REPORT THAT CHILD/GRANDCHILD LIVES IN HOUSE (T121 {NOT 2 and NOT 6}), GO TO T124 BRANCHPOINT

T056\_T  
122M

IF CHILD (T121=2):  
(Which child is that?)

IF GRANDCHILD (T121={6 and {NOT 2}}):  
Which child is the parent of that grandchild?

[INSTR: SELECT ALL THAT APPLY.]

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

3. THROUGH 52. CHILD NAME(S)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

92. UNLISTED CHILD WHO IS DECEASED

93. ALL CHILDREN

97. OTHER (SPECIFY) \_\_\_\_\_ [T123]

DK

RF

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

T124 BRANCHPOINT: IF THIS IS A POST-EXIT INTERVIEW (Z145={2 or 3 or 4}),  
GO TO T155 BRANCHPOINT

IF R DID NOT HAVE A SECOND RESIDENCE AT HH's LAST IW  
(X032 NOT 1), GO TO T148

T124

IF {R's LAST IW SPOUSE/PARTNER WAS NOT LIVING WHEN S/HE DIED (A023 NOT 1) and PROXY IS NOT A SURVIVING SPOUSE/PARTNER (A009 NOT 2)} or R {WAS REMARRIED WHEN S/HE DIED (A026=1) and WAS NOT COUPLED AT HH's LAST IW (Preload\_X065 {NOT 1 and NOT 3}):

Our records show that R's FIRST NAME owned a home in HH's LAST IW 2ND RESIDENCE CITY, STATE (STATE ABBREVIATION) [since [FINANCIAL R's LAST IW [MONTH, ]YEAR/in the last two years before [his/her] death].

IF R WAS MARRIED/PARTNERED AT HH's LAST IW (Preload\_X065={1 or 3}) and PROXY IS R's SURVIVING SPOUSE/PARTNER (A009=2):

IF PROXY IS THE SURVIVING SPOUSE/PARTNER (A009=2):

Our records show that you and R's FIRST NAME owned a home in HH's LAST IW 2ND RESIDENCE CITY (X029), STATE (STATE ABBREVIATION) (X030) [since [FINANCIAL R's LAST IW [MONTH, ]YEAR/in the last two years before [his/her] death].

OTHERWISE, IF R's LAST IW SPOUSE/PARTNER WAS LIVING WHEN S/HE DIED (A023=1) and PROXY IS NOT A SURVIVING SPOUSE/PARTNER (A009 NOT 2):

Our records show that R's FIRST NAME and [his/her] [husband/wife/partner] owned a home in HH's LAST IW 2ND RESIDENCE CITY, STATE (STATE ABBREVIATION) [since [FINANCIAL R's LAST IW [MONTH, ]YEAR/in the last two years before [his/her] death].

ASK ALL PROXIES:

Remind me, did [he/she] still own that home when [he/she] (died/passed away)?

1. YES..... GO TO T135

2. [VOL] RECORDS INCORRECT

5. NO

DK..... GO TO T148

RF..... GO TO T148

**!! EXIT 2ND HOME DISPOSED BEFORE DEATH**

T125

Did R's FIRST NAME ever own it?

- 1. YES
- 5. NO..... GO TO T148
- DK..... GO TO T148
- RF..... GO TO T148

T240

What happened to that home? Did R's FIRST NAME sell it, give it to someone, or what?

- 1. GAVE TO SOMEONE..... GO TO T128
- 2. SOLD..... GO TO T131
- 7. OTHER (SPECIFY) \_\_\_\_\_ [T241] GO TO T148
- DK..... GO TO T148
- RF..... GO TO T148

**!! EXIT 2ND HOME INHERITED BEFORE DEATH**

T128

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

[INSTR: SELECT ALL THAT APPLY.]

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

**T129 BRANCHPOINT: IF PROXY DID NOT REPORT THAT CHILD/GRANDCHILD LIVES IN HOUSE (T128 {NOT 2 and NOT 6}), GO TO T131**

T057\_T  
129M

IF CHILD (T128=2):  
(Which child is that?)

IF GRANDCHILD (T128={6 and {NOT 2}}):  
Which child is the parent of that grandchild?

[INSTR: SELECT ALL THAT APPLY.]

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

3. THROUGH 52. CHILD NAME(S)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

92. UNLISTED CHILD WHO IS DECEASED

93. ALL CHILDREN

97. OTHER (SPECIFY) \_\_\_\_\_ [T130]

DK

RF

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

**!! EXIT 2ND HOME SOLD BEFORE DEATH**

T131

IF R SOLD THE HOME (T240=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?

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_ .00 GO TO T148

DK

RF

T132-  
T134

## T132-T134 Unfolding Sequence

(Thinking about the [if T240=2: selling price/ otherwise: value] of that house:)

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

PROCEDURES: 1Up1Down, 2Down

BREAKPOINTS: \$15,000, **\$50,000**, **\$200,000**

RANDOM ENTRY POINTS: \$50,000, \$200,000

ENTRY POINT ASSIGNMENT 1 or {NOT 1} AT X504

ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

**T135 BRANCHPOINT: GO TO T148**

**!! EXIT 2ND HOME DISPOSAL AFTER DEATH**

T135

What happened to that home after R's FIRST NAME's death:

IF PROXY IS THE SURVIVING SPOUSE/PARTNER (A009=2):

Do you own it now, was it sold, was it inherited by someone else, has it not yet been disposed of, or what?

IF {PROXY IS NOT R's SPOUSE/PARTNER AND R's SPOUSE/PARTNER WAS STILL LIVING WHEN S/HE DIED} (A023=1):

Does [his/her] [husband/wife/partner] own it now, 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..... GO TO T148

2. SOLD..... GO TO T140

3. INHERITED

4. NOT YET DISPOSED..... GO TO T144

7. OTHER (SPECIFY) \_\_\_\_\_ [T136]

DK..... GO TO T148

RF..... GO TO T148

**!! EXIT 2ND HOME INHERITED**

T137



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

[INSTR: SELECT ALL THAT APPLY.]

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

T138 BRANCHPOINT: IF PROXY DID NOT REPORT THAT CHILD/GRANDCHILD INHERITED HOUSE (T137 {NOT 2 and NOT 6}), GO TO T140

T058\_T  
138M

IF CHILD (T137=2):  
(Which child is that?)

IF GRANDCHILD (T137={6 and {NOT 2}}):  
Which child is the parent of that grandchild?

[INSTR: SELECT ALL THAT APPLY.]

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

- 3. THROUGH 52. CHILD NAME(S)  
[ROWS PROVIDED BY BLAISE AS NECESSARY]
- 92. UNLISTED CHILD WHO IS DECEASED
- 93. ALL CHILDREN
- 97. OTHER (SPECIFY) \_\_\_\_\_ [T139]
- DK
- RF

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

**!! EXIT 2ND HOME SOLD**

T140

IF R SOLD THE HOME (T135=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?

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_.00 GO TO T148

DK

RF

T141-

T143

T141-T143 Unfolding Sequence

(Thinking about the [if T135=2:selling price/otherwise:value] of that house:)

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

PROCEDURE: 1Up1Down

BREAKPOINTS: \$15,000, **\$50,000**, \$200,000

ENTRY POINT: \$50,000

**T144 BRANCHPOINT: GO TO T148**

**!! EXIT 2ND HOME NOT DISPOSED YET**

T144

Is that home now vacant, or is someone living there?

1. VACANT..... GO TO T148

5. OCCUPIED

DK..... GO TO T148

RF..... GO TO T148

T145

Who lives in the house, (that is, what was their relationship to R's FIRST NAME)?

[INSTR: SELECT ALL THAT APPLY.]

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

T146 BRANCHPOINT: IF PROXY DID NOT REPORT THAT CHILD/GRANDCHILD LIVES IN HOUSE (T145 {NOT 2 and NOT 6}), GO TO T148

T059\_T  
146M

IF CHILD (T145=2):  
(Which child is that?)

IF GRANDCHILD (T145={6 and {NOT 2}}):  
Which child is the parent of that grandchild?

[INSTR: SELECT ALL THAT APPLY.]

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

3. THROUGH 52. CHILD NAME(S)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

92. UNLISTED CHILD WHO IS DECEASED

93. ALL CHILDREN

97. OTHER (SPECIFY)\_\_\_\_\_ [T147]

DK

RF

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

**!! EXIT DEATH EXPENSES**

T148

I asked you earlier about expenses incurred for the health care that R's FIRST NAME received. Now I want to know about expenses associated with [his/her] death, for funeral expenses, legal fees, and so on.

What were the total expenses associated with the death for things of that type?

[INSTR: DO NOT PROBE DK/RF.]

[INSTR: ENTER 99996 IF NOT SETTLED YET.]

\$ \_\_\_\_\_.00 GO TO T152

☐

99996 NOT SETTLED YET..... GO TO T152

0..... GO TO T155 BRANCHPOINT

DK

RF

T149-  
T151

T149-T151 Unfolding Sequence

(Thinking about the total expenses associated with the death for things like the funeral, legal fees and so on

Do not include health care expenses:)

Question text: Did it amount to less than \$\_\_\_\_, more than \$\_\_\_\_, or what?

PROCEDURES: 2Up1Down, 1Up2Down

BREAKPOINTS: \$1,000, **\$5,000**, **\$25,000**, \$100,000

RANDOM ENTRY POINTS: \$5,000, \$25,000

ENTRY POINT ASSIGNMENT 1 or {NOT 1} AT X505

ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

T152

Excluding life insurance, were any of these costs covered by insurance?

- 1. YES
- 5. NO..... GO TO T155 BRANCHPOINT
- DK..... GO TO T155 BRANCHPOINT
- RF..... GO TO T155 BRANCHPOINT

T153

How much did insurance pay?

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR PERCENTAGE.]

\$ \_\_\_\_\_ .00 OR \_\_\_\_\_ %

[T153]                      [T154]

DK  
RF

T155 BRANCHPOINT: IF THIS IS A POST-EXIT IW and WE DON'T NEED TO ASK ABOUT THE WILL/TRUST (Z146 {NOT 2 and NOT 3}), GO TO T173

T155

Sometimes people make provisions to leave things to specific family members if something happens to them, others do not. Because we are trying to get a complete picture of family situations, I have a few questions about inheritance.

Before [his/her] death, had R's FIRST NAME put any of [his/her] assets into a trust?

- 1. YES
- 5. NO
- DK
- RF

T156

IF R PUT ASSETS INTO TRUST (T155=1):

In addition to the trust, did R's FIRST NAME have a will that was written and witnessed?

OTHERWISE:

Did R's FIRST NAME have a will that was written and witnessed?

1. YES

5. NO..... GO TO T161 BRANCHPOINT

DK..... GO TO T161 BRANCHPOINT

RF..... GO TO T161 BRANCHPOINT

T157

Has [his/her] will been probated?

1. YES

2. [VOL] NO: PROBATE NOT NEEDED, GO TO T161 BRANCHPOINT

3. [VOL] NO: NO ASSETS REMAINED TO BE PROBATED..... GO TO T161  
BRANCHPOINT

4. [VOL] NO: ALL ASSETS WERE HELD IN JOINT TENANCY  
OR IN A TRUST..... GO TO T161 BRANCHPOINT

5. NO..... GO TO T161 BRANCHPOINT

7. [VOL] R DISPUTES RECORD..... GO TO T161 BRANCHPOINT

DK..... GO TO T161 BRANCHPOINT

RF..... GO TO T161 BRANCHPOINT

T158

In what state was it probated?

\_\_\_\_\_  
STATE

97. OTHER COUNTRY (SPECIFY) \_\_\_\_\_ [T159] GO TO T161  
BRANCHPOINT

DK..... GO TO T161 BRANCHPOINT

RF..... GO TO T161 BRANCHPOINT

NOTE: THE IWER SELECTS FROM A MENU OF STATE NAMES, INCLUDING  
WASHINGTON, D.C., AND PUERTO RICO.

T160

In what county was it probated?

\_\_\_\_\_  
COUNTY

DK

RF

T161 BRANCHPOINT: IF R HAD {A TRUST or A PROBATED WILL} ({T155 or T157}=1),  
GO TO T163 LOOP BRANCHPOINT

**!! EXIT DISTRIBUTION OF ASSETS**

T161

The next 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) \_\_\_\_\_ [T162]
- DK  
RF

T163 LOOP BRANCHPOINT: IF {R HAD NEITHER A TRUST NOR A PROBATED WILL ({T155 and 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 T177 BRANCHPOINT

IF R WAS NOT PART OF A COUPLE (X065 {NOT 1 and NOT 3}), GO TO T164 BRANCHPOINT

**T163 THROUGH T908-8 ARE ASKED FOR POTENTIAL BENEFICIARIES OF R's ESTATE**

T163

IF R HAD {A TRUST and/or A WILL} ({T155 and T156}=1 or T155=1 or 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..... GO TO T164 BRANCHPOINT
- DK..... GO TO T164 BRANCHPOINT  
RF..... GO TO T164 BRANCHPOINT

\*\*\*BEGINNING OF BLOCK\_1: AMOUNT TO SPOUSE/PARTNER  
(T902\_1 - T908\_1)

T902

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

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_ .00 GO TO T164 BRANCHPOINT  
T902\_1

OR

\_\_\_\_\_ % GO TO T164 BRANCHPOINT  
T903\_1

DK

RF

T904

Was it more than half of [his/her] estate?

1. YES

5. NO..... GO TO T907\_1

DK..... GO TO T164 BRANCHPOINT

RF..... GO TO T164 BRANCHPOINT

T905

Was it more than 75 percent of [his/her] estate?

1. YES

5. NO..... GO TO T164 BRANCHPOINT

DK..... GO TO T164 BRANCHPOINT

RF..... GO TO T164 BRANCHPOINT

T906

Was it more than 90 percent of [his/her] [his/her] estate?

1. YES..... GO TO T164 BRANCHPOINT

5. NO..... GO TO T164 BRANCHPOINT

DK..... GO TO T164 BRANCHPOINT

RF..... GO TO T164 BRANCHPOINT

T907



Was it more than 25 percent of [his/her] estate?

1. YES..... GO TO T164 BRANCHPOINT

5. NO

DK..... GO TO T164 BRANCHPOINT

RF..... GO TO T164 BRANCHPOINT

T908

Was it more than 10 percent of [his/her] estate?

1. YES

5. NO

DK

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 {{THIS IS A NEW EXIT IW (A007=5 and {Z145 {NOT 2 and NOT 3 and NOT 4}}) and {PROXY DID NOT REPORT THAT R HAD GRANDCHILDREN (E046 NOT {>0 - <81}}) or {THIS IS A POST-EXIT IW (Z145={2 or 3 or 4}) and R WAS NOT REPORTED IN A PREVIOUS WAVE TO HAVE GRANDCHILDREN (Z114 NOT {>0 - <81}})}, GO TO T168

T164

IF R HAD {A TRUST and/or A WILL} ({T155 and T156}=1 or T155=1 or 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 or assets left to any of [his/her] [children or grandchildren (or great-grandchildren)/children/grandchildren (or great-grandchildren)]?

1. YES

5. NO..... GO TO T168

DK..... GO TO T168

RF..... GO TO T168

T165 BRANCHPOINT: IF R DOES NOT HAVE ANY CHILDREN (A101=0), GO TO T166 BRANCHPOINT

IF R HAS ONLY ONE CHILD (A101=1), GO TO T902\_2

T165

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

[INSTR: WE ARE INTERESTED IN THE TOTAL AMOUNT GIVEN TO EACH OF R'S CHILDREN AND THEIR SPOUSES AND CHILDREN.]

1. YES..... GO TO T902\_2  
5. NO..... GO TO BEGINNING OF T902\_3 LOOP  
DK..... GO TO BEGINNING OF T902\_3 LOOP  
RF..... GO TO BEGINNING OF T902\_3 LOOP

T166 BRANCHPOINT: IF R HAS/HAD ONLY ONE GRANDCHILD (E046=1 or Z114=1), ASSIGN 1 TO T166 AND GO TO T902\_2

T166

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

1. YES  
5. NO  
DK  
RF

\*\*\*BEGINNING OF BLOCK\_2: SAME AMOUNT TO ALL CHILDREN  
(T902\_2 - T908\_2)

T902

IF R LEFT EQUAL AMOUNTS TO EACH (CHILD AND FAMILY) (T165=1):  
Altogether, how much did [he/she] leave for [his/her] children and their families?

IF R HAS ONLY 1 CHILD (A101=1):  
Altogether, how much did [he/she] leave for [his/her] child and (his/her) family?

IF {PROXY WAS ASKED WHETHER R LEFT EQUAL AMOUNTS TO GRANDCHILDREN  
or VALUE WAS ASSIGNED} (T166 NOT EMPTY):  
Altogether, how much did [he/she] leave for [his/her]  
(grandchild/grandchildren)?

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_ .00 GO TO T168  
T902\_2

OR  
\_\_\_\_\_ % GO TO T168  
T903\_2

DK  
RF

T904

Was it more than half of [his/her] estate?

1. YES  
5. NO..... GO TO T907\_2  
DK..... GO TO T168  
RF..... GO TO T168

T905

Was it more than 75 percent of [his/her] estate?

1. YES  
5. NO..... GO TO T168  
DK..... GO TO T168  
RF..... GO TO T168

T906

Was it more than 90 percent of [his/her] [his/her] estate?

1. YES..... GO TO GO TO T168  
5. NO..... GO TO GO TO T168  
DK..... GO TO GO TO T168  
RF..... GO TO GO TO T168

T907

Was it more than 25 percent of [his/her] estate?

1. YES..... GO TO GO TO T168

5. NO

DK..... GO TO GO TO T168

RF..... GO TO GO TO T168

T908

Was it more than 10 percent of [his/her] estate?

1. YES..... GO TO GO TO T168

5. NO..... GO TO GO TO T168

DK..... GO TO GO TO T168

RF..... GO TO GO TO T168

\*\*\*END OF BLOCK\_2: SAME AMOUNT TO ALL CHILDREN (T902\_2 - T908\_2)

T902\_3 LOOP BRANCHPOINT: GO TO T168

\*\*\*BEGINNING OF T902\_3 LOOP: ESTATE DISPERSAL TO EACH CHILD

T902\_2 - T908\_2 ARE ASKED FOR EACH CHILD

\*\*\*BEGINNING OF BLOCK\_3: AMOUNT TO EACH CHILD

T902

NOTE: THIS BLOCK IS REPEATED FOR EACH CHILD LISTED FOR A HOUSEHOLD.

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

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_ .00 GO TO END OF T902\_3 LOOP (AFTER T908\_3)  
T902\_3

OR

\_\_\_\_\_ % GO TO END OF T902\_3 LOOP (AFTER T908\_3)  
T903\_3

DK

RF

T904

Was it more than half of [his/her] estate?

1. YES

5. NO..... GO TO T907\_3

DK..... GO TO END OF T902\_3 LOOP (AFTER T908\_3)

RF..... GO TO END OF T902\_3 LOOP (AFTER T908\_3)

T905

Was it more than 75 percent of [his/her] estate?

1. YES

5. NO..... GO TO END OF T902\_3 LOOP (AFTER T908\_3)

DK..... GO TO END OF T902\_3 LOOP (AFTER T908\_3)

RF..... GO TO END OF T902\_3 LOOP (AFTER T908\_3)

T906

Was it more than 90 percent of [his/her] estate?

1. YES..... GO TO END OF T902\_3 LOOP (AFTER T902\_3)

5. NO..... GO TO END OF T902\_3 LOOP (AFTER T902\_3)

DK..... GO TO END OF T902\_3 LOOP (AFTER T902\_3)

RF..... GO TO END OF T902\_3 LOOP (AFTER T902\_3)

T907

Was it more than 25 percent of [his/her] estate?

1. YES..... GO TO END OF T902\_3 LOOP (AFTER T908\_3)

5. NO

DK..... GO TO END OF T902\_3 LOOP (AFTER T908\_3)

RF..... GO TO END OF T902\_3 LOOP (AFTER T908\_3)

T908

Was it more than 10 percent of [his/her] estate?

1. YES

5. NO

DK

RF

\*\*\*END OF BLOCK\_3: AMOUNT TO EACH CHILD (T902\_3 - T908\_3)

T168

IF R HAD {A TRUST and/or A WILL} ({T155 and T156}=1 or T155=1 or 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 or assets left to  
charities?

1. YES

5. NO..... GO TO T169

DK..... GO TO T169

RF..... GO TO T169

\*\*\*BEGINNING OF BLOCK\_4: AMOUNT TO CHARITIES  
(T902\_4 - T908\_4)

T902

How much did charities receive from [his/her] estate?

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_ .00 GO TO T169  
T902\_4

OR

\_\_\_\_\_ GO TO T169  
T903\_4

DK

RF

T904

Was it more than half of [his/her] estate?

1. YES

5. NO..... GO TO T907\_4

DK..... GO TO T169

RF..... GO TO T169

T905

Was it more than 75 percent of [his/her] estate?

1. YES

5. NO..... GO TO T169

DK..... GO TO T169

RF..... GO TO T169

T906

Was it more than 90 percent of [his/her] estate?

1. YES..... GO TO T169

5. NO..... GO TO T169

DK..... GO TO T169

RF..... GO TO T169

T907

Was it more than 25 percent of [his/her] estate?

1. YES..... GO TO T169

5. NO

DK..... GO TO T169

RF..... GO TO T169

T908

Was it more than 10 percent of [his/her] estate?

1. YES

5. NO

DK

RF

\*\*\*END OF BLOCK\_4: AMOUNT TO CHARITIES (T902\_4 - T908\_4)

T169

IF R HAD {A TRUST and/or A WILL} ({T155 and T156}=1 or T155=1 or 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 or assets left to  
any of [his/her] brothers or sisters?

1. YES

5. NO..... GO TO T170

DK..... GO TO T170

RF..... GO TO T170

\*\*\*BEGINNING OF BLOCK\_5: AMOUNT TO SIBLINGS  
(T902\_5 - T908\_5)

T902



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

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_ .00 GO TO T170  
T902\_5

OR

\_\_\_\_\_ % GO TO T170  
T903\_5

DK  
RF

T904

Was it more than half of [his/her] estate?

1. YES  
5. NO..... GO TO T907\_5  
DK..... GO TO T170  
RF..... GO TO T170

T905

Was it more than 75 percent of [his/her] estate?

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

T906

Was it more than 90 percent of [his/her] estate?

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

T907

Was it more than 25 percent of [his/her] estate?

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

T908

Was it more than 10 percent of [his/her] estate?

1. YES

5. NO

DK

RF

\*\*\*END OF BLOCK\_5: AMOUNT TO SIBLINGS (T902\_5 - T908\_5)

T170

IF R HAD {A TRUST and/or A WILL} ({T155 and T156}=1 or T155=1 or 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 or assets left to  
any other of [his/her] relatives?

1. YES

5. NO..... GO TO T171

DK..... GO TO T171

RF..... GO TO T171

\*\*\*BEGINNING OF BLOCK\_6: AMOUNT TO OTHER RELATIVES  
(T902\_6 - T908\_6)

T902

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

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_ .00 GO TO T171  
T902\_6

OR

\_\_\_\_\_ % GO TO T171  
T903\_6

DK

RF

T904

Was it more than half of [his/her] estate?

1. YES  
5. NO..... GO TO T907\_6  
DK..... GO TO T171  
RF..... GO TO T171

T905

Was it more than 75 percent of [his/her] estate?

1. YES  
5. NO..... GO TO T171  
DK..... GO TO T171  
RF..... GO TO T171

T906

Was it more than 90 percent of [his/her] estate?

1. YES..... GO TO T171  
5. NO..... GO TO T171  
DK..... GO TO T171  
RF..... GO TO T171

T907

Was it more than 25 percent of [his/her] estate?

1. YES..... GO TO T171  
5. NO  
DK..... GO TO T171  
RF..... GO TO T171

T908

Was it more than 10 percent of [his/her] estate?

1. YES

5. NO

DK

RF

\*\*\*END OF BLOCK\_6: AMOUNT TO OTHER RELATIVES (T902\_6 - T908\_6)

T171

IF R HAD {A TRUST and/or A WILL} ({T155 and T156}=1 or T155=1 or 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 or assets left to  
any of [his/her] friends?

1. YES

5. NO..... GO TO T172

DK..... GO TO T172

RF..... GO TO T172

\*\*\*BEGINNING OF BLOCK\_7: AMOUNT TO FRIENDS  
(T902\_7 - T908\_7)

T902

Altogether, how much did [his/her] friends receive from [his/her] estate?

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_ .00 GO TO T172

T902\_7

OR

\_\_\_\_\_ % GO TO T172

T903\_7

DK

RF

T904

Was it more than half of [his/her] estate?

- 1. YES
- 5. NO..... GO TO T907\_7
- DK..... GO TO T172
- RF..... GO TO T172

T905

Was it more than 75 percent of [his/her] estate?

- 1. YES
- 5. NO..... GO TO T172
- DK..... GO TO T172
- RF..... GO TO T172

T906

Was it more than 90 percent of [his/her] estate?

- 1. YES..... GO TO T172
- 5. NO..... GO TO T172
- DK..... GO TO T172
- RF..... GO TO T172

T907

Was it more than 25 percent of [his/her] estate?

- 1. YES..... GO TO T172
- 5. NO
- DK..... GO TO T172
- RF..... GO TO T172

T908

Was it more than 10 percent of [his/her] estate?

- 1. YES
- 5. NO
- DK
- RF

**\*\*\*END OF BLOCK\_7: AMOUNT TO FRIENDS (T902\_7 - T908\_7)**

T172

IF R HAD {A TRUST and/or A WILL} ({T155 and T156}=1 or T155=1 or 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 or assets left to  
anyone else or anything else that we have not yet listed?

- 1. YES
- 5. NO..... GO TO T173
- DK..... GO TO T173
- RF..... GO TO T173

\*\*\*BEGINNING OF BLOCK\_8: AMOUNT TO OTHERS  
(T902\_8 - T908\_8)

T902

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

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_ .00 GO TO T173  
T902\_8

OR

\_\_\_\_\_ % GO TO T173  
T903\_8

DK  
RF

T904

Was it more than half of [his/her] estate?

- 1. YES
- 5. NO..... GO TO T907\_8
- DK..... GO TO T173
- RF..... GO TO T173

T905

Was it more than 75 percent of [his/her] estate?

- 1. YES
- 5. NO..... GO TO T173
- DK..... GO TO T173
- RF..... GO TO T173

T906

Was it more than 90 percent of [his/her] estate?

- 1. YES..... GO TO T173
- 5. NO..... GO TO T173
- DK..... GO TO T173
- RF..... GO TO T173

T907

Was it more than 25 percent of [his/her] estate?

- 1. YES..... GO TO T173
- 5. NO
- DK..... GO TO T173
- RF..... GO TO T173

T908

Was it more than 10 percent of [his/her] estate?

- 1. YES
- 5. NO
- DK
- RF

\*\*\*END OF BLOCK\_8: AMOUNT TO OTHERS (T902\_8 - T908\_8)

\*\*\*END OF T163 ESTATE DISPERSAL LOOP. CONTINUE ON TO T173.

!! EXIT VALUE OF ESTATE

T173

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

[INSTR: DO NOT PROBE DK/RF.]

\$\_\_\_\_\_.00 GO TO T242 BRANCHPOINT

- DK
- RF

T174-  
T176

## T174-T176 Unfolding Sequence

(Thinking about the total value of the estate, minus any life insurance:)

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

PROCEDURES: 3Up1Down, 2Up2Down, 1Up3Down

BREAKPOINTS: \$10,000, **\$25,000**, **\$100,000**, **\$500,000**, \$2,000,000

RANDOM ENTRY POINTS: \$25,000, \$100,000, \$500,000

ENTRY POINT ASSIGNMENT [1 (\$100,000)] or [2 (\$25,000)] or

[{NOT 1 and NOT 2} (\$500,000)] AT X511

T242 BRANCHPOINT: IF THIS IS A POST-EXIT INTERVIEW (Z145={2 or 3 or 4}) and PROXY DID NOT SAY R STILL OWNED HOME AT TIME OF DEATH (T101 NOT 1), GO TO END OF INTERVIEW

IF THIS IS NOT A POST-EXIT IW (Z145 {NOT 2 and NOT 3 and NOT 4})) and R DID NOT OWN RESIDENCE/MOBILE HOME/FARM IN HH's LAST IW (X079 NOT 1), GO TO T177

IF R OWNED RESIDENCE/MOBILE HOME/FARM IN HH's LAST IW (X079 =1), AND PROXY SAYS R NEVER OWNED HOME (T066 = 5), GO TO T177 BRANCHPOINT

T242

Does that include the value of the home?

1. YES

5. NO

DK

RF

T177 BRANCHPOINT: IF THIS IS A POST-EXIT INTERVIEW (Z145={2 or 3 or 4}), GO TO END OF INTERVIEW

**!! EXIT ESTATE IN TRUST**

T177



IF R PUT ASSETS INTO TRUST (T155=1):

Is any part of [his/her] estate still held in any type of a trust?

OTHERWISE:

Was any part of [his/her] estate put into a trust after [he/she] (died/passed away)?

1. YES

5. NO..... GO TO T181 ~~BRANCHPOINT~~

DK..... GO TO T181 ~~BRANCHPOINT~~

RF..... GO TO T181 ~~BRANCHPOINT~~

T178\_

Who is currently the trustee of this trust?

[INSTR: SELECT ALL THAT APPLY.]

DEFINITION: A trustee is a person who administers manages the trust.

1. SPOUSE/PARTNER

2. CHILD/ CHILD-IN-LAW

3. OTHER RELATIVE

4. ATTORNEY

5. BANK OFFICER/TRUST DEPARTMENT AT A BANK

6. GRANDCHILD

7. OTHER (SPECIFY)\_\_\_\_\_ [T179]

DK

RF

T180 BRANCHPOINT: IF PROXY DID NOT REPORT THAT TRUSTEE IS A CHILD/GRANDCHILD (T178 {NOT 2 and NOT 6}), GO TO T181 ~~BRANCHPOINT~~

T065\_T  
180MT  
emp

#@ MM (7/27/2022)

Removed

"Branchpoint" as the  
T181 Branchpoint no  
longer exists.

#@ MM (7/27/2022)

Removed

"Branchpoint" as the  
T181 Branchpoint no  
longer exists.

IF CHILD (T178=2):  
(Which child is that?)

IF GRANDCHILD (T178={6 and {NOT 2}}):  
Which child is the parent of that grandchild?

[INSTR: SELECT ALL THAT APPLY.]

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

3. THROUGH 52. CHILD NAME(S)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

92. UNLISTED CHILD WHO IS DECEASED

97. OTHER (SPECIFY)\_\_\_\_\_ [T238]

DK

RF

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

**!! EXIT LIFE INSURANCE SETTLEMENT**

T181\_H  
aveLifel  
ns

IF R HAD {A TRUST or A WILL} (T155=1 or T156=1) or THE WILL HAS BEEN  
PROBATED (T157=1) or {ASSETS AND POSSESSIONS} WERE DIVIDED AMONG  
THE HEIRS (T161=1):

In addition to what you have just told me about [his/her] estate did anyone  
receive a settlement from life insurance?

OTHERWISE:

Did anyone receive a settlement from life insurance?

1. YES

5. NO..... GO TO T190

DK..... GO TO T190

RF..... GO TO T190

T182

Who were the beneficiaries of that life insurance?

[INSTR: SELECT ALL THAT APPLY.]

1. SPOUSE/PARTNER
2. CHILDR(EN)
3. GRANDCHILD(REN) OR GREAT-GRANDCHILD(REN)
4. OTHER RELATIVE(S)
7. OTHER (SPECIFY) \_\_\_\_\_ [T183]
- DK
- RF

T184 BRANCHPOINT: IF PROXY {DID NOT REPORT THAT BENEFICIARY IS CHILD(REN) and DID NOT REPORT THAT IS GRANDCHILD(REN)} (T182 {NOT 2 and NOT 3}), GO TO T902\_11 BRANCHPOINT

IF R HAS ONLY ONE CHILD (A101=1), GO TO BEGINNING OF T902\_10 LOOP

T184

Did each of [his/her] children and their families receive the same amount from life insurance?

1. YES
5. NO..... GO TO THE BEGINNING OF T902\_10 LOOP
- DK..... GO TO THE BEGINNING OF T902\_10 LOOP
- RF..... GO TO THE BEGINNING OF T902\_10 LOOP

T902\_9 THROUGH T908\_13 ARE ASKED ABOUT ALL CHILD BENEFICIARIES OF R's LIFE INSURANCE COMBINED.

\*\*\*BEGINNING OF BLOCK\_9: LIFE INSURANCE: SAME AMOUNT TO ALL CHILDREN  
(T902\_9 - T908\_9)

T902

Altogether, how much did [his/her] children receive from [his/her] life insurance?

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_ .00 GO TO T902\_11 BRANCHPOINT  
T902\_9

OR

\_\_\_\_\_ % GO TO T902\_11 BRANCHPOINT  
T903\_9

DK  
RF

T904

Was it more than half of [his/her] life insurance settlement?

1. YES  
5. NO..... GO TO T907\_9  
DK..... GO TO T902\_11 BRANCHPOINT  
RF..... GO TO T902\_11 BRANCHPOINT

T905

Was it more than 75 percent of [his/her] life insurance settlement?

1. YES  
5. NO..... GO TO T902\_11 BRANCHPOINT  
DK..... GO TO T902\_11 BRANCHPOINT  
RF..... GO TO T902\_11 BRANCHPOINT

T906

Was it more than 90 percent of [his/her] life insurance settlement?

1. YES..... GO TO T902\_11 BRANCHPOINT  
5. NO..... GO TO T902\_11 BRANCHPOINT  
DK..... GO TO T902\_11 BRANCHPOINT  
RF..... GO TO T902\_11 BRANCHPOINT

T907\_9

Was it more than 25 percent of [his/her] life insurance settlement?

1. YES..... GO TO T902\_11 BRANCHPOINT  
5. NO  
DK..... GO TO T902\_11 BRANCHPOINT  
RF..... GO TO T902\_11 BRANCHPOINT

T908

Was it more than 10 percent of [his/her] life insurance settlement?

1. YES..... GO TO T902\_11 BRANCHPOINT

5. NO..... GO TO T902\_11 BRANCHPOINT

DK..... GO TO T902\_11 BRANCHPOINT

RF..... GO TO T902\_11 BRANCHPOINT

\*\*\*END OF BLOCK\_9: LIFE INSURANCE: SAME AMOUNT TO ALL CHILDREN  
(T902\_9 - T908\_9)

\*\*\* BEGINNING OF T902\_10 LOOP: LIFE INSURANCE TO EACH CHILD  
T902\_10 THROUGH T908\_10 ARE ASKED FOR EACH CHILD.

\*\*\*BEGINNING OF BLOCK\_10: LIFE INSURANCE: AMOUNT TO EACH CHILD  
(T902\_10 - T908\_10)

NOTE: THIS BLOCK IS REPEATED FOR EACH CHILD LISTED FOR A HOUSEHOLD.

T902

How much did CHILdN NAME and (his/her) family receive from life insurance?

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_.00 GO TO END OF T902\_10 LOOP (AFTER T908\_10)  
T902\_10

OR

\_\_\_\_\_ % GO TO END OF T902\_10 LOOP (AFTER T908\_10)  
T903\_10

DK  
RF

T904

Was it more than half of [his/her] life insurance settlement?

1. YES

5. NO..... GO TO T907\_10

DK..... GO TO END OF T902\_10 LOOP (AFTER T908\_10)

RF..... GO TO END OF T902\_10 LOOP (AFTER T908\_10)

T905\_1

0

Was it more than 75 percent of [his/her] life insurance settlement?

1. YES

5. NO..... GO TO END OF T902\_10 LOOP (AFTER T908\_10)

DK..... GO TO END OF T902\_10 LOOP (AFTER T908\_10)

RF..... GO TO END OF T902\_10 LOOP (AFTER T908\_10)

T906

Was it more than 90 percent of [his/her] life insurance settlement?

1. YES..... GO TO END OF T902\_10 LOOP AFTER (T908\_10)

5. NO..... GO TO END OF T902\_10 LOOP (AFTER T908\_10)

DK..... GO TO END OF T902\_10 LOOP (AFTER T908\_10)

RF..... GO TO END OF T902\_10 LOOP (AFTER T908\_10)

T907\_1

0

Was it more than 25 percent of [his/her] life insurance settlement?

1. YES..... GO TO END OF T902\_10 LOOP AFTER (T908\_10)

5. NO

DK..... GO TO END OF T902\_10 LOOP (AFTER T908\_10)

RF..... GO TO END OF T902\_10 LOOP (AFTER T908\_10)

T908

Was it more than 10 percent of [his/her] life insurance settlement?

1. YES

5. NO

DK

RF

\*\*\*END OF BLOCK\_10: LIFE INSURANCE: AMOUNT TO EACH CHILD  
(T902\_10 - T908\_10)

\*\*\*END OF T902\_10 LOOP: LIFE INSURANCE TO EACH CHILD  
IF THERE ARE NO MORE CHILDREN, CONTINUE ON TO T902\_11 BRANCHPOINT.  
OTHERWISE, GO BACK TO BEGINNING OF T902\_10 LOOP

T902\_11 BRANCHPOINT: IF LIFE INSURANCE BENEFICIARY WAS R's SPOUSE/PARTNER (T182=1), CONTINUE ON TO T902\_11

OTHERWISE, GO TO T902\_12 BRANCHPOINT

\*\*\*BEGINNING OF BLOCK\_11: LIFE INSURANCE: AMOUNT TO SPOUSE/PARTNER (T902\_11 - T908\_11)

T902\_1  
1

Altogether, how much did [you/[[his/her] [husband/wife/partner]]] receive from [his/her] life insurance?

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_.00 GO TO T902\_12 BRANCHPOINT  
T902\_11

OR

\_\_\_\_\_ % GO TO T902\_12 BRANCHPOINT  
T903\_11

DK

RF

T904\_1  
1

Was it more than half of [his/her] life insurance settlement?

1. YES

5. NO..... GO TO T907\_11

DK..... GO TO T902\_12 BRANCHPOINT

RF..... GO TO T902\_12 BRANCHPOINT

T905\_1  
1

Was it more than 75 percent of [his/her] life insurance settlement?

1. YES

5. NO..... GO TO T902\_12 BRANCHPOINT

DK..... GO TO T902\_12 BRANCHPOINT

RF..... GO TO T902\_12 BRANCHPOINT

T906\_1

1

Was it more than 90 percent of [his/her] life insurance settlement?

1. YES..... GO TO T902\_12 BRANCHPOINT

5. NO..... GO TO T902\_12 BRANCHPOINT

DK..... GO TO T902\_12 BRANCHPOINT

RF..... GO TO T902\_12 BRANCHPOINT

T907\_

More25

Was it more than 25 percent of [his/her] life insurance settlement?

1. YES..... GO TO T902\_12 BRANCHPOINT

5. NO

DK..... GO TO T902\_12 BRANCHPOINT

RF..... GO TO T902\_12 BRANCHPOINT

T908\_1

1

Was it more than 10 percent of [his/her] life insurance settlement?

1. YES

5. NO

DK

RF

*\*\*\*END OF BLOCK\_11: LIFE INSURANCE: AMOUNT TO SPOUSE/PARTNER  
(T902\_11 - T908\_11)*

T902\_12 BRANCHPOINT: IF R's LIFE INSURANCE BENEFICIARY WAS OTHER  
RELATIVE(S) (T182=4)}, CONTINUE ON TO T902\_12

OTHERWISE, GO TO T902\_13 BRANCHPOINT

*\*\*\*BEGINNING OF BLOCK\_12: LIFE INSURANCE: AMOUNT TO OTHER RELATIVES  
(T902\_12 - T908\_12)*

T902



Altogether, how much did [his/her] other relatives receive from [his/her] life insurance?

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_ .00 GO TO T902\_13 BRANCHPOINT  
T902\_12

OR

\_\_\_\_\_ % GO TO T902\_13 BRANCHPOINT  
T903\_12

T904

Was it more than half of [his/her] life insurance settlement?

- 1. YES
- 5. NO..... GO TO T907\_12
- DK..... GO TO T902\_13 BRANCHPOINT
- RF..... GO TO T902\_13 BRANCHPOINT

T905\_1  
2

Was it more than 75 percent of [his/her] life insurance settlement?

- 1. YES
- 5. NO..... GO TO T902\_13 BRANCHPOINT
- DK..... GO TO T902\_13 BRANCHPOINT
- RF..... GO TO T902\_13 BRANCHPOINT

T906\_1  
2

Was it more than 90 percent of [his/her] life insurance settlement?

- 1. YES..... GO TO T902\_13 BRANCHPOINT
- 5. NO..... GO TO T902\_13 BRANCHPOINT
- DK..... GO TO T902\_13 BRANCHPOINT
- RF..... GO TO T902\_13 BRANCHPOINT

T907\_1  
2

Was it more than 25 percent of [his/her] life insurance settlement?

- 1. YES..... GO TO T902\_13 BRANCHPOINT
- 5. NO
- DK..... GO TO T902\_13 BRANCHPOINT
- RF..... GO TO T902\_13 BRANCHPOINT

T908

Was it more than 10 percent of [his/her] life insurance settlement?

1. YES

5. NO

DK

RF

\*\*\*END OF BLOCK\_12: LIFE INSURANCE: AMOUNT TO OTHER RELATIVES  
(T902\_12 - T908\_12)

T902\_13 BRANCHPOINT: IF RESPONSE TO LIFE INSURANCE BENEFICIARY WAS  
OTHER (SPECIFY) (T182=7)}, CONTINUE ON TO T902\_13

OTHERWISE, GO TO T186 BRANCHPOINT

T902\_1  
3

Altogether, how much did other non-relatives receive from [his/her] life  
insurance?

[INSTR: ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE.]

[INSTR: DO NOT PROBE DK/RF.]

\$ \_\_\_\_\_ .00 GO TO T186 BRANCHPOINT

T902\_13

OR

\_\_\_\_\_ % GO TO T186 BRANCHPOINT

T903\_13

DK

RF

T904\_1  
3

Was it more than half of [his/her] life insurance settlement?

1. YES

5. NO..... GO TO T907\_13

DK..... GO TO T186 BRANCHPOINT

RF..... GO TO T186 BRANCHPOINT

T905

Was it more than 75 percent of [his/her] life insurance settlement?

- 1. YES
- 5. NO..... GO TO T186 BRANCHPOINT
- DK..... GO TO T186 BRANCHPOINT
- RF..... GO TO T186 BRANCHPOINT

T906\_1  
3

Was it more than 90 percent of [his/her] life insurance settlement?

- 1. YES..... GO TO T186 BRANCHPOINT
- 5. NO..... GO TO T186 BRANCHPOINT
- DK..... GO TO T186 BRANCHPOINT
- RF..... GO TO T186 BRANCHPOINT

T907\_1  
3

Was it more than 25 percent of [his/her] life insurance settlement?

- 1. YES..... GO TO T186 BRANCHPOINT
- 5. NO
- DK..... GO TO T186 BRANCHPOINT
- RF..... GO TO T186 BRANCHPOINT

T908\_1  
3

Was it more than 10 percent of [his/her] life insurance settlement?

- 1. YES
- 5. NO
- DK
- RF

*\*\*\*END OF BLOCK\_13: LIFE INSURANCE: AMOUNT TO NON-RELATIVES  
(T902\_13 - T908\_13)*

*\*\*\*END OF T902\_9 LOOP: LIFE INSURANCE DISPERSAL.  
CONTINUE ON TO T186.*

T186 BRANCHPOINT: IF R's SPOUSE/PARTNER WAS SOLE LIFE INSURANCE BENEFICIARY (T182=1 ONLY) and A DOLLAR AMOUNT WAS GIVEN (T902\_11 > 0), GO TO T190

T186

Altogether, what was the value of the life insurance settlement?

[INSTR: DO NOT PROBE DK/RF.]

\$\_\_\_\_\_ .00 GO TO T190

DK

RF

T187-

T189

T187-T189 Unfolding Sequence

(Thinking about the value of the life insurance settlement:)

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

PROCEDURES: 3Up1Down, 2Up2Down, 1Up3Down

BREAKPOINTS: \$10,000, **\$25,000**, **\$100,000**, **\$500,000**, \$2,000,000

RANDOM ENTRY POINTS: \$25,000, \$100,000, \$500,000

ENTRY POINT ASSIGNMENT: [1 (\$100,000)] or [2 (\$25,000)] or

[{NOT 1 and NOT 2} (\$500,000)] AT X512

ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

**!! EXIT HEALTH CARE DECISIONS**

T190

Now we wish to ask some questions about healthcare decisions toward the end of R's FIRST NAME's life.

Did R's FIRST NAME provide written instructions about the treatment or care [he/she] wanted to receive during the final days of [his/her] life?

1. YES

5. NO..... GO TO T206

DK..... GO TO T206

RF..... GO TO T206

T191

T192 About when were these written instructions dated (approximately)?

T191

MONTH:

- 1. JAN
- 2. FEB
- 3. MAR
- 4. APR
- 5. MAY
- 6. JUN
- 7. JUL
- 8. AUG
- 9. SEP
- 10. OCT
- 11. NOV
- 12. DEC
- 98. DK
- 99. RF

YEAR:

---

T192

- DK
- RF

T193

Did these instructions express a desire to receive all care possible under any circumstances in order to prolong life?

- 1. YES
- 5. NO
- DK
- RF

T194

Did these instructions express a desire to limit care in certain situations?

- 1. YES?
- 5. NO?
- DK?
- RF

T195

Did these instructions express a desire to have any treatment withheld?

- 1. YES
- 5. NO
- DK
- RF

T196

(Did these instructions express a desire to) keep [him/her] comfortable and pain free but to forego extensive measures to prolong life?

- 1. YES
- 5. NO
- DK
- RF

T197

Were these instructions applicable to the actual situation?

- 1. YES
- 5. NO..... GO TO T206
- DK..... GO TO T206
- RF..... GO TO T206

**!! EXIT WHO CONSULTED ON HEALTH CARE DECISIONS**

T198

Were you consulted about whether these instructions should be followed?

- 1. YES
- 5. NO
- DK
- RF

T199

Were any (other) family members or other persons consulted?

- 1. YES
- 5. NO..... GO TO T204
- DK..... GO TO T204
- RF..... GO TO T204

T200

Who was consulted, (that is, what was their relationship to R's FIRST NAME)?

#@ op 7/23/21  
Added code frame  
option 11 #48559

[INSTR: SELECT ALL THAT APPLY.]

[INSTR: IF NECESSARY, PROBE: ANYONE ELSE?]

1. DECEASED R
2. NON-SPOUSE/PARTNER PROXY RESPONDENT
3. SPOUSE/ PARTNER
4. CHILD/CHILD-IN-LAW/ GRANDCHILD
5. OTHER RELATIVE
6. FRIEND
7. PHYSICIAN/HEALTHCARE PROFESSIONAL
8. MINISTER/RABBI/PRIEST/ RELIGIOUS ADVISOR
9. ATTORNEY
10. SOCIAL WORKER
11. LEGAL GUARDIAN
97. OTHER (SPECIFY) \_\_\_\_\_ [T201]
- DK
- RF

T202 BRANCHPOINT: IF PROXY DID NOT REPORT THAT A CHILD/GRANDCHILD  
WAS CONSULTED (T200 NOT 4), GO TO T204

T060\_T  
202

(Which child was that?)

IF GRANDCHILD:

(Which child is the parent of that grandchild?)

[INSTR: SELECT ALL THAT APPLY.]

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

3. THROUGH 52. CHILD NAME(S)  
[ROWS PROVIDED BY BLAISE AS NECESSARY]
92. UNLISTED CHILD WHO IS DECEASED
93. ALL CHILDREN
97. OTHER (SPECIFY) \_\_\_\_\_ [T203]
- DK
- RF

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

T204

Did any problems come up in trying to follow these written instructions?

- 1. YES
- 5. NO..... GO TO T206
- DK..... GO TO T206
- RF..... GO TO T206

T205

Did the physician or any other health care worker have problems following the written instructions?

- 1. YES
- 5. NO
- DK
- RF

T206

Did R's FIRST NAME (also) make any legal arrangements for a specific person or persons to make decisions about [his/her] care or medical treatment if [he/she] could not make those decisions [himself/herself]? This is sometimes called a Durable Power of Attorney for Health Care.

- 1. YES
- 5. NO..... GO TO T213
- DK..... GO TO T213
- RF..... GO TO T213

T207M



Who had that authority, (that is, what was their relationship to R's FIRST NAME)?

#@ op 7/23/21  
Added code frame  
option 11 #48559

[INSTR: SELECT ALL THAT APPLY.]

1. DECEASED R
2. NON-SPOUSE/PARTNER PROXY RESPONDENT
3. SPOUSE/ PARTNER
4. CHILD/CHILD-IN-LAW/ GRANDCHILD
5. OTHER RELATIVE
6. FRIEND
7. PHYSICIAN/HEALTHCARE PROFESSIONAL
8. MINISTER/RABBI/PRIEST/ RELIGIOUS ADVISOR
9. ATTORNEY
10. SOCIAL WORKER
11. LEGAL GUARDIAN
97. OTHER (SPECIFY) \_\_\_\_\_ [T208]
- DK
- RF

T209 BRANCHPOINT: IF PROXY DID NOT REPORT THAT A CHILD/GRANDCHILD WAS CONSULTED (T207 NOT 4), GO TO T211

T061\_T  
209

(Which child was that?)

IF GRANDCHILD:

(Which child is the parent of that grandchild?)

[INSTR: SELECT ALL THAT APPLY.]

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

3. THROUGH 52. CHILD NAME(S)  
[ROWS PROVIDED BY BLAISE AS NECESSARY]
92. UNLISTED CHILD WHO IS DECEASED
97. OTHER (SPECIFY) \_\_\_\_\_ [T210]
- DK
- RF

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

T211

T212 When was the Durable Power of Attorney for Health Care made (approximately)?

T211

MONTH:

- 1. JAN
- 2. FEB
- 3. MAR
- 4. APR
- 5. MAY
- 6. JUN
- 7. JUL
- 8. AUG
- 9. SEP
- 10. OCT
- 11. NOV
- 12. DEC
- 98. DK
- 99. RF

YEAR:

\_\_\_\_\_

T212

DK

T213

Did R's FIRST NAME ever discuss with you or anyone else the treatment or care [he/she] wanted to receive in the final days of [his/her] life?

- 1. YES
- 5. NO..... GO TO T218
- DK..... GO TO T218
- RF..... GO TO T218

T214

With whom did [he/she] discuss it, (that is, what was their relationship to R's FIRST NAME)?

[INSTR: SELECT ALL THAT APPLY.]

- 2. NON-SPOUSE/PARTNER PROXY RESPONDENT
- 3. SPOUSE/ PARTNER
- 4. CHILD/CHILD-IN-LAW/ GRANDCHILD
- 5. OTHER RELATIVE
- 6. FRIEND
- 7. PHYSICIAN/HEALTHCARE PROFESSIONAL
- 8. MINISTER/RABBI/PRIEST/ RELIGIOUS ADVISOR
- 9. ATTORNEY
- 10. SOCIAL WORKER
- 11. LEGAL GUARDIAN
- 97. OTHER (SPECIFY) \_\_\_\_\_ [ T215]
- DK
- RF

T216 BRANCHPOINT: IF PROXY DID NOT REPORT THAT A CHILD/GRANDCHILD WAS CONSULTED (T214 NOT 4), GO TO T218

T062\_T  
216

(Which child was that?)

IF GRANDCHILD:

(Which child is the parent of that grandchild?)

[INSTR: SELECT ALL THAT APPLY.]

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

- 3. THROUGH 52. CHILD NAME(S)  
[ROWS PROVIDED BY BLAISE AS NECESSARY]
- 92. UNLISTED CHILD WHO IS DECEASED
- 93. ALL CHILDREN
- 97. OTHER (SPECIFY) \_\_\_\_\_ [T217]
- DK
- RF

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

T218

#@ op 7/23/21  
Added code  
frameoption 11  
#48559

Did any decisions have to be made about the care and treatment of R's FIRST NAME during the final days of [his/her] life?

- 1. YES
- 5. NO..... GO TO T237
- DK..... GO TO T237
- RF..... GO TO T237

T219

Who was actually involved in making decisions about the care and treatment of R's FIRST NAME during the final days of [his/her] life, (that is, what was their relationship to R's FIRST NAME)?

#@ op 7/23/21  
Added code  
frameoption 11  
#48559

(Who else participated?)

[INSTR: SELECT ALL THAT APPLY.]

- 1. DECEASED R
- 2. NON-SPOUSE/PARTNER PROXY RESPONDENT
- 3. SPOUSE/ PARTNER
- 4. CHILD/CHILD-IN-LAW/ GRANDCHILD
- 5. OTHER RELATIVE
- 6. FRIEND
- 7. PHYSICIAN/HEALTHCARE PROFESSIONAL
- 8. MINISTER/RABBI/PRIEST/ RELIGIOUS ADVISOR
- 9. ATTORNEY
- 10. SOCIAL WORKER
- 11. LEGAL GUARDIAN
- 97. OTHER (SPECIFY)\_\_\_\_\_ [ T220]
- DK
- RF

T221 BRANCHPOINT: IF PROXY DID NOT REPORT THAT A CHILD/GRANDCHILD WAS CONSULTED (T219 NOT 4), GO TO T223 BRANCHPOINT

T063\_T  
221

(Which child was that?)

IF GRANDCHILD:

(Which child is the parent of that grandchild?)

[INSTR: SELECT ALL THAT APPLY.]

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

3. THROUGH 52. CHILD NAME(S)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

92. UNLISTED CHILD WHO IS DECEASED

93. ALL CHILDREN

97. OTHER (SPECIFY)\_\_\_\_\_ [T222]

DK

RF

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

T223 BRANCHPOINT: IF DECEASED R WAS AMONG THOSE CONSULTED (T219=1),  
GO TO T227 BRANCHPOINT

T223

Was R's FIRST NAME able to participate in decisions about [his/her] medical care during the final days of [his/her] life?

1. YES..... GO TO T227

5. NO

DK..... GO TO T227

RF..... GO TO T227

T224

For about how long before R's FIRST NAME (died/passed away) was [he/she] unable to participate in decisions about [his/her] medical care?

\_\_\_\_\_  
MONTHS

T224

OR

\_\_\_\_\_  
DAYS

T225

OR

\_\_\_\_\_  
YEAR

T226

DK

RF

T227 BRANCHPOINT: IF AT LEAST TWO {PEOPLE OR CATEGORY OF PERSON} PARTICIPATED IN THE DECISIONS ({ AMONG QUESTIONS T219, T221} AND T223} see NOTE, below), CONTINUE ON TO T227

OTHERWISE, GO TO T230

*NOTE: AT LEAST TWO {PEOPLE OR CATEGORY OF PERSONS} CAN BE*

*(a) NUMBER OF SELECTIONS AT {T219 or T221} > 1, or*

*(b) SELECTION OF {1. DECEASED R( AT T219 or T223=1} IN ADDITION TO ONE OTHER SELECTION AT T219, or*

*(c) MORE THAN ONE CHILD SELECTED AT T221, WHICH CAN INCLUDE (92. DECEASED CHILD(, or*

*(d) SELECTION OF (93. ALL CHILDREN( AT T221.*

T227

Who was the main decision-maker (that is, what was their relationship to R's FIRST NAME)?

#@ op 7/23/21  
Added code  
frameoption 11  
#48559

1. DECEASED R
2. NON-SPOUSE/PARTNER PROXY RESPONDENT
3. SPOUSE/ PARTNER
4. CHILD/CHILD-IN-LAW/ GRANDCHILD
5. OTHER RELATIVE
6. FRIEND
7. PHYSICIAN/HEALTHCARE PROFESSIONAL
8. MINISTER/RABBI/PRIEST/ RELIGIOUS ADVISOR
9. ATTORNEY
10. SOCIAL WORKER
11. LEGAL GUARDIAN
97. OTHER (SPECIFY)\_\_\_\_\_ [ T244]
- DK
- RF

*NOTE: RESPONSE "1. DECEASED R" APPEARS ONLY IF PROXY SAID R WAS ABLE TO PARTICIPATE IN HIS/HER OWN DECISIONS (T223=1).*

T228 BRANCHPOINT: IF PROXY DID NOT REPORT THAT A CHILD/GRANDCHILD WAS CONSULTED (T227 NOT 4), GO TO T230

IF {PROXY GAVE ONLY 1 RESPONSE TO T221 and THAT RESPONSE WAS NOT "ALL CHILDREN" (T221 NOT 93)}, GO TO T230

T243\_T  
228

(Which child was that?)

IF GRANDCHILD:

(Which child is the parent of that grandchild?)

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

3. THROUGH 52. CHILD NAME(S)

[ROWS PROVIDED BY BLAISE AS NECESSARY]

92. UNLISTED CHILD WHO IS DECEASED

97. OTHER (SPECIFY)\_\_\_\_\_ [T229]

DK

RF

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

!! EXIT TYPE OF HEALTH CARE DECISIONS

T230

Did those last decisions involve a desire to give all care possible unconditionally in order to prolong life?

- 1. YES
- 5. NO
- DK
- RF

T231

Did those last decisions involve limiting care in certain situations?

- 1. YES
- 5. NO
- DK
- RF

T232

Did those last decisions involve withholding any treatment?

- 1. YES
- 5. NO
- DK
- RF

T233

Did those last decisions rest largely on keeping R's FIRST NAME comfortable and pain free without taking extensive measures to prolong life?

- 1. YES
- 5. NO
- DK
- RF

T234

Did any doctor(s) recommend any care or treatment that the family or other decision-maker(s) ultimately refused?

- 1. YES
- 5. NO..... GO TO T236
- DK..... GO TO T236
- RF..... GO TO T236

T235



Did R's FIRST NAME receive this treatment anyway?

1. YES ☐

5. NO

DK ☐

RF

T236

Did cost enter into the decisions about what care or treatment [he/she] would receive in the final days of [his/her] life?

1. YES

5. NO

DK

RF

T259

On a scale of zero to 10, where zero is the worst possible and 10 is the best possible, in your opinion, how would you rate the overall quality of [deceased R's] last week of life?

T237

Thinking back over the course of [R NAME]'s life, what would you say were [His/her] greatest strengths?

[GO TO MODULES](#)