

Z1. INTERVIEWER CHECKPOINT: RESPONDENT: EMPLOYER/PENSION/SOCIAL SECURITY NUMBER

<input type="checkbox"/>	1. R IS COVERED BY A PENSION FROM CURRENT JOB (BOX 1 CHECKED AT Y42)
<input type="checkbox"/>	2. ALL OTHERS, (BOX 2 CHECKED AT Y42)--->GO TO Z3--BOTTOM OF THIS PAGE

Z2. I need to get just a few more pieces of information before I leave. In order to obtain the latest available information about the retirement benefits that people with work experience like yours are entitled to, we would like to contact the employer who will be providing your primary pension. For this purpose, we need to know the name and address of the employer, or other organization, that provides primary pension you expect to receive.

Z2a. EMPLOYER NAME: _____

ADDRESS: _____ / _____
NUMBER AND STREET CITY, STATE AND ZIP CODE

Z2b. PENSION PROVIDER (IF DIFFERENT): _____

ADDRESS: _____ / _____
NUMBER AND STREET CITY, STATE AND ZIP CODE

Z2c. REFUSED (EXPLAIN): _____

Z2d. What is the official title of the job from which you expect to receive your prim pension?

_____ OFFICIAL JOB TITLE

Z2e. In order to get complete information on the adequacy of pension and retirement income and to examine health care benefit information of households in our sample we would like to know your Social Security Number...(what is your Social Security Number?)

SOCIAL SECURITY NUMBER

--	--	--	--	--	--	--	--	--	--	--	--

Z2f. REFUSED (EXPLAIN): _____

NEXT PAGE, Z4

Z3. The Survey Research Center would like to obtain the latest available information about the retirement and health benefits that you and others like you can expect receive. For this reason, we would like to know your Social Security Number... (what is your Social Security Number)?

SOCIAL SECURITY NUMBER

--	--	--	--	--	--	--	--	--	--	--	--

Z3a. REFUSED (EXPLAIN): _____

NEXT PAGE, Z4

24. INTERVIEWER CHECKPOINT: SPOUSE: EMPLOYER/PENSION/SS#

<input type="checkbox"/>	3. R IS NOT MARRIED (BOX 3 CHECKED AT Y43)-->NEXT PAGE, R1
<input type="checkbox"/>	4. S IS COVERED BY A PENSION FROM CURRENT JOB (BOX 4 CHECKED AT Y43)
<input type="checkbox"/>	5. ALL OTHERS (BOX 5 CHECKED AT Y43)-->GO TO Z6--BOTTOM OF THIS PAGE

25. We would also like to obtain information about the retirement benefits that people with work experience like your (husband/wife) are entitled to receive. (In order to do this, we would like to contact the employer who will be providing (his/her) primary pension.) For this purpose, we would like to know the name and address of the employer, or other organization, that provides the primary pension that (he/she) expects to receive.

25a. EMPLOYER NAME: _____

ADDRESS: _____ / _____
NUMBER AND STREET CITY, STATE AND ZIP CODE

25b. PENSION PROVIDER (IF DIFFERENT): _____

ADDRESS: _____ / _____
NUMBER AND STREET CITY, STATE AND ZIP CODE

25c. REFUSED (EXPLAIN): _____

25d. What is the official title of the job from which (he/she) expects to receive (his/her) primary pension?

_____ OFFICIAL JOB TITLE

25e. In addition, to get complete information about your (husband's/wife's) retirement and health benefits, we would like to know (his/her) Social Security Number...(what is [his/her] Social Security Number?)

SOCIAL SECURITY NUMBER

--	--	--	--	--	--	--	--	--	--

25f. REFUSED (EXPLAIN): _____

NEXT PAGE, R1

26. (The Survey Research Center would like to obtain the latest available information about the retirement and health benefits that your [husband/wife] and others like [him/her] can expect to receive.) (For this reason,) we would like to know your (husband's/wife's) Social Security Number... (what is [his/her] Social Security Number?)

SOCIAL SECURITY NUMBER

--	--	--	--	--	--	--	--	--	--

26a. REFUSED (EXPLAIN): _____

NEXT PAGE, R1

RECONTACT INFORMATION

R1. Thank you very much for this interview. We value people like you who are willing to contribute their experiences to our research. We will be sending you a report of some of our findings as a way of expressing our appreciation for your cooperation. Our Regional Supervisor may also be calling or writing you to verify this interview. For these reasons I would like to ask for your name, address and telephone number. (FOR WOMEN OBTAIN THEIR FIRST NAME, NOT THEIR HUSBAND'S FIRST NAME.)

R1a. What is your full legal name as it appears on official documents such as your voter's registration, Social Security Card, or driver's license? (IWER: VERIFY SPELLING OF R'S FULL NAME AND WRITE CLEARLY.)

TITLE: MR MRS MISS MS DR REV NAME REFUSED
FIRST NAME MIDDLE INITIAL LAST NAME

R1b. What is your address? ADDRESS REFUSED
STREET ADDRESS
CITY STATE ZIP CODE

R2. INTERVIEWER CHECKPOINT: ADDRESS AT R1b ABOVE IS:
1. IDENTICAL TO SAMPLE LABEL ADDRESS GO TO R4
2. CORRECTED VERSION OF SAMPLE LABEL ADDRESS GO TO R4
3. DIFERENT FROM SAMPLE LABEL

R3. Is this a mailing address for your home, an address you will be moving to, a relative's address, the address of a friend, a business address, or what?
1. MAILING ADDRESS
2. ADDRESS TO WHICH R IS MOVING
3. RELATIVE
4. FRIEND
5. BUSINESS
7. OTHER:

R4. And, what is your telephone number?
AREA CODE TELEPHONE NUMBER
R HAS NO PHONE PHONE NUMBER REFUSED

NEXT PAGE, R6

R4a. (IF R MARRIED): What is your (husband's/wife's) full legal name?
FIRST MIDDLE INITIAL LAST

R5. Is your phone number listed in the current telephone directory?

1. YES, LISTED

5. NO, NOT LISTED

8. NOT SURE, DON'T KNOW



GO TO R6

R5a. Is your phone listed in your name?

1. YES

5. NO



R5b. In whose name is the phone listed? (What relation is this person to you?)

NAME

RELATIONSHIP



R6. Do you have another place of residence or somewhere else you live during different times of the year?

1. YES



R6a. We may wish to contact you at your other residence. May I have the address and phone number?

5. NO



STREET ADDRESS

ADDRESS REFUSED

CITY

STATE

ZIP

(AREA CODE)

NUMBER

R HAS NO PHONE

PHONE REFUSED

R7. If for any reason we should have difficulty contacting you, could you give me the name, address, and telephone number of a close friend or relative who will know how to get in touch with you? (And what is this person's relationship to you?)

NAME: _____

RELATIONSHIP TO R: _____

ADDRESS: _____

TELEPHONE: _____

R8. IF R REFUSED ANY RECONTACT INFORMATION: WHAT IS YOUR UNDERSTANDING OF THE REASON(S) THE INFORMATION WAS REFUSED?

(a) CALL #	(b) DATE	(c) DAY OF WEEK	(d) TIME AM/PM	(e) IWER ID	(f) CONTACT WITH R/INF/NO ONE	(g) APPT. MADE YES / NO	(h) APPT. KEPT YES/NO/INAP	(j) PROVIDE A COMPLETE DESCRIPTION OF CONTACT OR ATTEMPT TO CONTACT ON THE LINES BELOW. GIVE COMPLETE DETAILS.

(a) CALL #	(b) DATE	(c) DAY OF WEEK	(d) TIME AM/PM	(e) IWER ID	(f) CONTACT WITH R/INF/NO ONE	(g) APPT. MADE YES / NO	(h) APPT. KEPT YES/NO/INAP	(j) PROVIDE A COMPLETE DESCRIPTION OF CONTACT OR ATTEMPT TO CONTACT ON THE LINES BELOW. GIVE COMPLETE DETAILS.

(a) CALL #	(b) DATE	(c) DAY OF WEEK	(d) TIME AM/PM	(e) IWER ID	(f) CONTACT WITH R/INF/NO ONE	(g) APPT. MADE YES / NO	(h) APPT. KEPT YES/NO/INAP	(j) PROVIDE A COMPLETE DESCRIPTION OF CONTACT OR ATTEMPT TO CONTACT ON THE LINES BELOW. GIVE COMPLETE DETAILS.

(a) CALL #	(b) DATE	(c) DAY OF WEEK	(d) TIME AM/PM	(e) IWER ID	(f) CONTACT WITH R/INF/NO ONE	(g) APPT. MADE YES / NO	(h) APPT. KEPT YES/NO/INAP	(j) PROVIDE A COMPLETE DESCRIPTION OF CONTACT OR ATTEMPT TO CONTACT ON THE LINES BELOW. GIVE COMPLETE DETAILS.

(a) CALL #	(b) DATE	(c) DAY OF WEEK	(d) TIME AM/PM	(e) IWER ID	(f) CONTACT WITH R/INF/NO ONE	(g) APPT. MADE YES / NO	(h) APPT. KEPT YES/NO/INAP	(j) PROVIDE A COMPLETE DESCRIPTION OF CONTACT OR ATTEMPT TO CONTACT ON THE LINES BELOW. GIVE COMPLETE DETAILS.

(a) CALL #	(b) DATE	(c) DAY OF WEEK	(d) TIME AM/PM	(e) IWER ID	(f) CONTACT WITH R/INF/NO ONE	(g) APPT. MADE YES / NO	(h) APPT. KEPT YES/NO/INAP	(j) PROVIDE A COMPLETE DESCRIPTION OF CONTACT OR ATTEMPT TO CONTACT ON THE LINES BELOW. GIVE COMPLETE DETAILS.

CONTINUE ON A SUPPLEMENTAL CALL RECORD IF NECESSARY

13. In order to determine whom to interview, I need to know who lives here at this address--not their names, just their ages and their relationship to you. Let's start with you--how old are you? (CONTINUE LISTING ALL MEMBERS OF THIS HOUSEHOLD BY RELATIONSHIP TO INFORMANT.)

	(a) Household Members by Relationship to Informant	(b) Sex	(c) Age	(d) Enter "R" to Identify Respondent
1.	INFORMANT			
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

WHOM TO INTERVIEW -- INTERVIEWER INSTRUCTIONS

- a. If household contains only a married couple or persons living as though married, with or without children, interview the person who is most knowledgeable about the family's assets and debts.
- b. If household contains only an adult and their minor children, interview the adult.
- c. If household contains unrelated roommates who are 18 years of age or older, list the household and interview person closest to age 45 as a single person economic unit.
- d. If household contains an extended family (persons related by blood, marriage or adoption--e.g., adult married children living with parents), interview the person or persons most knowledgeable about the family's assets and debts. (FAMILY TO BE INTERVIEWED IS DETERMINED BY WHOSE NAME IS ON THE LEASE OR MORTGAGE. INTERVIEW THE MOST KNOWLEDGEABLE PERSON IN THAT FAMILY.)
- e. **If unclear whom to interview (especially in case d.)--CALL THE F.O.**
- f. NOTE: In ALL situations, the person whose occupation is asked about in Section R is considered the Respondent. Indicate R for this cover sheet in Col. (d) above.

14. We would like to conduct the interview with the person or persons in your family who are most knowledgeable about the family's assets and debts. Who would that be?
15. IF MOST KNOWLEDGEABLE PERSON IS NOT AT HOME, DETERMINE CONVENIENT TIME FOR IW (AND PHONE NUMBER IF APPROPRIATE). RECORD THIS INFORMATION IN THE CALL RECORD, ITEM 12.