

CogEcon 2017 Questions

Preface

This document contains all questions from the CogEcon 2017 web questionnaire. Section I is the Survey Module of the study; Section II demonstrates the interface of the Account Data Module of the study.

In the Survey Module, respondents received identical questions, but were randomized to answer sections pertaining to household financial wealth (Section D and Section VRI) in different orders. Additionally, respondents were randomized to receive different amount of incentives to participate in the Account Data Module. See documentation for details.

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Section I. Survey Module



Decision Making Survey 2017

For questions about the survey please
call 1-800-759-7947
or email CogUSAStudy@umich.edu

Collection: LOGIN
Contains: DATSTAT_ALTPID, PASSWORD



Question: DATSTAT_ALTPID
Required

Welcome to the Cognition and Aging in the USA Internet Decision Making Survey 2017, conducted by the University of Michigan.

If you are a study participant, please enter your username and password below.

Username:

Question: PASSWORD
Required

Password:

Password:

Welcome to the Cognition and Aging in the USA Internet Decision Making Survey 2017!

This survey is a part of the Study of Cognition and Aging in the USA. We greatly value your past participation in this study, and we hope that you will find this survey interesting to complete.

The purpose of this survey is to improve how we ask respondents about their financial assets. By asking you to tell us about your financial assets in different ways, we hope to improve future surveys to reduce the burden of response and improve data quality. These findings should lead to better understanding of financial decision-making for people like you.

We understand that some of these questions are of a personal nature. Please remember that your responses are confidential, and it helps us a great deal if you respond as completely, honestly and accurately as possible.

Some of these questions are difficult, but we think you will find them helpful in thinking about your own financial situation and decisions.

The next screen provides additional information about the survey, so that you can decide whether or not to participate.

We hope that you will enjoy taking this survey. We expect that the results will shed light on the complex decisions and situations faced by people like you.

The expected time to complete the survey is about 25 minutes. Your responses to the survey will be kept confidential. You will not be identified in any reports on this study. The study will keep your contact information to follow up with you in the future. Some of your answers may also be used in the future to reduce the number of questions we ask.

Your participation in the study is voluntary. You can skip any questions you do not wish to answer by clicking "Next." You may end your participation at any time by closing your browser. There are no risks to taking part.

For questions about this survey, please call us toll-free at 1-800-759-7947 or e-mail us at CogUSASTudy@umich.edu. If you have questions about your rights as a research participant, or wish to obtain information, ask questions, or discuss any concerns about this study with someone other than the researchers, please contact the University of Michigan Health Sciences and Behavioral Sciences Institutional Review Board, 2800 Plymouth Rd. Building 520, Room 1169. Ann Arbor, MI 48109-2800, (734) 936-0933 (or toll free, 1-866-936-0933), irbhsbs.umich.edu.

If you have read and understand the information given above, please click "Next" to begin.

Here are the basics for completing this survey:

1. Each question will ask you to do one of the following:

- **Type a number.**
- **Click on one response from a list. You may click on the appropriate response text OR the radio button. Some of these questions will have a drop-down box and you will need to click on the drop-down box and then select your choice among the options listed.**
- **Check all that apply: click on at least one checkbox OR response option text in the list provided.**

2. When you finish answering all questions on a screen, click on the "Next" button. To return to an earlier screen, click the "Back" button.

3. If you need to break off at any point in the survey and return later, simply close your browser. Your answers will be saved. When you login again you will be able to return to the place where you left off.

4. At the end of the survey, please click the "submit" button to indicate that you are done with the survey.

Helpful tip: If an unfamiliar word appears in blue, you can click on it to see the definition.

Collection: SECTION_A

Contains: A0, B_SAME_RELSTAT, B_NEW_RELSTAT, AGE_CHECK, AGE_NEW, A1, A2, A3, A4, A4AW, A_INET_QS, A4DW

Question: A0

Scale Summary		
Code	Label	Show-If
1	Excellent	
2	Very good	
3	Good	
4	Fair	

5 Poor

A0**Would you say your health is excellent, very good, good, fair, or poor?****Please click on the text or the radio button to indicate your response.**

- Excellent
- Very good
- Good
- Fair
- Poor

Question: B_SAME_RELSTAT
Show if: (RELSTAT_PRE was-answered)

Scale Summary		
Code	Label	Show-If
1	Yes	
0	No	

B_SAME_RELSTAT**When you last took the Decision Making Survey, you told us that you were . Is this still correct?**

- Yes
- No

fills with "married", "in a marriage-like relationship, and planning a financial future with your partner", "in a marriage-like relationship, but not planning a financial future with your partner", or "single" based on previous wave.

Question: B_NEW_RELSTAT
Show if: (B_SAME_RELSTAT ≠ 1:[Yes]) or (RELSTAT_PRE was-not-answered)

Scale Summary		
Code	Label	Show-If
3	Married	
2	In a marriage-like relationship, and planning a financial future with your partner	
1	In a marriage-like relationship, but not planning a financial future with your partner	
0	Single	

B_NEW_RELSTAT**Which of the following categories best represents your current relationship status?**

- Married
- In a marriage-like relationship, and planning a financial future with your partner
- In a marriage-like relationship, but not planning a financial future with your partner
- Single

Question: AGE_CHECK
Show if: (AGE_PRE was-answered)

Scale Summary		
Code	Label	Show-If
1	Yes	
0	No	

AGE_CHECK**Information you provided in an earlier survey leads us to believe that you are years old. Is this correct?**

- Yes

fills with calculated age before "years old"

No

Question: AGE_NEW

Show if: (AGE_CHECK = 0:[No]) or (AGE_CHECK was-not-answered) or (AGE_PRE was-not-answered)

AGE_NEW

Some questions in this survey will only be asked if you are of a particular age. Please tell us how old you are today.

years old

Question: A1

Scale Summary		
Code	Label	Show-If
1	Yes	
0	No	

A1

Do you use e-mail?

Yes

No

Question: A2

Show if: (A1 is-any-of 1:[Yes])

A2

What is your primary e-mail address?

Question: A3

Show if: (A1 = 1:[Yes])

Scale Summary		
Code	Label	Show-If
1	Daily	
2	3 to 4 times a week	
3	Once or twice a week	
4	2 to 3 times a month	
5	Once a month or less	

A3

How often do you check your e-mail?

Daily

3 to 4 times a week

Once or twice a week

2 to 3 times a month

Once a month or less

Question: A4

Scale Summary		
Code	Label	Show-If
1	Daily	
2	3 to 4 times a week	
3	Once or twice a week	
4	2 to 3 times a month	

5	Once a month or less	
6	Never	

A4

Other than e-mail, how often do you use the Internet (for example, to read the news, check weather, make purchases, search for information, make travel reservations, etc.)?

- Daily
 3 to 4 times a week
 Once or twice a week
 2 to 3 times a month
 Once a month or less
 Never

Question: A4AW

A4AW

Which of the following types of devices have you used in the last year?

Please click on the text or the checkbox of each desired response. Check all that apply.

- Smartphone (such as iPhone, Android phone or Blackberry)
 Laptop computer
 Tablet computer (such as iPad)
 Desktop computer
 eReader (such as Kindle or Nook)
 Gaming device (such as Wii, Xbox or Playstation) that connects to the Internet
 Internet-enabled TV or device to stream Internet video (such as Roku, Netflix or Hulu)

Collection: A_INET_QS

Contains: A4BW, A4CW, A4EW, A4FW, A4IW, A4GW, A4HW

Show if: (A1 = 1:[Yes]) and (A4 ≠ 6:[Never])

Question: A4BW

Scale Summary		
Code	Label	Show-If
1	High-speed wired or wireless Internet connection in my home	
2	High-speed wired or wireless Internet connection in my workplace	
3	Dial-up Internet connection in my home	
4	Dial-up Internet connection in my workplace	
5	Cellular network through smartphone or other device	
6	Computer at a library or community center	
7	Other	

A4BW

How do you usually connect to the Internet?

- High-speed wired or wireless Internet connection in my home
 High-speed wired or wireless Internet connection in my workplace
 Dial-up Internet connection in my home
 Dial-up Internet connection in my workplace
 Cellular network through smartphone or other device

- Computer at a library or community center
- Other

Question: A4CW

A4CW

Do you use the Internet to access any of the following?

Please check all that apply.

- Bank account
- Brokerage, retirement, or mutual fund accounts
- Credit card account
- Mortgage
- Utility or other bills
- None of the above

Question: A4EW

A4EW

Have you used the Internet for any of the following in the last year?

Please check all that apply.

- Viewing a bank balance or transaction
- Making a banking transaction or payment
- Viewing a credit card balance or activity
- Viewing a brokerage, retirement or mutual fund account
- Making a brokerage, retirement or mutual fund account transaction
- Filing a tax return
- Viewing a utility or other bill
- None of the above

Question: A4FW

A4FW

Have you used the Internet for any of the following in the last year?

Please check all that apply.

- Buying an item
- Paying a bill
- Booking travel
- Sending or receiving money
- Buying a ticket (such as sports, movies or concerts)
- Making a reservation at a restaurant
- Getting a discount coupon
- Buying or selling something using an online marketplace (such as eBay)
- Buying or selling something using an online classified site (such as Craigslist)

None of the above

Question: A4IW

A4IW

Have you used the Internet for any of the following in the last year?

Please check all that apply.

- Sending or reading email
- Calling others using Skype, Facetime, or other such services
- Getting recommendations on restaurants
- Getting recommendations on service providers (such as plumbers or electricians)
- Getting news
- Following financial markets
- Getting information about health and healthcare
- Watching movies or TV shows
- Researching (such as Ancestry.com, Dictionary.com or Wikipedia.com)
- Getting information on hobbies or interests (such as gardening, woodworking or knitting)
- Getting directions and maps
- Taking a survey (other than this one)
- Using the Internet for work
- None of the above

Question: A4GW

A4GW

Do you use any of the following social networking sites?

Please check all that apply.

- Facebook
- YouTube
- Twitter
- LinkedIn
- Pinterest
- Google Plus
- Tumblr
- Instagram
- Other (specify):
- I do not use any social networking sites

Question: A4HW

Show if: (A4GW is-any-of [Facebook] or [YouTube] or [Twitter] or [LinkedIn] or [Pinterest] or [Google Plus] or [Tumblr] or [Instagram] or [Other (specify):])

Scale Summary		
Code	Label	Show-If
1	Read content only	
2	Read content and post content/send messages	
3	Have account, but do not use	

A4HW

You indicated that you use social networking. Do you only read content or do you also post content or send messages?

- Read content only
- Read content and post content/send messages
- Have account, but do not use

Question: A4DW

A4DW

Do you use any of the following financial software and/or online services?

Please check all that apply.

- Financial software on your computer (such as Quicken)
- Online service or application that tracks your finances across different accounts (such as Mint)
- Tax software on your computer (such as TurboTax or TaxAct)
- Online service to file your tax return (such as TurboTax Online or TaxAct.com)
- Other software or online service
- None of the above

Collection: SECTION_B
 Contains: D2, B6, D3

Question: D2

Scale Summary		
Code	Label	Show-If
1	Me	
2	My	(Error!)
3	Both me and my	(Error!)
4	Someone else in the family. Please specify:	

D2

Which member of your immediate family is most knowledgeable about your family's assets, debts, and retirement planning?

- Me
- My
- Both me and my fills with "spouse" or "partner"; middle 2 answer options only shown if coupled
- Someone else in the family. Please specify:

Question: B6

Scale Summary		
Code	Label	Show-If
1	Me	
2	My and I decide together, but it is more my responsibility	(Error!)
3	My and I decide together	(Error!)
4	My and I decide together, but it is more the responsibility of my	(Error!)
5	My	(Error!)
66	We make the decisions separately	(Error!)
6	Someone else in the family. Please specify:	

B6

Who (among the members of your immediate family) makes the decisions about how to

save for retirement or manage your family's income and assets during retirement?

- Me Middle 4 options only shown if coupled; fill with "spouse" or "partner" as relevant.
- My and I decide together, but it is more my responsibility
- My and I decide together
- My and I decide together, but it is more the responsibility of my
- My
- We make the decisions separately
- Someone else in the family. Please specify:

Question: D3**Show if:** (D2 is-any-of 3:[Both me and my]) or ((D2 is-any-of 4:[Someone else in the family. Please specify:]) and (RELSTAT >= 2))

Scale Summary		
Code	Label	Show-If
1	Me	
2	My	

D3

Suppose were asked to provide information about your combined assets, debts, and retirement plans. Between , who could provide the most accurate information?

Question root and 2nd answer option fill with relevant spouse/partner language.

- Me
- My

Collection: SECTION_C**Contains:** C1, C2, C2_R, C29, C30, C31, C32, C32_1, C33-40

In the next part of the survey, we will ask questions about your income and assets. We recommend that you use account statements, tax returns, personal finance software (such as Quicken or Microsoft Money) or other account information.

We need good estimates but not necessarily exact values if they are not readily available.

Question: C1**C1**

Excluding boarders and house guests, how many people (including yourself) live in your household?

people

Question: C2**C2**

What is the total combined income of all members of your family (living here) during the past 12 months?

This includes wages or salary, net income from business, farm or rent, pensions, dividends, interest, Social Security payments, and any other money or income.

\$

**You did not complete the previous question.
If you can give an approximate value, please click "Back" to answer the question. If you cannot give an approximate value, please indicate a range below.**

9 The above text box shows above question C2_R, and only if C2 was blank.

Question: C2_R**Show if:** (C2 was-not-answered)

Scale Summary		
Code	Label	Show-If
0	\$0	
1	\$1 - \$2,500	
2	\$2,501 - \$5,000	
3	\$5,001 - \$10,000	
4	\$10,001 - \$25,000	
5	\$25,001 - \$50,000	
6	\$50,001 - \$100,000	
7	\$100,001 - \$250,000	
8	\$250,001 - \$500,000	
9	\$500,001 - \$1,000,000	
10	More than \$1,000,000	
98	Cannot provide a range	

C2_R

Which category represents the total combined income of all members of your family (living here) during the past 12 months?

This includes wages or salary, net income from business, farm or rent, pensions, dividends, interest, Social Security payments, and any other money or income.

- \$0
 \$1 - \$2,500
 \$2,501 - \$5,000
 \$5,001 - \$10,000
 \$10,001 - \$25,000
 \$25,001 - \$50,000
 \$50,001 - \$100,000
 \$100,001 - \$250,000
 \$250,001 - \$500,000
 \$500,001 - \$1,000,000
 More than \$1,000,000
 Cannot provide a range

Now we would like to ask about your employment situation and your plans for the future.

Question: C29**C29**

What is your current employment situation?

Please check all that apply.

- Working full-time (including self-employment)
 Working part-time (including self-employment)
 Unemployed and looking for work
 Temporarily laid off
 On sick leave or other leave

- Disabled
- Homemaker
- Retired
- Other (please specify):

Question: C30
Show if: (C29 is-any-of [Retired])

C30
At what age did you retire?

Age

Question: C31
Show if: (C29 is-any-of [Retired])

Scale Summary		
Code	Label	Show-If
1	Yes	
0	No	

C31
Are you completely retired?

- Yes
- No

Question: C32
Show if: (C29 is-none-of [Retired]) or (C31 = 0:[No])

C32
At what age do you plan to retire completely?

Age

Question: C32_1
Show if: ((C29 is-none-of [Retired]) or (C31 = 0:[No])) and (C32 was-not-answered)

Scale Summary		
Code	Label	Show-If
1	Yes	
0	No	

C32_1
You did not tell us at what age you plan to retire completely. Do you mean that you never plan to stop working?

- Yes
- No

Collection: C33-40
Contains: C36-40
Show if: (RELSTAT > 0)

Now, we would like to ask about your employment situation and plans for the future.

Collection: C36-40
Contains: C37, C38, C39, C40, C40_1

Question: C37
Show if: (RELSTAT > 0)

C37**What is your current employment situation?****Please check all that apply.**

- Working full-time (including self-employment)
- Working part-time (including self-employment)
- Unemployed and looking for work
- Temporarily laid off
- On sick leave or other leave
- Disabled
- Homemaker
- Retired
- Other (please specify)

Question: C38**Show if:** (C37 is-any-of [Retired])**C38****At what age did your retire?**

In C38-C40_1, spouse/partner language fills as appropriate.

Age **Question:** C39**Show if:** (C37 is-any-of [Retired])

Scale Summary		
Code	Label	Show-If
1	Yes	
0	No	

C39**Is your completely retired?**

- Yes
- No

Question: C40**Show if:** (C37 is-none-of [Retired]) or (C39 = 0:[No])**C40****At what age does your plan to retire completely?**Age **Question:** C40_1**Show if:** ((C37 is-none-of [Retired]) or (C39 = 0:[No])) and (C40 was-not-answered)

Scale Summary		
Code	Label	Show-If
1	Yes	
0	No	

C40_1**You did not tell us at what age your plans to retire completely. Do you mean that your never plans to stop working?**

- Yes
 No

Collection: SECTION_D
Contains: D15_BLOCK, D16_BLOCK, D17, D18_W_BREAK

First 2 paras
iff partnered
and plan \$
together.
Next 2 paras
if single or no
couple \$ plan

In this next section, we will ask some detailed questions about your financial situation.

Please include the [assets](#) of your as well as your own in your answers in this section of the survey.

In this next section, we will ask some detailed questions about your financial situation.

Please include only your own [assets](#) in your answers in this section of the survey.

Some of these questions may seem redundant. We ask that you do your best to respond carefully, nonetheless. An important goal of this survey is to learn which approach to asking financial information is more effective.

Collection: D15_BLOCK
Contains: D15, D15_VAL, D15_R, D15_ACCT_A-E, D15_ACCT_A-E_R, D15_ACCT_VAL_A-E, D15_ACCT_R_A-E

The next questions ask about your financial [assets](#). In answering these questions, please consult account statements, personal finance software, or other records, if possible. We will ask about total assets held in:

- 1. tax-advantaged retirement accounts, and**
- 2. financial assets held outside of tax-advantaged retirement accounts.**

After asking for each total, we will ask whether you hold specific types of assets within each of these categories. If you hold an asset, we will ask you to give an approximate value. The detailed questions are important because they provide a more complete picture of how people choose to hold their financial assets.

Please include your assets as well as your own.

If married/partnered with joint financial plan

Please include only your own assets.

If partnered without joint plan.

Question: D15

Scale Summary		
Code	Label	Show-If
1	Yes	
0	No	

D15

Do hold any [tax-advantaged retirement accounts](#) (for example, [401\(k\) plans](#), [403\(b\) plans](#), [Keoghs](#), [traditional IRAs](#) or [Roth IRAs](#))?

- Yes
 No

Fills after "do" with "you" or "you or your spouse" or "you or your partner", as relevant.
Similar fills throughout rest of survey.

Question: D15_VAL
Show if: (D15 = 1:[Yes])

D15_VAL

What is the total value of all the tax-advantaged retirement accounts (for example, [401\(k\) plans](#), [403\(b\) plans](#), [Keoghs](#), [traditional IRAs](#) or [Roth IRAs](#)) hold?

Approximate total value: \$

Fills before "hold" with "you", "you and your spouse", "you and your partner" as relevant. Similar fills throughout rest of survey.

You did not complete the previous question.
If you can give an approximate value, please click "Back" to answer the question. If you cannot give an approximate value, please indicate a range below.

Question: D15_R

Show if: (D15 = 1:[Yes]) and (D15_VAL was-not-answered)

Scale Summary		
Code	Label	Show-If
0	\$0	
1	\$1 - \$2,500	
2	\$2,501 - \$5,000	
3	\$5,001 - \$10,000	
4	\$10,001 - \$25,000	
5	\$25,001 - \$50,000	
6	\$50,001 - \$100,000	
7	\$100,001 - \$250,000	
8	\$250,001 - \$500,000	
9	\$500,001 - \$1,000,000	
10	More than \$1,000,000	
98	Cannot provide a range	

D15_R

Please indicate a range for the total value of all the tax-advantaged retirement accounts (for example, [401\(k\) plans](#), [403\(b\) plans](#), [Keoghs](#), [traditional IRAs](#) or [Roth IRAs](#)) hold.

- \$0
 \$1 - \$2,500
 \$2,501 - \$5,000
 \$5,001 - \$10,000
 \$10,001 - \$25,000
 \$25,001 - \$50,000
 \$50,001 - \$100,000
 \$100,001 - \$250,000
 \$250,001 - \$500,000
 \$500,001 - \$1,000,000
 More than \$1,000,000
 Cannot provide a range

Question Block: D15_ACCT_A-E

Contains: D15_ACCT_A, D15_ACCT_B, D15_ACCT_C, D15_ACCT_D, D15_ACCT_E

Show if: (D15 = 1:[Yes])

Scale Summary		
Code	Label	Show-If
1	Yes	
0	No	

D15_ACCT_A-E

Do hold the following types of [assets](#) in these tax-advantaged retirement accounts?

	Yes	No
Short-term assets such as money market funds,	<input type="radio"/>	<input type="radio"/>

CDs, and short-term <u>Treasury bills</u>.		
<u>Mutual funds</u> that hold both <u>stocks</u> and <u>bonds</u>, such as balanced or life-cycle funds.	<input type="radio"/>	<input type="radio"/>
Individual <u>stocks</u> or stock <u>mutual funds</u> such as equity, index, growth, and value funds.	<input type="radio"/>	<input type="radio"/>
<u>Bond</u> funds, fixed income funds, or municipal, corporate or long-term government bonds.	<input type="radio"/>	<input type="radio"/>
Other tax-advantaged retirement savings not mentioned above.	<input type="radio"/>	<input type="radio"/>

**You did not complete the previous question(s).
Your answers are important to us. Please try to answer as best you can.**

Question Block: D15_ACCT_A-E_R
Contains: D15_ACCT_A_R, D15_ACCT_B_R, D15_ACCT_C_R, D15_ACCT_D_R, D15_ACCT_E_R
 Show if: (D15 = 1:[Yes]) and ((D15_ACCT_A was-not-answered) or (D15_ACCT_B was-not-answered) or (D15_ACCT_C was-not-answered) or (D15_ACCT_D was-not-answered) or (D15_ACCT_E was-not-answered))

Scale Summary		
Code	Label	Show-If
1	Yes	
0	No	
99	Don't know	

D15_ACCT_A-E

Do hold the following types of assets in these tax-advantaged retirement accounts?

	Yes	No	Don't know
Short-term assets such as <u>money market funds</u>, <u>CDs</u>, and short-term <u>Treasury bills</u>.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<u>Mutual funds</u> that hold both <u>stocks</u> and <u>bonds</u>, such as balanced or life-cycle funds.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Individual <u>stocks</u> or stock <u>mutual funds</u> such as equity, index, growth, and value funds.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<u>Bond</u> funds, fixed income funds, or municipal, corporate or long-term government bonds.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other tax-advantaged retirement savings not mentioned above.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

You told us that the total value of tax-advantaged retirement accounts hold is . The amounts held in the types of assets mentioned below should sum approximately to this amount.

Question Block: D15_ACCT_VAL_A-E
Contains: D15_ACCT_VAL_A, D15_ACCT_VAL_B, D15_ACCT_VAL_C, D15_ACCT_VAL_D, D15_ACCT_VAL_E
 Show if: (D15_ACCT_A = 1:[Yes]) or (D15_ACCT_D = 1:[Yes]) or (D15_ACCT_B = 1:[Yes]) or (D15_ACCT_C = 1:[Yes]) or (D15_ACCT_E = 1:[Yes]) or (D15_ACCT_A_R = 1:[Yes]) or (D15_ACCT_B_R = 1:[Yes]) or (D15_ACCT_C_R = 1:[Yes]) or (D15_ACCT_D_R = 1:[Yes])

or (D15_ACCT_E_R = 1:[Yes])

D15_ACCT_VAL

What is the total value of each of the following types of **assets** hold in tax-advantaged retirement accounts?

Current Total: **\$0**

Short-term assets such as money market funds , CDs , and short-term Treasury bills .	Approximate value: \$ <input type="text"/>
Mutual funds that hold both stocks and bonds , such as balanced or life-cycle funds.	Approximate value: \$ <input type="text"/>
Individual stocks or stock mutual funds such as equity, index, growth, and value funds.	Approximate value: \$ <input type="text"/>
Bond funds, fixed income funds, or municipal, corporate or long-term government bonds.	Approximate value: \$ <input type="text"/>
Other tax-advantaged retirement savings not mentioned above.	Approximate value: \$ <input type="text"/>

**You did not complete the previous question.
If you can give an approximate value, please click "Back" to answer the question. If you cannot give an approximate value, please indicate a range below.**

fills total from D15_val

You told us that the total value of tax-advantaged retirement accounts hold is , but you did not give us the breakdown of this total on the previous page. Please click "back" to provide approximate values for each asset type. If you cannot provide approximate values, please indicate ranges below.

Fills with holding type and values given in previous question.

Together with the values shown above, the amounts held in the types of assets listed below (for which you have not yet given a value) should sum approximately to .

fills range from D15_R

Question Block: D15_ACCT_R_A-E

Contains: D15_ACCT_R_A, D15_ACCT_R_B, D15_ACCT_R_C, D15_ACCT_R_D, D15_ACCT_R_E

Show if: (((D15_ACCT_A = 1:[Yes]) or (D15_ACCT_A_R = 1:[Yes])) and (D15_ACCT_VAL_A was-not-answered)) or (((D15_ACCT_D = 1:[Yes]) or (D15_ACCT_D_R = 1:[Yes])) and (D15_ACCT_VAL_D was-not-answered)) or (((D15_ACCT_B = 1:[Yes]) or (D15_ACCT_B_R = 1:[Yes])) and (D15_ACCT_VAL_B was-not-answered)) or (((D15_ACCT_C = 1:[Yes]) or (D15_ACCT_C_R = 1:[Yes])) and (D15_ACCT_VAL_C was-not-answered)) or (((D15_ACCT_E = 1:[Yes]) or (D15_ACCT_E_R = 1:[Yes])) and (D15_ACCT_VAL_E was-not-answered))

Scale Summary		
Code	Label	Show-If
0	\$0	
1	\$1 - \$2,500	
2	\$2,501 - \$5,000	
3	\$5,001 - \$10,000	
4	\$10,001 - \$25,000	
5	\$25,001 - \$50,000	
6	\$50,001 - \$100,000	
7	\$100,001 - \$250,000	
8	\$250,001 - \$500,000	
9	\$500,001 - \$1,000,000	
10	More than \$1,000,000	
98	Cannot provide a range	

D15_ACCT_R_A-E

Please indicate a range for the following types of **assets** hold in tax-advantaged retirement accounts.

Short-term assets such as money market funds , CDs , and short-term Treasury bills .	-- Select One --
Mutual funds that hold both stocks and bonds , such as balanced or life-cycle funds.	-- Select One --
Individual stocks or stock mutual funds such as equity, index, growth, and value funds.	-- Select One --
Bond funds, fixed income funds, or municipal, corporate or long-term government bonds.	-- Select One --
Other tax-advantaged retirement savings not mentioned above.	-- Select One --

Collection: D16_BLOCK

Contains: D16, D16_R, D16_ACCT, D16_ACCT_R, D16_ACCT_VAL_A-E, D16_ACCT_R_A-E

Now, please think about the other financial **assets** outside of tax-advantaged retirement accounts hold.

Question: D16

D16

What is the total value of all the financial **assets** hold **outside of tax-advantaged retirement accounts**? Your other financial assets could include bank accounts, **money market funds**, cash, **CDs**, **bonds**, **stocks**, **mutual funds**, or any other types of financial assets we have not yet mentioned.

Approximate total value: \$

**You did not complete the previous question.
If you can give an approximate value, please click "Back" to answer the question. If you cannot give an approximate value, please indicate a range below.**

Question: D16_R

Show if: (D16 was-not-answered)

Scale Summary		
Code	Label	Show-If

0	\$0	
1	\$1 - \$2,500	
2	\$2,501 - \$5,000	
3	\$5,001 - \$10,000	
4	\$10,001 - \$25,000	
5	\$25,001 - \$50,000	
6	\$50,001 - \$100,000	
7	\$100,001 - \$250,000	
8	\$250,001 - \$500,000	
9	\$500,001 - \$1,000,000	
10	More than \$1,000,000	
98	Cannot provide a range	

D16_R

Please indicate a range for the total value of all the financial **assets** hold outside of tax-advantage retirement accounts. *Your other financial assets could include bank accounts, **money market funds**, cash, **CDs**, **bonds**, **stocks**, **mutual funds**, or any other types of financial assets we have not yet mentioned.*

- \$0
 \$1 - \$2,500
 \$2,501 - \$5,000
 \$5,001 - \$10,000
 \$10,001 - \$25,000
 \$25,001 - \$50,000
 \$50,001 - \$100,000
 \$100,001 - \$250,000
 \$250,001 - \$500,000
 \$500,001 - \$1,000,000
 More than \$1,000,000
 Cannot provide a range

Question Block: D16_ACCT

Contains: D16_ACCT_A, D16_ACCT_B, D16_ACCT_C, D16_ACCT_D, D16_ACCT_E

Scale Summary		
Code	Label	Show-If
1	Yes	
0	No	

D16_ACCT_A-E

Do hold the following types of **assets** outside of tax-advantaged retirement accounts?

	Yes	No
Short-term assets such as cash, bank accounts, money market funds, CDs, and short-term Treasury bills.	<input type="radio"/>	<input type="radio"/>
Mutual funds that hold both stocks and bonds, such as balanced or life-cycle funds.	<input type="radio"/>	<input type="radio"/>
Individual stocks or stock mutual funds such as equity, index, growth, and value funds.	<input type="radio"/>	<input type="radio"/>
Bond funds, fixed income funds, or municipal, corporate or long-term government		

bonds.	<input type="radio"/>	<input type="radio"/>
Other financial assets not mentioned above.	<input type="radio"/>	<input type="radio"/>

**You did not complete the previous question(s).
Your answers are important to us. Please try to answer as best you can.**

Question Block: D16_ACCT_R
Contains: D16_ACCT_A_R, D16_ACCT_B_R, D16_ACCT_C_R, D16_ACCT_D_R, D16_ACCT_E_R
 Show if: (D16_ACCT_A was-not-answered) or (D16_ACCT_B was-not-answered) or (D16_ACCT_C was-not-answered) or (D16_ACCT_D was-not-answered) or (D16_ACCT_E was-not-answered)

Scale Summary		
Code	Label	Show-If
1	Yes	
0	No	
99	Don't know	

D16_ACCT_A-E

Do hold the following types of assets outside of tax-advantaged retirement accounts?

	Yes	No	Don't know
Short-term assets such as cash, bank accounts, <u>money market funds</u>, <u>CDs</u>, and short-term <u>Treasury bills</u>.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<u>Mutual funds</u> that hold both <u>stocks</u> and <u>bonds</u>, such as balanced or life-cycle funds.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Individual <u>stocks</u> or stock <u>mutual funds</u> such as equity, index, growth, and value funds.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<u>Bond</u> funds, fixed income funds, or municipal, corporate or long-term government bonds.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other financial assets not mentioned above.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

You told us that the total value of all the financial assets hold, outside of tax-advantaged retirement accounts, is . The amounts held in the types of assets mentioned below should sum approximately to this amount.

Question Block: D16_ACCT_VAL_A-E
Contains: D16_ACCT_VAL_A, D16_ACCT_VAL_B, D16_ACCT_VAL_C, D16_ACCT_VAL_D, D16_ACCT_VAL_E
 Show if: (D16_ACCT_A = 1:[Yes]) or (D16_ACCT_D = 1:[Yes]) or (D16_ACCT_B = 1:[Yes]) or (D16_ACCT_C = 1:[Yes]) or (D16_ACCT_E = 1:[Yes]) or (D16_ACCT_A_R = 1:[Yes]) or (D16_ACCT_B_R = 1:[Yes]) or (D16_ACCT_C_R = 1:[Yes]) or (D16_ACCT_D_R = 1:[Yes]) or (D16_ACCT_E_R = 1:[Yes])

D16_ACCT_VAL_A-E

What is the total value of each of the following types of assets hold, outside of tax-advantaged retirement accounts?

Current Total:

--	--

Short-term assets such as cash, bank accounts, money market funds, CDs, and short-term Treasury bills.	Approximate value: \$ <input type="text"/>
Mutual funds that hold both stocks and bonds, such as balanced or life-cycle funds.	Approximate value: \$ <input type="text"/>
Individual stocks or stock mutual funds such as equity, index, growth, and value funds.	Approximate value: \$ <input type="text"/>
Bond funds, fixed income funds, or municipal, corporate or long-term government bonds.	Approximate value: \$ <input type="text"/>
Other financial assets not mentioned above.	Approximate value: \$ <input type="text"/>

**You did not complete the previous question.
If you can give an approximate value, please click "Back" to answer the question. If you cannot give an approximate value, please indicate a range below.**

You told us that the total value of financial assets hold outside of tax-advantaged retirement accounts is . but you did not give us the breakdown of this total on the previous page. Please click "back" to provide approximate values for each asset type. If you cannot provide approximate values, please indicate ranges below.

Together with the values shown above, the amounts held in the types of assets listed below (for which you have not yet given a value) should sum approximately to .

Question Block: D16_ACCT_R_A-E
Contains: D16_ACCT_R_A, D16_ACCT_R_B, D16_ACCT_R_C, D16_ACCT_R_D, D16_ACCT_R_E
 Show if: (((D16_ACCT_A = 1:[Yes]) or (D16_ACCT_A_R = 1:[Yes])) and (D16_ACCT_VAL_A was-not-answered)) or (((D16_ACCT_B = 1:[Yes]) or (D16_ACCT_B_R = 1:[Yes])) and (D16_ACCT_VAL_B was-not-answered)) or (((D16_ACCT_C = 1:[Yes]) or (D16_ACCT_C_R = 1:[Yes])) and (D16_ACCT_VAL_C was-not-answered)) or (((D16_ACCT_D = 1:[Yes]) or (D16_ACCT_D_R = 1:[Yes])) and (D16_ACCT_VAL_D was-not-answered)) or (((D16_ACCT_E = 1:[Yes]) or (D16_ACCT_E_R = 1:[Yes])) and (D16_ACCT_VAL_E was-not-answered))

Scale Summary		
Code	Label	Show-If
0	\$0	
1	\$1 - \$2,500	
2	\$2,501 - \$5,000	
3	\$5,001 - \$10,000	
4	\$10,001 - \$25,000	
5	\$25,001 - \$50,000	
6	\$50,001 - \$100,000	
7	\$100,001 - \$250,000	
8	\$250,001 - \$500,000	
9	\$500,001 - \$1,000,000	
10	More than \$1,000,000	
98	Cannot provide a range	

D16_ACCT_R_A-E

Please indicate a range for the following types of [assets](#) hold, outside of tax-advantaged retirement accounts.

Short-term assets such as cash, bank accounts, money market funds, CDs, and	<input style="width: 90%;" type="text" value="-- Select One --"/>
--	---

short-term Treasury bills.	
Mutual funds that hold both stocks and bonds, such as balanced or life-cycle funds.	-- Select One --
Individual stocks or stock mutual funds such as equity, index, growth, and value funds.	-- Select One --
Bond funds, fixed income funds, or municipal, corporate or long-term government bonds.	-- Select One --
Other financial assets not mentioned above.	-- Select One --

Now we want to ask about the total value of stocks you hold, including [stock](#) in individual companies and stock in [mutual funds](#). Please think about the totals for both the tax-advantaged and other accounts.

Question: D17

Scale Summary		
Code	Label	Show-If
1	Yes	
0	No	
99	Don't know (Error!) or (D17 is-any-of 99:[Don't know])	

D17

Do have at least \$5,000 in [stocks](#) or in stock [mutual funds](#)?

- Yes
- No
- Don't know

Collection: D18_W_BREAK
Contains: D18
Show if: (D17 = 1:[Yes])

Question: D18

Scale Summary		
Code	Label	Show-If
0	No assets in stocks 0%	
1	10%	
2	20%	
3	30%	
4	40%	
5	50%	
6	60%	
7	70%	
8	80%	
9	90%	
10	All assets in stocks 100%	

D18

Thinking about all of the financial [assets](#) hold, approximately what percent of your financial assets do you hold in [stocks](#) or stock [mutual funds](#)?

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

No assets in stocks										All assets in stocks
0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Collection: SECTION_VRI

Contains: JOINT_OR_SEP, ACCT_TYPE_TABLE, ACCT_NUM_TABLE, ACCT_NAME_TABLE, RVW_ENUM_NAME, RVW_ENUM_NAME_CHG, ACCT_VAL_TABLE, RVW_ALL_CHECKS, RVW_ALL_CHG, RVW_ALL_RECORD_TABLE, PCT_STOCK_TABLE, ACCESS_ELEC_TABLE, RVW_ALL_TABLE

See
VRI_INTRO 1
in appendix

In the next section we are going to ask you to provide information on the type and value of financial assets and accounts that you hold. You may wish to consult account statements or online resources if they will help you respond.

Once you click the 'Next' button below you will no longer be able to use the 'Back' button. You will need to wait until the question that asks if you want to go back and make changes to be able to do so. Please consider your responses carefully as you enter them.

Question: JOINT_OR_SEP

Show if: (RELSTAT = 1) or (RELSTAT = 2) or (RELSTAT = 3)

Scale Summary		
Code	Label	Show-If
1	We have mostly joint accounts.	
2	We have individual or joint accounts, but mostly make our financial plans as if we owned the accounts jointly.	
3	We keep separate finances and have independent financial plans.	

VRI_Q56

What best describes how manage your financial assets?

Please select one.

- We have mostly joint accounts.
- We have individual or joint accounts, but mostly make our financial plans as if we owned the accounts jointly.
- We keep separate finances and have independent financial plans.

Your previous responses are shown below. Please change your responses in this table.

Question Block: ACCT_TYPE_TABLE

Contains: ACCT_TYPE_A, ACCT_TYPE_B, ACCT_TYPE_C, ACCT_TYPE_O, ACCT_TYPE_D, ACCT_TYPE_E, ACCT_TYPE_F, ACCT_TYPE_G, ACCT_TYPE_H, ACCT_TYPE_I, ACCT_TYPE_J, ACCT_TYPE_K, ACCT_TYPE_L, ACCT_TYPE_M, ACCT_TYPE_N

Scale Summary		
Code	Label	Show-If
1	Yes	
0	No	

VRI_Q57

Which of the following types of investment, savings, and retirement accounts do you have?

Please select all account types that you own. You may have more than one account of any given type. For each account that you own, please include it under only one type of account.

	Yes	No
Tax-deferred retirement accounts		
IRA (including ROTH, traditional, an IRA rolled-over from an employer-sponsored	<input type="radio"/>	<input type="radio"/>

plan)		
Employer-sponsored retirement plan account (401(k), 403(b), 457, etc.)	<input type="radio"/>	<input type="radio"/>
Pension with an account balance which you can access as a lump sum	<input type="radio"/>	<input type="radio"/>
Other type of tax-deferred retirement account (such as SEPs, Keoghs, etc.)	<input type="radio"/>	<input type="radio"/>
Savings/investment accounts that are not in a tax-deferred retirement plan or account		
Checking account	<input type="radio"/>	<input type="radio"/>
Savings account	<input type="radio"/>	<input type="radio"/>
Money market account	<input type="radio"/>	<input type="radio"/>
Mutual fund account (other than money market mutual fund)	<input type="radio"/>	<input type="radio"/>
Certificate of Deposit (CD) portfolio (aggregate of all CD holdings)	<input type="radio"/>	<input type="radio"/>
Brokerage account (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets)	<input type="radio"/>	<input type="radio"/>
Directly held securities or other financial assets (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment Programs.)	<input type="radio"/>	<input type="radio"/>
Insurance contracts/accounts with a cash value or balance		
Annuity accounts with a balance or cash value (Exclude immediate annuities reported in the income section.)	<input type="radio"/>	<input type="radio"/>
Life insurance with cash value (Exclude term life insurance.)	<input type="radio"/>	<input type="radio"/>
Educational accounts		
Section 529 College Savings Plans or Coverdell Accounts	<input type="radio"/>	<input type="radio"/>
Other accounts		
Other accounts not specified above	<input type="radio"/>	<input type="radio"/>

Jump-To: JUMP_NO_TYPE

Description:

Jump-To-Item: SECTION_H

Jump-If: ((ACCT_TYPE_A was-not-answered) or (ACCT_TYPE_A = 0:[No])) and ((ACCT_TYPE_B was-not-answered) or (ACCT_TYPE_B = 0:[No])) and ((ACCT_TYPE_C was-not-answered) or (ACCT_TYPE_C = 0:[No])) and ((ACCT_TYPE_D was-not-answered) or (ACCT_TYPE_D = 0:[No])) and ((ACCT_TYPE_E was-not-answered) or (ACCT_TYPE_E = 0:[No])) and ((ACCT_TYPE_F was-not-answered) or (ACCT_TYPE_F = 0:[No])) and ((ACCT_TYPE_G was-not-answered) or (ACCT_TYPE_G = 0:[No])) and ((ACCT_TYPE_H was-not-answered) or (ACCT_TYPE_H = 0:[No])) and ((ACCT_TYPE_I was-not-answered) or (ACCT_TYPE_I = 0:[No])) and ((ACCT_TYPE_J was-not-answered) or (ACCT_TYPE_J = 0:[No])) and ((ACCT_TYPE_K was-not-answered) or (ACCT_TYPE_K = 0:[No])) and ((ACCT_TYPE_L was-not-answered) or (ACCT_TYPE_L = 0:[No])) and ((ACCT_TYPE_M was-not-answered) or (ACCT_TYPE_M = 0:[No])) and ((ACCT_TYPE_N was-not-answered) or (ACCT_TYPE_N = 0:[No]))

Your previous responses are shown below. Please change your responses in this table.

Question Block: ACCT_NUM_TABLE

Contains: ACCT_NUM_A, ACCT_NUM_B, ACCT_NUM_C, ACCT_NUM_O, ACCT_NUM_D, ACCT_NUM_E, ACCT_NUM_F, ACCT_NUM_G, ACCT_NUM_H, ACCT_NUM_I, ACCT_NUM_J, ACCT_NUM_K, ACCT_NUM_L, ACCT_NUM_M, ACCT_NUM_N

Show if: (ACCT_TYPE_A = 1:[Yes]) or (ACCT_TYPE_B = 1:[Yes]) or (ACCT_TYPE_C = 1:[Yes]) or (ACCT_TYPE_O = 1:[Yes]) or (ACCT_TYPE_D = 1:[Yes]) or (ACCT_TYPE_E = 1:[Yes]) or (ACCT_TYPE_F = 1:[Yes]) or (ACCT_TYPE_G = 1:[Yes]) or (ACCT_TYPE_H = 1:[Yes]) or (ACCT_TYPE_I = 1:[Yes]) or (ACCT_TYPE_J = 1:[Yes]) or (ACCT_TYPE_K = 1:[Yes]) or (ACCT_TYPE_L = 1:[Yes]) or (ACCT_TYPE_M = 1:[Yes]) or (ACCT_TYPE_N = 1:[Yes])

Scale Summary		
Code	Label	Show-If
1	1	
2	2	
3	3	
4	4	
5	5	
6	6	
7	7	
8	8	
9	9	
10	10	

VRI_Q58

You mentioned that you have the following types of investment, savings, and retirement accounts. How many of each type do you household have?

Note: when you are counting, do not count the subcomponents of an account separately. You can just count the overall account.

Please indicate the number after each.

IRA (including ROTH, traditional, an IRA rolled-over from an employer-sponsored plan)	-- Select One -- ▾
Employer-sponsored retirement plan account (401(k), 403(b), 457, etc.)	-- Select One -- ▾
Pension with an account balance which you can access as a lump sum	-- Select One -- ▾
Other type of tax-deferred retirement account (such as SEPs, Keoghs, etc.)	-- Select One -- ▾
Checking account	-- Select One -- ▾
Savings account	-- Select One -- ▾
Money market account	-- Select One -- ▾
Mutual fund account (other than money market mutual fund)	-- Select One -- ▾
Certificate of deposit (CD) portfolio (aggregate of all CD holdings)	-- Select One -- ▾
Brokerage account (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets)	-- Select One -- ▾
Directly held securities or other financial assets (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment Programs.)	-- Select One -- ▾
Annuity accounts with a balance or cash value (Exclude immediate annuities reported in the income section.)	-- Select One -- ▾
Life insurance with cash value (Exclude term life insurance.)	-- Select One -- ▾
Section 529 College Savings Plans or Coverdell Accounts	-- Select One -- ▾
Other accounts not specified above	-- Select One -- ▾

Jump-To: JUMP_NO_NUM

Description:

Jump-To-Item: SECTION_H

Jump-If: (ACCT_NUM_A was-not-answered) and (ACCT_NUM_B was-not-answered) and (ACCT_NUM_C was-not-answered) and (ACCT_NUM_O was-not-answered) and (ACCT_NUM_D was-not-answered) and (ACCT_NUM_E was-not-answered) and (ACCT_NUM_F was-not-answered) and (ACCT_NUM_G was-not-answered) and (ACCT_NUM_H was-not-answered) and (ACCT_NUM_I was-not-answered) and (ACCT_NUM_J was-not-answered) and (ACCT_NUM_K was-not-answered) and (ACCT_NUM_L was-not-answered) and (ACCT_NUM_M was-not-answered) and (ACCT_NUM_N was-not-answered)

Your previous responses are shown below. Please change your responses in this table.

We will ask you a few more questions about each of the accounts you told us about on the previous screen. Please give each account a "nickname."

The nickname you assign could be any name, as long as it helps you keep track of which specific investment or savings account you are responding about in future questions. Nicknames should be descriptive and are meant to help you remember which accounts you are telling us about.

For example, if your household has two IRAs, one 401(k), and one checking account, you might name your accounts:

- **IRA 1: My IRA**
- **IRA 2: Mary’s IRA**
- **Employer-sponsored retirement plan (401(k), 403(b), 457, etc.) 1: Her 401(k)**
- **Checking account 1: Joint checking account at credit union**

Question Block: ACCT_NAME_TABLE
Contains: ACCT_NAME_A_1, ACCT_NAME_A_2, ACCT_NAME_A_3, ACCT_NAME_A_4, ACCT_NAME_A_5, ACCT_NAME_A_6, ACCT_NAME_A_7, ACCT_NAME_A_8, ACCT_NAME_A_9, ACCT_NAME_A_10, ACCT_NAME_B_1, ACCT_NAME_B_2, ACCT_NAME_B_3, ACCT_NAME_B_4, ACCT_NAME_B_5, ACCT_NAME_B_6, ACCT_NAME_B_7, ACCT_NAME_B_8, ACCT_NAME_B_9, ACCT_NAME_B_10, ACCT_NAME_C_1, ACCT_NAME_C_2, ACCT_NAME_C_3, ACCT_NAME_C_4, ACCT_NAME_C_5, ACCT_NAME_C_6, ACCT_NAME_C_7, ACCT_NAME_C_8, ACCT_NAME_C_9, ACCT_NAME_C_10, ACCT_NAME_O_1, ACCT_NAME_O_2, ACCT_NAME_O_3, ACCT_NAME_O_4, ACCT_NAME_O_5, ACCT_NAME_O_6, ACCT_NAME_O_7, ACCT_NAME_O_8, ACCT_NAME_O_9, ACCT_NAME_O_10, ACCT_NAME_D_1, ACCT_NAME_D_2, ACCT_NAME_D_3, ACCT_NAME_D_4, ACCT_NAME_D_5, ACCT_NAME_D_6, ACCT_NAME_D_7, ACCT_NAME_D_8, ACCT_NAME_D_9, ACCT_NAME_D_10, ACCT_NAME_E_1, ACCT_NAME_E_2, ACCT_NAME_E_3, ACCT_NAME_E_4, ACCT_NAME_E_5, ACCT_NAME_E_6, ACCT_NAME_E_7, ACCT_NAME_E_8, ACCT_NAME_E_9, ACCT_NAME_E_10, ACCT_NAME_F_1, ACCT_NAME_F_2, ACCT_NAME_F_3, ACCT_NAME_F_4, ACCT_NAME_F_5, ACCT_NAME_F_6, ACCT_NAME_F_7, ACCT_NAME_F_8, ACCT_NAME_F_9, ACCT_NAME_F_10, ACCT_NAME_G_1, ACCT_NAME_G_2, ACCT_NAME_G_3, ACCT_NAME_G_4, ACCT_NAME_G_5, ACCT_NAME_G_6, ACCT_NAME_G_7, ACCT_NAME_G_8, ACCT_NAME_G_9, ACCT_NAME_G_10, ACCT_NAME_H_1, ACCT_NAME_H_2, ACCT_NAME_H_3, ACCT_NAME_H_4, ACCT_NAME_H_5, ACCT_NAME_H_6, ACCT_NAME_H_7, ACCT_NAME_H_8, ACCT_NAME_H_9, ACCT_NAME_H_10, ACCT_NAME_I_1, ACCT_NAME_I_2, ACCT_NAME_I_3, ACCT_NAME_I_4, ACCT_NAME_I_5, ACCT_NAME_I_6, ACCT_NAME_I_7, ACCT_NAME_I_8, ACCT_NAME_I_9, ACCT_NAME_I_10, ACCT_NAME_J_1, ACCT_NAME_J_2, ACCT_NAME_J_3, ACCT_NAME_J_4, ACCT_NAME_J_5, ACCT_NAME_J_6, ACCT_NAME_J_7, ACCT_NAME_J_8, ACCT_NAME_J_9, ACCT_NAME_J_10, ACCT_NAME_K_1, ACCT_NAME_K_2, ACCT_NAME_K_3, ACCT_NAME_K_4, ACCT_NAME_K_5, ACCT_NAME_K_6, ACCT_NAME_K_7, ACCT_NAME_K_8, ACCT_NAME_K_9, ACCT_NAME_K_10, ACCT_NAME_L_1, ACCT_NAME_L_2, ACCT_NAME_L_3, ACCT_NAME_L_4, ACCT_NAME_L_5, ACCT_NAME_L_6, ACCT_NAME_L_7, ACCT_NAME_L_8, ACCT_NAME_L_9, ACCT_NAME_L_10, ACCT_NAME_M_1, ACCT_NAME_M_2, ACCT_NAME_M_3, ACCT_NAME_M_4, ACCT_NAME_M_5, ACCT_NAME_M_6, ACCT_NAME_M_7, ACCT_NAME_M_8, ACCT_NAME_M_9, ACCT_NAME_M_10, ACCT_NAME_N_1, ACCT_NAME_N_2, ACCT_NAME_N_3, ACCT_NAME_N_4, ACCT_NAME_N_5, ACCT_NAME_N_6, ACCT_NAME_N_7, ACCT_NAME_N_8, ACCT_NAME_N_9, ACCT_NAME_N_10
 Show if: ((ACCT_TYPE_A = 1:[Yes]) or (ACCT_TYPE_B = 1:[Yes]) or (ACCT_TYPE_C = 1:[Yes]) or (ACCT_TYPE_O = 1:[Yes]) or (ACCT_TYPE_D = 1:[Yes]) or (ACCT_TYPE_E = 1:[Yes]) or (ACCT_TYPE_F = 1:[Yes]) or (ACCT_TYPE_G = 1:[Yes]) or (ACCT_TYPE_H = 1:[Yes]) or (ACCT_TYPE_I = 1:[Yes]) or (ACCT_TYPE_J = 1:[Yes]) or (ACCT_TYPE_K = 1:[Yes]) or (ACCT_TYPE_L = 1:[Yes]) or (ACCT_TYPE_M = 1:[Yes]) or (ACCT_TYPE_N = 1:[Yes])) and ((ACCT_NUM_A >= 1:[1]) or (ACCT_NUM_B >= 1:[1]) or (ACCT_NUM_C >= 1:[1]) or (ACCT_NUM_O >= 1:[1]) or (ACCT_NUM_D >= 1:[1]) or (ACCT_NUM_E >= 1:[1]) or (ACCT_NUM_F >= 1:[1]) or (ACCT_NUM_G >= 1:[1]) or (ACCT_NUM_H >= 1:[1]) or (ACCT_NUM_I >= 1:[1]) or (ACCT_NUM_J >= 1:[1]) or (ACCT_NUM_L >= 1:[1]) or (ACCT_NUM_M >= 1:[1]) or (ACCT_NUM_N >= 1:[1]))

VRI_Q59 Only the subset of account types respondent told us they hold will be shown. See Appendix for details. **Please enter a nickname for each account below.**

IRA (including ROTH, traditional, an IRA rolled-over from an employer-sponsored plan)	<input type="text"/>
IRA 2 (including ROTH, traditional, an IRA rolled-over from an employer-sponsored plan)	<input type="text"/>
IRA 3 (including ROTH, traditional, an IRA rolled-over from an employer-sponsored plan)	<input type="text"/>
IRA 4 (including ROTH, traditional, an IRA rolled-over from an employer-sponsored plan)	<input type="text"/>
IRA 5 (including ROTH, traditional, an IRA rolled-over from an employer-sponsored plan)	<input type="text"/>
IRA 6 (including ROTH, traditional, an IRA rolled-over from an employer-sponsored plan)	<input type="text"/>
IRA 7 (including ROTH, traditional, an IRA rolled-over from an employer-sponsored plan)	<input type="text"/>
IRA 8 (including ROTH, traditional, an IRA rolled-over from an employer-sponsored plan)	<input type="text"/>

IRA 9 (including ROTH, traditional, an IRA rolled-over from an employer-sponsored plan)	<input type="text"/>
IRA 10 (including ROTH, traditional, an IRA rolled-over from an employer-sponsored plan)	<input type="text"/>
Employer-sponsored retirement plan account (401(k), 403(b), 457, etc.)	<input type="text"/>
Employer-sponsored retirement plan account 2 (401(k), 403(b), 457, etc.)	<input type="text"/>
Employer-sponsored retirement plan account 3 (401(k), 403(b), 457, etc.)	<input type="text"/>
Employer-sponsored retirement plan account 4 (401(k), 403(b), 457, etc.)	<input type="text"/>
Employer-sponsored retirement plan account 5 (401(k), 403(b), 457, etc.)	<input type="text"/>
Employer-sponsored retirement plan account 6 (401(k), 403(b), 457, etc.)	<input type="text"/>
Employer-sponsored retirement plan account 7 (401(k), 403(b), 457, etc.)	<input type="text"/>
Employer-sponsored retirement plan account 8 (401(k), 403(b), 457, etc.)	<input type="text"/>
Employer-sponsored retirement plan account 9 (401(k), 403(b), 457, etc.)	<input type="text"/>
Employer-sponsored retirement plan account 10 (401(k), 403(b), 457, etc.)	<input type="text"/>
Pension with an account balance which you can access as a lump sum	<input type="text"/>
Pension with an account balance which you can access as a lump sum 2	<input type="text"/>
Pension with an account balance which you can access as a lump sum 3	<input type="text"/>
Pension with an account balance which you can access as a lump sum 4	<input type="text"/>
Pension with an account balance which you can access as a lump sum 5	<input type="text"/>
Pension with an account balance which you can access as a lump sum 6	<input type="text"/>
Pension with an account balance which you can access as a lump sum 7	<input type="text"/>
Pension with an account balance which you can access as a lump sum 8	<input type="text"/>
Pension with an account balance which you can access as a lump sum 9	<input type="text"/>

Pension with an account balance which you can access as a lump sum 10	<input type="text"/>
Other type of tax-deferred retirement account (such as SEPs, Keoghs, etc.)	<input type="text"/>
Other type of tax-deferred retirement account 2 (such as SEPs, Keoghs, etc.)	<input type="text"/>
Other type of tax-deferred retirement account 3 (such as SEPs, Keoghs, etc.)	<input type="text"/>
Other type of tax-deferred retirement account 4 (such as SEPs, Keoghs, etc.)	<input type="text"/>
Other type of tax-deferred retirement account 5 (such as SEPs, Keoghs, etc.)	<input type="text"/>
Other type of tax-deferred retirement account 6 (such as SEPs, Keoghs, etc.)	<input type="text"/>
Other type of tax-deferred retirement account 7 (such as SEPs, Keoghs, etc.)	<input type="text"/>
Other type of tax-deferred retirement account 8 (such as SEPs, Keoghs, etc.)	<input type="text"/>
Other type of tax-deferred retirement account 9 (such as SEPs, Keoghs, etc.)	<input type="text"/>
Other type of tax-deferred retirement account 10 (such as SEPs, Keoghs, etc.)	<input type="text"/>
Checking account	<input type="text"/>
Checking account 2	<input type="text"/>
Checking account 3	<input type="text"/>
Checking account 4	<input type="text"/>
Checking account 5	<input type="text"/>
Checking account 6	<input type="text"/>
Checking account 7	<input type="text"/>
Checking account 8	<input type="text"/>
Checking account 9	<input type="text"/>
Checking account 10	<input type="text"/>
Savings account	<input type="text"/>
Savings account 2	<input type="text"/>

Savings account 3	<input type="text"/>
Savings account 4	<input type="text"/>
Savings account 5	<input type="text"/>
Savings account 6	<input type="text"/>
Savings account 7	<input type="text"/>
Savings account 8	<input type="text"/>
Savings account 9	<input type="text"/>
Savings account 10	<input type="text"/>
Money market account	<input type="text"/>
Money market account 2	<input type="text"/>
Money market account 3	<input type="text"/>
Money market account 4	<input type="text"/>
Money market account 5	<input type="text"/>
Money market account 6	<input type="text"/>
Money market account 7	<input type="text"/>
Money market account 8	<input type="text"/>
Money market account 9	<input type="text"/>
Money market account 10	<input type="text"/>
Mutual fund account (other than money market mutual fund)	<input type="text"/>
Mutual fund account 2 (other than money market mutual fund)	<input type="text"/>
Mutual fund account 3 (other than money market mutual fund)	<input type="text"/>
Mutual fund account 4 (other than money market mutual fund)	<input type="text"/>
Mutual fund account 5 (other than money market mutual fund)	<input type="text"/>
Mutual fund account 6 (other than money market mutual fund)	<input type="text"/>
Mutual fund account 7 (other than money market mutual fund)	<input type="text"/>

Mutual fund account 8 (other than money market mutual fund)	<input type="text"/>
Mutual fund account 9 (other than money market mutual fund)	<input type="text"/>
Mutual fund account 10 (other than money market mutual fund)	<input type="text"/>
Certificate of deposit (CD) portfolio (aggregate of all CD holdings)	<input type="text"/>
Certificate of deposit (CD) portfolio 2 (aggregate of all CD holdings)	<input type="text"/>
Certificate of deposit (CD) portfolio 3 (aggregate of all CD holdings)	<input type="text"/>
Certificate of deposit (CD) portfolio 4 (aggregate of all CD holdings)	<input type="text"/>
Certificate of deposit (CD) portfolio 5 (aggregate of all CD holdings)	<input type="text"/>
Certificate of deposit (CD) portfolio 6 (aggregate of all CD holdings)	<input type="text"/>
Certificate of deposit (CD) portfolio 7 (aggregate of all CD holdings)	<input type="text"/>
Certificate of deposit (CD) portfolio 8 (aggregate of all CD holdings)	<input type="text"/>
Certificate of deposit (CD) portfolio 9 (aggregate of all CD holdings)	<input type="text"/>
Certificate of deposit (CD) portfolio 10 (aggregate of all CD holdings)	<input type="text"/>
Brokerage account (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets)	<input type="text"/>
Brokerage account 2 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets)	<input type="text"/>
Brokerage account 3 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets)	<input type="text"/>
Brokerage account 4 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets)	<input type="text"/>
Brokerage account 5 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets)	<input type="text"/>
Brokerage account 6 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets)	<input type="text"/>
Brokerage account 7 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets)	<input type="text"/>
Brokerage account 8 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets)	<input type="text"/>
Brokerage account 9 (including stocks, municipal, corporate, or	<input type="text"/>

other bonds, mutual funds, ETFs and other assets)	<input type="text"/>
Brokerage account 10 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets)	<input type="text"/>
Directly held securities or other financial assets (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment Programs.)	<input type="text"/>
Directly held securities or other financial assets 2 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment Programs.)	<input type="text"/>
Directly held securities or other financial assets 3 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment Programs.)	<input type="text"/>
Directly held securities or other financial assets 4 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment Programs.)	<input type="text"/>
Directly held securities or other financial assets 5 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment Programs.)	<input type="text"/>
Directly held securities or other financial assets 6 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment Programs.)	<input type="text"/>
Directly held securities or other financial assets 7 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment Programs.)	<input type="text"/>
Directly held securities or other financial assets 8 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment Programs.)	<input type="text"/>
Directly held securities or other financial assets 9 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment Programs.)	<input type="text"/>
Directly held securities or other financial assets 10 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment Programs.)	<input type="text"/>
Annuity accounts with a balance or cash value (<i>Exclude immediate annuities reported in the income section.</i>)	<input type="text"/>
Annuity accounts with a balance or cash value 2 (<i>Exclude immediate annuities reported in the income section.</i>)	<input type="text"/>

Annuity accounts with a balance or cash value 3 (<i>Exclude immediate annuities reported in the income section.</i>)	<input type="text"/>
Annuity accounts with a balance or cash value 4 (<i>Exclude immediate annuities reported in the income section.</i>)	<input type="text"/>
Annuity accounts with a balance or cash value 5 (<i>Exclude immediate annuities reported in the income section.</i>)	<input type="text"/>
Annuity accounts with a balance or cash value 6 (<i>Exclude immediate annuities reported in the income section.</i>)	<input type="text"/>
Annuity accounts with a balance or cash value 7 (<i>Exclude immediate annuities reported in the income section.</i>)	<input type="text"/>
Annuity accounts with a balance or cash value 8 (<i>Exclude immediate annuities reported in the income section.</i>)	<input type="text"/>
Annuity accounts with a balance or cash value 9 (<i>Exclude immediate annuities reported in the income section.</i>)	<input type="text"/>
Annuity accounts with a balance or cash value 10 (<i>Exclude immediate annuities reported in the income section.</i>)	<input type="text"/>
Life insurance with cash value (<i>Exclude term life insurance.</i>)	<input type="text"/>
Life insurance with cash value 2 (<i>Exclude term life insurance.</i>)	<input type="text"/>
Life insurance with cash value 3 (<i>Exclude term life insurance.</i>)	<input type="text"/>
Life insurance with cash value 4 (<i>Exclude term life insurance.</i>)	<input type="text"/>
Life insurance with cash value 5 (<i>Exclude term life insurance.</i>)	<input type="text"/>
Life insurance with cash value 6 (<i>Exclude term life insurance.</i>)	<input type="text"/>
Life insurance with cash value 7 (<i>Exclude term life insurance.</i>)	<input type="text"/>
Life insurance with cash value 8 (<i>Exclude term life insurance.</i>)	<input type="text"/>
Life insurance with cash value 9 (<i>Exclude term life insurance.</i>)	<input type="text"/>
Life insurance with cash value 10 (<i>Exclude term life insurance.</i>)	<input type="text"/>
Section 529 College Savings Plans or Coverdell Accounts	<input type="text"/>
Section 529 College Savings Plans or Coverdell Accounts 2	<input type="text"/>
Section 529 College Savings Plans or Coverdell Accounts 3	<input type="text"/>
Section 529 College Savings Plans or Coverdell Accounts 4	<input type="text"/>
Section 529 College Savings Plans or Coverdell Accounts 5	<input type="text"/>
Section 529 College Savings Plans or Coverdell Accounts 6	<input type="text"/>

	<input type="text"/>
Section 529 College Savings Plans or Coverdell Accounts 7	<input type="text"/>
Section 529 College Savings Plans or Coverdell Accounts 8	<input type="text"/>
Section 529 College Savings Plans or Coverdell Accounts 9	<input type="text"/>
Section 529 College Savings Plans or Coverdell Accounts 10	<input type="text"/>
Other accounts not specified above	<input type="text"/>
Other accounts not specified above 2	<input type="text"/>
Other accounts not specified above 3	<input type="text"/>
Other accounts not specified above 4	<input type="text"/>
Other accounts not specified above 5	<input type="text"/>
Other accounts not specified above 6	<input type="text"/>
Other accounts not specified above 7	<input type="text"/>
Other accounts not specified above 8	<input type="text"/>
Other accounts not specified above 9	<input type="text"/>
Other accounts not specified above 10	<input type="text"/>

VRI_Q60_TEXT

Please scroll down to see a summary of your household's investment, savings, and retirement accounts. Does this correctly reflect all of your household's investment, savings, and retirement accounts?

What's most important is that nothing significant is forgotten or double-counted in the list.

If this information is not correct, you will be able to go back to the beginning of this section to update your information.

It is very important for the rest of the survey that your responses here be as complete and accurate as possible and we appreciate you taking the time to thoroughly review and update if necessary. See VRI_Q60_TEXT in appendix

Question: RVW_ENUM_NAME		
Scale Summary		
Code	Label	Show-If
1	Yes. This is accurate and I am ready to continue.	
2	No. I need to go back to make an update.	

VRI_Q60

Is this correct?

- Yes. This is accurate and I am ready to continue.
- No. I need to go back to make an update.

Jump-To: ENUM_CONTINUE_ACCT_VAL_1

Description:

Jump-To-Item: ACCT_VAL_TABLE

Jump-If: (RVW_ENUM_NAME = 1:[Yes. This is accurate and I am ready to continue.]) or (RVW_ENUM_NAME was-not-answered)

Question: RVW_ENUM_NAME_CHG

Show if: (RVW_ENUM_NAME = 2:[No. I need to go back to make an update.]

VRI_Q60A

Please tell us which of these activities you need to do.

Select all that apply.

- I need to add or delete an account type.
- I need to increase or decrease the number of accounts.
- Please continue to next question.

Jump-To: ENUM_JUMP_TO_ACCT_TYPE

Description:

Jump-To-Item: ACCT_TYPE_REVISIT

Jump-If: (RVW_ENUM_NAME_CHG is-any-of [I need to add or delete an account type.]) and (RVW_ENUM_NAME = 2:[No. I need to go back to make an update.]

Jump-To: ENUM_JUMP_TO_ACCT_NUM

Description:

Jump-To-Item: ACCT_NUM_REVISIT

Jump-If: (RVW_ENUM_NAME_CHG is-none-of [I need to add or delete an account type.]) and (RVW_ENUM_NAME_CHG is-any-of [I need to increase or decrease the number of accounts.]) and (RVW_ENUM_NAME = 2:[No. I need to go back to make an update.]

Jump-To: ENUM_CONTINUE_ACCT_VAL

Description:

Jump-To-Item: ACCT_VAL_TABLE

Jump-If: (RVW_ENUM_NAME_CHG is-none-of [I need to add or delete an account type.]) or [I need to increase or decrease the number of accounts.]

Collection: ACCT_VAL_TABLE

Contains: ACCT_VAL

Your previous responses are shown below. Please change your responses in this table.

Question Block: ACCT_VAL

Contains: ACCT_VAL1_A_1, ACCT_VAL1_A_2, ACCT_VAL1_A_3, ACCT_VAL1_A_4, ACCT_VAL1_A_5, ACCT_VAL1_A_6, ACCT_VAL1_A_7, ACCT_VAL1_A_8, ACCT_VAL1_A_9, ACCT_VAL1_A_10, ACCT_VAL1_B_1, ACCT_VAL1_B_2, ACCT_VAL1_B_3, ACCT_VAL1_B_4, ACCT_VAL1_B_5, ACCT_VAL1_B_6, ACCT_VAL1_B_7, ACCT_VAL1_B_8, ACCT_VAL1_B_9, ACCT_VAL1_B_10, ACCT_VAL1_C_1, ACCT_VAL1_C_2, ACCT_VAL1_C_3, ACCT_VAL1_C_4, ACCT_VAL1_C_5, ACCT_VAL1_C_6, ACCT_VAL1_C_7, ACCT_VAL1_C_8, ACCT_VAL1_C_9, ACCT_VAL1_C_10, ACCT_VAL1_O_1, ACCT_VAL1_O_2, ACCT_VAL1_O_3, ACCT_VAL1_O_4, ACCT_VAL1_O_5, ACCT_VAL1_O_6, ACCT_VAL1_O_7, ACCT_VAL1_O_8, ACCT_VAL1_O_9, ACCT_VAL1_O_10, ACCT_VAL1_D_1, ACCT_VAL1_D_2, ACCT_VAL1_D_3, ACCT_VAL1_D_4, ACCT_VAL1_D_5, ACCT_VAL1_D_6, ACCT_VAL1_D_7, ACCT_VAL1_D_8, ACCT_VAL1_D_9, ACCT_VAL1_D_10, ACCT_VAL1_E_1, ACCT_VAL1_E_2, ACCT_VAL1_E_3, ACCT_VAL1_E_4, ACCT_VAL1_E_5, ACCT_VAL1_E_6, ACCT_VAL1_E_7, ACCT_VAL1_E_8, ACCT_VAL1_E_9, ACCT_VAL1_E_10, ACCT_VAL1_F_1, ACCT_VAL1_F_2, ACCT_VAL1_F_3, ACCT_VAL1_F_4, ACCT_VAL1_F_5, ACCT_VAL1_F_6, ACCT_VAL1_F_7, ACCT_VAL1_F_8, ACCT_VAL1_F_9, ACCT_VAL1_F_10, ACCT_VAL1_G_1, ACCT_VAL1_G_2, ACCT_VAL1_G_3, ACCT_VAL1_G_4, ACCT_VAL1_G_5, ACCT_VAL1_G_6, ACCT_VAL1_G_7, ACCT_VAL1_G_8, ACCT_VAL1_G_9, ACCT_VAL1_G_10, ACCT_VAL1_H_1, ACCT_VAL1_H_2, ACCT_VAL1_H_3, ACCT_VAL1_H_4, ACCT_VAL1_H_5, ACCT_VAL1_H_6, ACCT_VAL1_H_7, ACCT_VAL1_H_8, ACCT_VAL1_H_9, ACCT_VAL1_H_10, ACCT_VAL1_I_1, ACCT_VAL1_I_2, ACCT_VAL1_I_3, ACCT_VAL1_I_4, ACCT_VAL1_I_5, ACCT_VAL1_I_6, ACCT_VAL1_I_7, ACCT_VAL1_I_8, ACCT_VAL1_I_9, ACCT_VAL1_I_10, ACCT_VAL1_J_1, ACCT_VAL1_J_2, ACCT_VAL1_J_3, ACCT_VAL1_J_4, ACCT_VAL1_J_5, ACCT_VAL1_J_6, ACCT_VAL1_J_7, ACCT_VAL1_J_8, ACCT_VAL1_J_9, ACCT_VAL1_J_10, ACCT_VAL1_K_1, ACCT_VAL1_K_2, ACCT_VAL1_K_3, ACCT_VAL1_K_4, ACCT_VAL1_K_5, ACCT_VAL1_K_6, ACCT_VAL1_K_7, ACCT_VAL1_K_8, ACCT_VAL1_K_9, ACCT_VAL1_K_10, ACCT_VAL1_L_1, ACCT_VAL1_L_2, ACCT_VAL1_L_3, ACCT_VAL1_L_4, ACCT_VAL1_L_5, ACCT_VAL1_L_6, ACCT_VAL1_L_7, ACCT_VAL1_L_8, ACCT_VAL1_L_9, ACCT_VAL1_L_10, ACCT_VAL1_M_1, ACCT_VAL1_M_2, ACCT_VAL1_M_3, ACCT_VAL1_M_4, ACCT_VAL1_M_5, ACCT_VAL1_M_6, ACCT_VAL1_M_7, ACCT_VAL1_M_8, ACCT_VAL1_M_9, ACCT_VAL1_M_10, ACCT_VAL1_N_1, ACCT_VAL1_N_2, ACCT_VAL1_N_3, ACCT_VAL1_N_4, ACCT_VAL1_N_5, ACCT_VAL1_N_6, ACCT_VAL1_N_7, ACCT_VAL1_N_8, ACCT_VAL1_N_9, ACCT_VAL1_N_10

VRI_Q61

Please enter your total balance in each of account listed below.

Only the subset of account types respondent told us they hold will be shown. Nickname shows after colon. You can reference any documents or records that may help you obtain this information.

You may also give us your best estimate from memory. Please feel free to round, but try to be accurate at least to the nearest thousand dollars. For example, if the account balance was \$24,823, you may enter '25000' below.

We appreciate any effort you give to specify an amount as precisely as possible. The information you provide will be kept completely confidential.

IRA:	\$ <input type="text"/>
IRA 2:	\$ <input type="text"/>
IRA 3:	\$ <input type="text"/>
IRA 4:	\$ <input type="text"/>
IRA 5:	\$ <input type="text"/>
IRA 6:	\$ <input type="text"/>
IRA 7:	\$ <input type="text"/>
IRA 8:	\$ <input type="text"/>
IRA 9:	\$ <input type="text"/>
IRA 10:	\$ <input type="text"/>
Employer-sponsored plan:	\$ <input type="text"/>
Employer-sponsored plan 2:	\$ <input type="text"/>
Employer-sponsored plan 3:	\$ <input type="text"/>
Employer-sponsored plan 4:	\$ <input type="text"/>
Employer-sponsored plan 5:	\$ <input type="text"/>
Employer-sponsored plan 6:	\$ <input type="text"/>
Employer-sponsored plan 7:	\$ <input type="text"/>
Employer-sponsored plan 8:	\$ <input type="text"/>
Employer-sponsored plan 9:	\$ <input type="text"/>
Employer-sponsored plan 10:	\$ <input type="text"/>
Pension with an account balance which you can access as a lump sum:	\$ <input type="text"/>
Pension with an account balance which you can access as a lump sum 2:	\$ <input type="text"/>

Pension with an account balance which you can access as a lump sum 3:	\$ <input type="text"/>
Pension with an account balance which you can access as a lump sum 4:	\$ <input type="text"/>
Pension with an account balance which you can access as a lump sum 5:	\$ <input type="text"/>
Pension with an account balance which you can access as a lump sum 6:	\$ <input type="text"/>
Pension with an account balance which you can access as a lump sum 7:	\$ <input type="text"/>
Pension with an account balance which you can access as a lump sum 8:	\$ <input type="text"/>
Pension with an account balance which you can access as a lump sum 9:	\$ <input type="text"/>
Pension with an account balance which you can access as a lump sum 10:	\$ <input type="text"/>
Other type of tax-deferred retirement account (such as SEPs, Keoghs, etc.):	\$ <input type="text"/>
Other type of tax-deferred retirement account 2 (such as SEPs, Keoghs, etc.):	\$ <input type="text"/>
Other type of tax-deferred retirement account 3 (such as SEPs, Keoghs, etc.):	\$ <input type="text"/>
Other type of tax-deferred retirement account 4 (such as SEPs, Keoghs, etc.):	\$ <input type="text"/>
Other type of tax-deferred retirement account 5 (such as SEPs, Keoghs, etc.):	\$ <input type="text"/>
Other type of tax-deferred retirement account 6 (such as SEPs, Keoghs, etc.):	\$ <input type="text"/>
Other type of tax-deferred retirement account 7 (such as SEPs, Keoghs, etc.):	\$ <input type="text"/>
Other type of tax-deferred retirement account 8 (such as SEPs, Keoghs, etc.):	\$ <input type="text"/>
Other type of tax-deferred retirement account 9 (such as SEPs, Keoghs, etc.):	\$ <input type="text"/>
Other type of tax-deferred retirement account 10 (such as SEPs, Keoghs, etc.):	\$ <input type="text"/>
Checking account:	\$ <input type="text"/>
Checking account 2:	\$ <input type="text"/>
Checking account 3:	\$ <input type="text"/>
Checking account 4:	\$ <input type="text"/>
Checking account 5:	\$ <input type="text"/>

Checking account 6:	\$ <input type="text"/>
Checking account 7:	\$ <input type="text"/>
Checking account 8:	\$ <input type="text"/>
Checking account 9:	\$ <input type="text"/>
Checking account 10:	\$ <input type="text"/>
Savings account:	\$ <input type="text"/>
Savings account 2:	\$ <input type="text"/>
Savings account 3:	\$ <input type="text"/>
Savings account 4:	\$ <input type="text"/>
Savings account 5:	\$ <input type="text"/>
Savings account 6:	\$ <input type="text"/>
Savings account 7:	\$ <input type="text"/>
Savings account 8:	\$ <input type="text"/>
Savings account 9:	\$ <input type="text"/>
Savings account 10:	\$ <input type="text"/>
Money market account:	\$ <input type="text"/>
Money market account 2:	\$ <input type="text"/>
Money market account 3:	\$ <input type="text"/>
Money market account 4:	\$ <input type="text"/>
Money market account 5:	\$ <input type="text"/>
Money market account 6:	\$ <input type="text"/>
Money market account 7:	\$ <input type="text"/>
Money market account 8:	\$ <input type="text"/>
Money market account 9:	\$ <input type="text"/>
Money market account 10:	\$ <input type="text"/>

Mutual fund account (other than money market mutual fund):	\$ <input type="text"/>
Mutual fund account 2 (other than money market mutual fund):	\$ <input type="text"/>
Mutual fund account 3 (other than money market mutual fund):	\$ <input type="text"/>
Mutual fund account 4 (other than money market mutual fund):	\$ <input type="text"/>
Mutual fund account 5 (other than money market mutual fund):	\$ <input type="text"/>
Mutual fund account 6 (other than money market mutual fund):	\$ <input type="text"/>
Mutual fund account 7 (other than money market mutual fund):	\$ <input type="text"/>
Mutual fund account 8 (other than money market mutual fund):	\$ <input type="text"/>
Mutual fund account 9 (other than money market mutual fund):	\$ <input type="text"/>
Mutual fund account 10 (other than money market mutual fund):	\$ <input type="text"/>
Certificate of deposit (CD) portfolio (aggregate of all CD holdings):	\$ <input type="text"/>
Certificate of deposit (CD) portfolio 2 (aggregate of all CD holdings):	\$ <input type="text"/>
Certificate of deposit (CD) portfolio 3 (aggregate of all CD holdings):	\$ <input type="text"/>
Certificate of deposit (CD) portfolio 4 (aggregate of all CD holdings):	\$ <input type="text"/>
Certificate of deposit (CD) portfolio 5 (aggregate of all CD holdings):	\$ <input type="text"/>
Certificate of deposit (CD) portfolio 6 (aggregate of all CD holdings):	\$ <input type="text"/>
Certificate of deposit (CD) portfolio 7 (aggregate of all CD holdings):	\$ <input type="text"/>
Certificate of deposit (CD) portfolio 8 (aggregate of all CD holdings):	\$ <input type="text"/>
Certificate of deposit (CD) portfolio 9 (aggregate of all CD holdings):	\$ <input type="text"/>
Certificate of deposit (CD) portfolio 10 (aggregate of all CD holdings):	\$ <input type="text"/>
Brokerage account (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets):	\$ <input type="text"/>
Brokerage account 2 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets):	\$ <input type="text"/>
Brokerage account 3 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets):	\$ <input type="text"/>
Brokerage account 4 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets):	\$ <input type="text"/>

Brokerage account 5 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets):	\$ <input type="text"/>
Brokerage account 6 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets):	\$ <input type="text"/>
Brokerage account 7 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets):	\$ <input type="text"/>
Brokerage account 8 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets):	\$ <input type="text"/>
Brokerage account 9 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets):	\$ <input type="text"/>
Brokerage account 10 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets):	\$ <input type="text"/>
Directly held securities or other financial assets (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.):	\$ <input type="text"/>
Directly held securities or other financial assets 2 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.):	\$ <input type="text"/>
Directly held securities or other financial assets 3 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.):	\$ <input type="text"/>
Directly held securities or other financial assets 4 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.):	\$ <input type="text"/>
Directly held securities or other financial assets 5 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.):	\$ <input type="text"/>
Directly held securities or other financial assets 6 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.):	\$ <input type="text"/>
Directly held securities or other financial assets 7 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.):	\$ <input type="text"/>
Directly held securities or other financial assets 8 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.):	\$ <input type="text"/>
Directly held securities or other financial assets 9 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.):	\$ <input type="text"/>
Directly held securities or other financial assets 10 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.):	\$ <input type="text"/>
Annuity accounts with a balance or cash value (<i>Exclude immediate annuities reported in the income section.</i>):	\$ <input type="text"/>
Annuity accounts with a balance or cash value 2 (Exclude immediate	

annuities reported in the income section.):	\$ <input type="text"/>
Annuity accounts with a balance or cash value 3 (<i>Exclude immediate annuities reported in the income section.</i>):	\$ <input type="text"/>
Annuity accounts with a balance or cash value 4 (<i>Exclude immediate annuities reported in the income section.</i>)	\$ <input type="text"/>
Annuity accounts with a balance or cash value 5 (<i>Exclude immediate annuities reported in the income section.</i>):	\$ <input type="text"/>
Annuity accounts with a balance or cash value 6 (<i>Exclude immediate annuities reported in the income section.</i>):	\$ <input type="text"/>
Annuity accounts with a balance or cash value 7 (<i>Exclude immediate annuities reported in the income section.</i>)	\$ <input type="text"/>
Annuity accounts with a balance or cash value 8 (<i>Exclude immediate annuities reported in the income section.</i>)	\$ <input type="text"/>
Annuity accounts with a balance or cash value 9 (<i>Exclude immediate annuities reported in the income section.</i>):	\$ <input type="text"/>
Annuity accounts with a balance or cash value 10 (<i>Exclude immediate annuities reported in the income section.</i>):	\$ <input type="text"/>
Life insurance with cash value (<i>Exclude term life insurance.</i>):	\$ <input type="text"/>
Life insurance with cash value 2 (<i>Exclude term life insurance.</i>)	\$ <input type="text"/>
Life insurance with cash value 3 (<i>Exclude term life insurance.</i>)	\$ <input type="text"/>
Life insurance with cash value 4 (<i>Exclude term life insurance.</i>):	\$ <input type="text"/>
Life insurance with cash value 5 (<i>Exclude term life insurance.</i>):	\$ <input type="text"/>
Life insurance with cash value 6 (<i>Exclude term life insurance.</i>):	\$ <input type="text"/>
Life insurance with cash value 7 (<i>Exclude term life insurance.</i>):	\$ <input type="text"/>
Life insurance with cash value 8 (<i>Exclude term life insurance.</i>):	\$ <input type="text"/>
Life insurance with cash value 9 (<i>Exclude term life insurance.</i>):	\$ <input type="text"/>
Life insurance with cash value 10 (<i>Exclude term life insurance.</i>):	\$ <input type="text"/>
Section 529 College Savings Plans or Coverdell Accounts:	\$ <input type="text"/>
Section 529 College Savings Plans or Coverdell Accounts 2:	\$ <input type="text"/>
Section 529 College Savings Plans or Coverdell Accounts 3:	\$ <input type="text"/>
Section 529 College Savings Plans or Coverdell Accounts 4:	\$ <input type="text"/>
Section 529 College Savings Plans or Coverdell Accounts 5:	

	\$ <input type="text"/>
Section 529 College Savings Plans or Coverdell Accounts 6:	\$ <input type="text"/>
Section 529 College Savings Plans or Coverdell Accounts 7:	\$ <input type="text"/>
Section 529 College Savings Plans or Coverdell Accounts 8:	\$ <input type="text"/>
Section 529 College Savings Plans or Coverdell Accounts 9:	\$ <input type="text"/>
Section 529 College Savings Plans or Coverdell Accounts 10:	\$ <input type="text"/>
Other accounts not specified above:	\$ <input type="text"/>
Other accounts not specified above 2:	\$ <input type="text"/>
Other accounts not specified above 3:	\$ <input type="text"/>
Other accounts not specified above 4:	\$ <input type="text"/>
Other accounts not specified above 5:	\$ <input type="text"/>
Other accounts not specified above 6:	\$ <input type="text"/>
Other accounts not specified above 7:	\$ <input type="text"/>
Other accounts not specified above 8:	\$ <input type="text"/>
Other accounts not specified above 9:	\$ <input type="text"/>
Other accounts not specified above 10:	\$ <input type="text"/>

Please refer to the below table and verify the balances you reported for each of your accounts. See [appendix for example of summary table RVW_VALUES](#)

Question: RVW_ALL_CHECKS		
Scale Summary		
Code	Label	Show-If
1	Yes. This is accurate and I am ready to continue.	
2	No. I need to go back to make an update.	

VRI_Q62A

Is this correct?

- Yes. This is accurate and I am ready to continue.
- No. I need to go back to make an update.

<p>Jump-To: JMP_ALL_RECORDS_TABLE</p> <p>Description:</p> <p>Jump-To-Item: RVW_ALL_RECORD_TABLE</p> <p>Jump-If: (RVW_ALL_CHECKS = 1:[Yes. This is accurate and I am ready to continue.]) or (RVW_ALL_CHECKS was-not-answered)</p>

<p>Question: RVW_ALL_CHG</p> <p>Show if: (RVW_ALL_CHECKS = 2:[No. I need to go back to make an update.])</p>
--

VRI_Q62B

Please tell us which of these activities you need to do.

- I need to add and/or delete an account
- I need to fix the dollar amount of what I have already provided.
- Please continue to the next question.

Jump-To: ENUM_JUMP_TO_ACCT_TYPE_2
Description:
Jump-To-Item: ACCT_TYPE_REVISIT
Jump-If: (RVW_ALL_CHG is-any-of [I need to add and/or delete an account]) and (RVW_ALL_CHECKS = 2:[No. I need to go back to make an update.])

Jump-To: ENUM_JUMP_TO_ACCT_VAL1
Description:
Jump-To-Item: ACCT_VAL_TABLE
Jump-If: (RVW_ALL_CHG is-none-of [I need to add and/or delete an account]) and (RVW_ALL_CHG is-any-of [I need to fix the dollar amount of what I have already provided.]) and (RVW_ALL_CHECKS = 2:[No. I need to go back to make an update.])

Jump-To: ENUM_CONTINUE_ACCT_RECORDS
Description:
Jump-To-Item: RVW_ALL_RECORD_TABLE
Jump-If: (RVW_ALL_CHG is-none-of [I need to add and/or delete an account] or [I need to fix the dollar amount of what I have already provided.])

Collection: RVW_ALL_RECORD_TABLE
Contains: ACCT_REC

Your previous responses are shown below. Please change your responses in this table.

Question Block: ACCT_REC
Contains: ACCT_REC_A_1, ACCT_REC_A_2, ACCT_REC_A_3, ACCT_REC_A_4, ACCT_REC_A_5, ACCT_REC_A_6, ACCT_REC_A_7, ACCT_REC_A_8, ACCT_REC_A_9, ACCT_REC_A_10, ACCT_REC_B_1, ACCT_REC_B_2, ACCT_REC_B_3, ACCT_REC_B_4, ACCT_REC_B_5, ACCT_REC_B_6, ACCT_REC_B_7, ACCT_REC_B_8, ACCT_REC_B_9, ACCT_REC_B_10, ACCT_REC_C_1, ACCT_REC_C_2, ACCT_REC_C_3, ACCT_REC_C_4, ACCT_REC_C_5, ACCT_REC_C_6, ACCT_REC_C_7, ACCT_REC_C_8, ACCT_REC_C_9, ACCT_REC_C_10, ACCT_REC_O_1, ACCT_REC_O_2, ACCT_REC_O_3, ACCT_REC_O_4, ACCT_REC_O_5, ACCT_REC_O_6, ACCT_REC_O_7, ACCT_REC_O_8, ACCT_REC_O_9, ACCT_REC_O_10, ACCT_REC_D_1, ACCT_REC_D_2, ACCT_REC_D_3, ACCT_REC_D_4, ACCT_REC_D_5, ACCT_REC_D_6, ACCT_REC_D_7, ACCT_REC_D_8, ACCT_REC_D_9, ACCT_REC_D_10, ACCT_REC_E_1, ACCT_REC_E_2, ACCT_REC_E_3, ACCT_REC_E_4, ACCT_REC_E_5, ACCT_REC_E_6, ACCT_REC_E_7, ACCT_REC_E_8, ACCT_REC_E_9, ACCT_REC_E_10, ACCT_REC_F_1, ACCT_REC_F_2, ACCT_REC_F_3, ACCT_REC_F_4, ACCT_REC_F_5, ACCT_REC_F_6, ACCT_REC_F_7, ACCT_REC_F_8, ACCT_REC_F_9, ACCT_REC_F_10, ACCT_REC_G_1, ACCT_REC_G_2, ACCT_REC_G_3, ACCT_REC_G_4, ACCT_REC_G_5, ACCT_REC_G_6, ACCT_REC_G_7, ACCT_REC_G_8, ACCT_REC_G_9, ACCT_REC_G_10, ACCT_REC_H_1, ACCT_REC_H_2, ACCT_REC_H_3, ACCT_REC_H_4, ACCT_REC_H_5, ACCT_REC_H_6, ACCT_REC_H_7, ACCT_REC_H_8, ACCT_REC_H_9, ACCT_REC_H_10, ACCT_REC_I_1, ACCT_REC_I_2, ACCT_REC_I_3, ACCT_REC_I_4, ACCT_REC_I_5, ACCT_REC_I_6, ACCT_REC_I_7, ACCT_REC_I_8, ACCT_REC_I_9, ACCT_REC_I_10, ACCT_REC_J_1, ACCT_REC_J_2, ACCT_REC_J_3, ACCT_REC_J_4, ACCT_REC_J_5, ACCT_REC_J_6, ACCT_REC_J_7, ACCT_REC_J_8, ACCT_REC_J_9, ACCT_REC_J_10, ACCT_REC_K_1, ACCT_REC_K_2, ACCT_REC_K_3, ACCT_REC_K_4, ACCT_REC_K_5, ACCT_REC_K_6, ACCT_REC_K_7, ACCT_REC_K_8, ACCT_REC_K_9, ACCT_REC_K_10, ACCT_REC_L_1, ACCT_REC_L_2, ACCT_REC_L_3, ACCT_REC_L_4, ACCT_REC_L_5, ACCT_REC_L_6, ACCT_REC_L_7, ACCT_REC_L_8, ACCT_REC_L_9, ACCT_REC_L_10, ACCT_REC_M_1, ACCT_REC_M_2, ACCT_REC_M_3, ACCT_REC_M_4, ACCT_REC_M_5, ACCT_REC_M_6, ACCT_REC_M_7, ACCT_REC_M_8, ACCT_REC_M_9, ACCT_REC_M_10, ACCT_REC_N_1, ACCT_REC_N_2, ACCT_REC_N_3, ACCT_REC_N_4, ACCT_REC_N_5, ACCT_REC_N_6, ACCT_REC_N_7, ACCT_REC_N_8, ACCT_REC_N_9, ACCT_REC_N_10

Scale Summary		
Code	Label	Show-If
1	YES	
0	NO	

VRI_Q62

Please indicate whether you referred to records or statements in supplying the values for each of the following accounts.

Accounts Nickname shows after first colon, reported value after 2nd colon.

Accounts	YES	NO
IRA: :	<input type="radio"/>	<input type="radio"/>
IRA 2: :	<input type="radio"/>	<input type="radio"/>
IRA 3: :	<input type="radio"/>	<input type="radio"/>
IRA 4: :	<input type="radio"/>	<input type="radio"/>

IRA 5: :	<input type="radio"/>	<input type="radio"/>
IRA 6: :	<input type="radio"/>	<input type="radio"/>
IRA 7: :	<input type="radio"/>	<input type="radio"/>
IRA 8: :	<input type="radio"/>	<input type="radio"/>
IRA 9: :	<input type="radio"/>	<input type="radio"/>
IRA 10: :	<input type="radio"/>	<input type="radio"/>
Employer-sponsored plan: :	<input type="radio"/>	<input type="radio"/>
Employer-sponsored plan 2: :	<input type="radio"/>	<input type="radio"/>
Employer-sponsored plan 3: :	<input type="radio"/>	<input type="radio"/>
Employer-sponsored plan 4: :	<input type="radio"/>	<input type="radio"/>
Employer-sponsored plan 5: :	<input type="radio"/>	<input type="radio"/>
Employer-sponsored plan 6: :	<input type="radio"/>	<input type="radio"/>
Employer-sponsored plan 7: :	<input type="radio"/>	<input type="radio"/>
Employer-sponsored plan 8: :	<input type="radio"/>	<input type="radio"/>
Employer-sponsored plan 9: :	<input type="radio"/>	<input type="radio"/>
Employer-sponsored plan 10: :	<input type="radio"/>	<input type="radio"/>
Pension with an account balance which you can access as a lump sum: :	<input type="radio"/>	<input type="radio"/>
Pension with an account balance which you can access as a lump sum 2: :	<input type="radio"/>	<input type="radio"/>
Pension with an account balance which you can access as a lump sum 3: :	<input type="radio"/>	<input type="radio"/>
Pension with an account balance which you can access as a lump sum 4: :	<input type="radio"/>	<input type="radio"/>
Pension with an account balance which you can access as a lump sum 5: :	<input type="radio"/>	<input type="radio"/>
Pension with an account balance which you can access as a lump sum 6: :	<input type="radio"/>	<input type="radio"/>
Pension with an account balance which you can access as a lump sum 7: :	<input type="radio"/>	<input type="radio"/>
Pension with an account balance which you can access as a lump sum 8: :	<input type="radio"/>	<input type="radio"/>
Pension with an account balance which you can access as a lump sum 9: : :	<input type="radio"/>	<input type="radio"/>
Pension with an account balance which you can access as a lump sum 10: :	<input type="radio"/>	<input type="radio"/>
Other type of tax-deferred retirement account (such as SEPs, Keoghs, etc.): :	<input type="radio"/>	<input type="radio"/>
Other type of tax-deferred retirement account 2 (such as SEPs, Keoghs, etc.): :	<input type="radio"/>	<input type="radio"/>

Other type of tax-deferred retirement account 3 (such as SEPs, Keoghs, etc.): :	<input type="radio"/>	<input type="radio"/>
Other type of tax-deferred retirement account 4 (such as SEPs, Keoghs, etc.): ;:	<input type="radio"/>	<input type="radio"/>
Other type of tax-deferred retirement account 5 (such as SEPs, Keoghs, etc.): :	<input type="radio"/>	<input type="radio"/>
Other type of tax-deferred retirement account 6 (such as SEPs, Keoghs, etc.): :	<input type="radio"/>	<input type="radio"/>
Other type of tax-deferred retirement account 7 (such as SEPs, Keoghs, etc.): :	<input type="radio"/>	<input type="radio"/>
Other type of tax-deferred retirement account 8 (such as SEPs, Keoghs, etc.): :	<input type="radio"/>	<input type="radio"/>
Other type of tax-deferred retirement account 9 (such as SEPs, Keoghs, etc.): :	<input type="radio"/>	<input type="radio"/>
Other type of tax-deferred retirement account 10 (such as SEPs, Keoghs, etc.): :	<input type="radio"/>	<input type="radio"/>
Checking account: :	<input type="radio"/>	<input type="radio"/>
Checking account 2: :	<input type="radio"/>	<input type="radio"/>
Checking account 3: :	<input type="radio"/>	<input type="radio"/>
Checking account 4: :	<input type="radio"/>	<input type="radio"/>
Checking account 5: :	<input type="radio"/>	<input type="radio"/>
Checking account 6: :	<input type="radio"/>	<input type="radio"/>
Checking account 7: :	<input type="radio"/>	<input type="radio"/>
Checking account 8: :	<input type="radio"/>	<input type="radio"/>
Checking account 9: :	<input type="radio"/>	<input type="radio"/>
Checking account 10: :	<input type="radio"/>	<input type="radio"/>
Savings account: :	<input type="radio"/>	<input type="radio"/>
Savings account 2: :	<input type="radio"/>	<input type="radio"/>
Savings account 3: :	<input type="radio"/>	<input type="radio"/>
Savings account 4: :	<input type="radio"/>	<input type="radio"/>
Savings account 5: :	<input type="radio"/>	<input type="radio"/>
Savings account 6: :	<input type="radio"/>	<input type="radio"/>
Savings account 7: :	<input type="radio"/>	<input type="radio"/>
Savings account 8: :	<input type="radio"/>	<input type="radio"/>
Savings account 9: :	<input type="radio"/>	<input type="radio"/>
Savings account 10: :	<input type="radio"/>	<input type="radio"/>

Money market account: :	<input type="radio"/>	<input type="radio"/>
Money market account 2: :	<input type="radio"/>	<input type="radio"/>
Money market account 3: :	<input type="radio"/>	<input type="radio"/>
Money market account 4: :	<input type="radio"/>	<input type="radio"/>
Money market account 5: :	<input type="radio"/>	<input type="radio"/>
Money market account 6: :	<input type="radio"/>	<input type="radio"/>
Money market account 7: :	<input type="radio"/>	<input type="radio"/>
Money market account 8: :	<input type="radio"/>	<input type="radio"/>
Money market account 9: :	<input type="radio"/>	<input type="radio"/>
Money market account 10: : :	<input type="radio"/>	<input type="radio"/>
Mutual fund account (other than money market mutual fund): :	<input type="radio"/>	<input type="radio"/>
Mutual fund account 2 (other than money market mutual fund): :	<input type="radio"/>	<input type="radio"/>
Mutual fund account 3 (other than money market mutual fund): :	<input type="radio"/>	<input type="radio"/>
Mutual fund account 4 (other than money market mutual fund): :	<input type="radio"/>	<input type="radio"/>
Mutual fund account 5 (other than money market mutual fund): :	<input type="radio"/>	<input type="radio"/>
Mutual fund account 6 (other than money market mutual fund): :	<input type="radio"/>	<input type="radio"/>
Mutual fund account 7 (other than money market mutual fund): :	<input type="radio"/>	<input type="radio"/>
Mutual fund account 8 (other than money market mutual fund): :	<input type="radio"/>	<input type="radio"/>
Mutual fund account 9 (other than money market mutual fund): :	<input type="radio"/>	<input type="radio"/>
Mutual fund account 10 (other than money market mutual fund): :	<input type="radio"/>	<input type="radio"/>
Certificate of deposit (CD) portfolio (aggregate of all CD holdings): :	<input type="radio"/>	<input type="radio"/>
Certificate of deposit (CD) portfolio 2 (aggregate of all CD holdings): :	<input type="radio"/>	<input type="radio"/>
Certificate of deposit (CD) portfolio 3 (aggregate of all CD holdings): :	<input type="radio"/>	<input type="radio"/>
Certificate of deposit (CD) portfolio 4 (aggregate of all CD holdings): :	<input type="radio"/>	<input type="radio"/>
Certificate of deposit (CD) portfolio 5 (aggregate of all CD holdings): :	<input type="radio"/>	<input type="radio"/>
Certificate of deposit (CD) portfolio 6 (aggregate of all CD holdings): :	<input type="radio"/>	<input type="radio"/>
Certificate of deposit (CD) portfolio 7 (aggregate of all CD holdings): :	<input type="radio"/>	<input type="radio"/>
Certificate of deposit (CD) portfolio 8 (aggregate of all CD holdings): :	<input type="radio"/>	<input type="radio"/>

Certificate of deposit (CD) portfolio 9 (aggregate of all CD holdings): :	<input type="radio"/>	<input type="radio"/>
Certificate of deposit (CD) portfolio 10 (aggregate of all CD holdings): :	<input type="radio"/>	<input type="radio"/>
Brokerage account (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets): :	<input type="radio"/>	<input type="radio"/>
Brokerage account 2 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets): :	<input type="radio"/>	<input type="radio"/>
Brokerage account 3 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets): :	<input type="radio"/>	<input type="radio"/>
Brokerage account 4 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets): :	<input type="radio"/>	<input type="radio"/>
Brokerage account 5 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets): :	<input type="radio"/>	<input type="radio"/>
Brokerage account 6 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets): :	<input type="radio"/>	<input type="radio"/>
Brokerage account 7 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets): :	<input type="radio"/>	<input type="radio"/>
Brokerage account 8 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets): :	<input type="radio"/>	<input type="radio"/>
Brokerage account 9 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets): :	<input type="radio"/>	<input type="radio"/>
Brokerage account 10 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets): :	<input type="radio"/>	<input type="radio"/>
Directly held securities or other financial assets (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.): :	<input type="radio"/>	<input type="radio"/>
Directly held securities or other financial assets 2 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.): :	<input type="radio"/>	<input type="radio"/>
Directly held securities or other financial assets 3 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.): :	<input type="radio"/>	<input type="radio"/>
Directly held securities or other financial assets 4 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.): :	<input type="radio"/>	<input type="radio"/>
Directly held securities or other financial assets 5 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.): :	<input type="radio"/>	<input type="radio"/>
Directly held securities or other financial assets 6 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.): :	<input type="radio"/>	<input type="radio"/>
Directly held securities or other financial assets 7 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.): :	<input type="radio"/>	<input type="radio"/>

Directly held securities or other financial assets 8 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.): :	<input type="radio"/>	<input type="radio"/>
Directly held securities or other financial assets 9 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.): :	<input type="radio"/>	<input type="radio"/>
Directly held securities or other financial assets 10 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.): :	<input type="radio"/>	<input type="radio"/>
Annuity accounts with a balance or cash value (<i>Exclude immediate annuities reported in the income section.</i>): :	<input type="radio"/>	<input type="radio"/>
Annuity accounts with a balance or cash value 2 (<i>Exclude immediate annuities reported in the income section.</i>): :	<input type="radio"/>	<input type="radio"/>
Annuity accounts with a balance or cash value 3 (<i>Exclude immediate annuities reported in the income section.</i>): :	<input type="radio"/>	<input type="radio"/>
Annuity accounts with a balance or cash value 4 (<i>Exclude immediate annuities reported in the income section.</i>): :	<input type="radio"/>	<input type="radio"/>
Annuity accounts with a balance or cash value 5 (<i>Exclude immediate annuities reported in the income section.</i>): :	<input type="radio"/>	<input type="radio"/>
Annuity accounts with a balance or cash value 6 (<i>Exclude immediate annuities reported in the income section.</i>): :	<input type="radio"/>	<input type="radio"/>
Annuity accounts with a balance or cash value 7 (<i>Exclude immediate annuities reported in the income section.</i>): :	<input type="radio"/>	<input type="radio"/>
Annuity accounts with a balance or cash value 8 (<i>Exclude immediate annuities reported in the income section.</i>): :	<input type="radio"/>	<input type="radio"/>
Annuity accounts with a balance or cash value 9 (<i>Exclude immediate annuities reported in the income section.</i>): :	<input type="radio"/>	<input type="radio"/>
Annuity accounts with a balance or cash value 10 (<i>Exclude immediate annuities reported in the income section.</i>): :	<input type="radio"/>	<input type="radio"/>
Life insurance with cash value (<i>Exclude term life insurance.</i>): :	<input type="radio"/>	<input type="radio"/>
Life insurance with cash value 2 (<i>Exclude term life insurance.</i>): :	<input type="radio"/>	<input type="radio"/>
Life insurance with cash value 3 (<i>Exclude term life insurance.</i>): :	<input type="radio"/>	<input type="radio"/>
Life insurance with cash value 4 (<i>Exclude term life insurance.</i>): :	<input type="radio"/>	<input type="radio"/>
Life insurance with cash value 5 (<i>Exclude term life insurance.</i>): :	<input type="radio"/>	<input type="radio"/>
Life insurance with cash value 6 (<i>Exclude term life insurance.</i>): :	<input type="radio"/>	<input type="radio"/>
Life insurance with cash value 7 (<i>Exclude term life insurance.</i>): :	<input type="radio"/>	<input type="radio"/>
Life insurance with cash value 8 (<i>Exclude term life insurance.</i>): :	<input type="radio"/>	<input type="radio"/>
Life insurance with cash value 9 (<i>Exclude term life insurance.</i>): :	<input type="radio"/>	<input type="radio"/>

Life insurance with cash value 10 (<i>Exclude term life insurance.</i>): :	<input type="radio"/>	<input type="radio"/>
Section 529 College Savings Plans or Coverdell Accounts: :	<input type="radio"/>	<input type="radio"/>
Section 529 College Savings Plans or Coverdell Accounts 2: :	<input type="radio"/>	<input type="radio"/>
Section 529 College Savings Plans or Coverdell Accounts 3: :	<input type="radio"/>	<input type="radio"/>
Section 529 College Savings Plans or Coverdell Accounts 4: :	<input type="radio"/>	<input type="radio"/>
Section 529 College Savings Plans or Coverdell Accounts 5: :	<input type="radio"/>	<input type="radio"/>
Section 529 College Savings Plans or Coverdell Accounts 6: :	<input type="radio"/>	<input type="radio"/>
Section 529 College Savings Plans or Coverdell Accounts 7: :	<input type="radio"/>	<input type="radio"/>
Section 529 College Savings Plans or Coverdell Accounts 8: :	<input type="radio"/>	<input type="radio"/>
Section 529 College Savings Plans or Coverdell Accounts 9: :	<input type="radio"/>	<input type="radio"/>
Section 529 College Savings Plans or Coverdell Accounts 10: :	<input type="radio"/>	<input type="radio"/>
Other accounts not specified above: :	<input type="radio"/>	<input type="radio"/>
Other accounts not specified above 2: :	<input type="radio"/>	<input type="radio"/>
Other accounts not specified above 3: :	<input type="radio"/>	<input type="radio"/>
Other accounts not specified above 4: :	<input type="radio"/>	<input type="radio"/>
Other accounts not specified above 5: :	<input type="radio"/>	<input type="radio"/>
Other accounts not specified above 6: :	<input type="radio"/>	<input type="radio"/>
Other accounts not specified above 7: :	<input type="radio"/>	<input type="radio"/>
Other accounts not specified above 8: :	<input type="radio"/>	<input type="radio"/>
Other accounts not specified above 9: :	<input type="radio"/>	<input type="radio"/>
Other accounts not specified above 10: :	<input type="radio"/>	<input type="radio"/>

Collection: PCT_STOCK_TABLE
Contains: PCT_STOCK_OVERALL

Your previous responses are shown below. Please change your responses in this table.

VRI_Q63

Thinking about all of the investment, savings, and retirement accounts that your household currently has, what percentage, if any, of each account is held in stocks or stock market investments? In other words, what percentage of the underlying assets or funds in each account is held in stock investments?

[see VRI_Q63 Stock % table example in appendix](#)

Question: PCT_STOCK_OVERALL
Show if: (PCT_STOCK_ALL_SHOW = 1)

VRI_Q63A

In order to help summarize the asset allocation of your financial accounts, financial

services companies often provide you with statements or web pages that report the fraction of your investment accounts held in stocks. We understand that you may be unable to provide stock allocation information for each and every one of your accounts.

Can you instead provide a rough estimate of the overall fraction of all the financial accounts that you have told us about (including all tax-deferred retirement accounts, checking/savings/investment accounts not in a tax-deferred retirement plan or account, insurance- and education-related accounts, and other accounts) that you believe is held in stocks or stock mutual funds?

We would like the most accurate number possible, but if you feel you cannot provide an accurate number, please provide your best estimate. Please provide a number between 0 and 100 percent.

 %

Collection: ACCESS_ELEC_TABLE
 Contains: ACCT_ELEC

Your previous responses are shown below. Please change your responses in this table.

Question Block: ACCT_ELEC
Contains: ACCT_ELEC_A_1, ACCT_ELEC_A_2, ACCT_ELEC_A_3, ACCT_ELEC_A_4, ACCT_ELEC_A_5, ACCT_ELEC_A_6, ACCT_ELEC_A_7, ACCT_ELEC_A_8, ACCT_ELEC_A_9, ACCT_ELEC_A_10, ACCT_ELEC_B_1, ACCT_ELEC_B_2, ACCT_ELEC_B_3, ACCT_ELEC_B_4, ACCT_ELEC_B_5, ACCT_ELEC_B_6, ACCT_ELEC_B_7, ACCT_ELEC_B_8, ACCT_ELEC_B_9, ACCT_ELEC_B_10, ACCT_ELEC_C_1, ACCT_ELEC_C_2, ACCT_ELEC_C_3, ACCT_ELEC_C_4, ACCT_ELEC_C_5, ACCT_ELEC_C_6, ACCT_ELEC_C_7, ACCT_ELEC_C_8, ACCT_ELEC_C_9, ACCT_ELEC_C_10, ACCT_ELEC_O_1, ACCT_ELEC_O_2, ACCT_ELEC_O_3, ACCT_ELEC_O_4, ACCT_ELEC_O_5, ACCT_ELEC_O_6, ACCT_ELEC_O_7, ACCT_ELEC_O_8, ACCT_ELEC_O_9, ACCT_ELEC_O_10, ACCT_ELEC_D_1, ACCT_ELEC_D_2, ACCT_ELEC_D_3, ACCT_ELEC_D_4, ACCT_ELEC_D_5, ACCT_ELEC_D_6, ACCT_ELEC_D_7, ACCT_ELEC_D_8, ACCT_ELEC_D_9, ACCT_ELEC_D_10, ACCT_ELEC_E_1, ACCT_ELEC_E_2, ACCT_ELEC_E_3, ACCT_ELEC_E_4, ACCT_ELEC_E_5, ACCT_ELEC_E_6, ACCT_ELEC_E_7, ACCT_ELEC_E_8, ACCT_ELEC_E_9, ACCT_ELEC_E_10, ACCT_ELEC_F_1, ACCT_ELEC_F_2, ACCT_ELEC_F_3, ACCT_ELEC_F_4, ACCT_ELEC_F_5, ACCT_ELEC_F_6, ACCT_ELEC_F_7, ACCT_ELEC_F_8, ACCT_ELEC_F_9, ACCT_ELEC_F_10, ACCT_ELEC_G_1, ACCT_ELEC_G_2, ACCT_ELEC_G_3, ACCT_ELEC_G_4, ACCT_ELEC_G_5, ACCT_ELEC_G_6, ACCT_ELEC_G_7, ACCT_ELEC_G_8, ACCT_ELEC_G_9, ACCT_ELEC_G_10, ACCT_ELEC_H_1, ACCT_ELEC_H_2, ACCT_ELEC_H_3, ACCT_ELEC_H_4, ACCT_ELEC_H_5, ACCT_ELEC_H_6, ACCT_ELEC_H_7, ACCT_ELEC_H_8, ACCT_ELEC_H_9, ACCT_ELEC_H_10, ACCT_ELEC_I_1, ACCT_ELEC_I_2, ACCT_ELEC_I_3, ACCT_ELEC_I_4, ACCT_ELEC_I_5, ACCT_ELEC_I_6, ACCT_ELEC_I_7, ACCT_ELEC_I_8, ACCT_ELEC_I_9, ACCT_ELEC_I_10, ACCT_ELEC_J_1, ACCT_ELEC_J_2, ACCT_ELEC_J_3, ACCT_ELEC_J_4, ACCT_ELEC_J_5, ACCT_ELEC_J_6, ACCT_ELEC_J_7, ACCT_ELEC_J_8, ACCT_ELEC_J_9, ACCT_ELEC_J_10, ACCT_ELEC_K_1, ACCT_ELEC_K_2, ACCT_ELEC_K_3, ACCT_ELEC_K_4, ACCT_ELEC_K_5, ACCT_ELEC_K_6, ACCT_ELEC_K_7, ACCT_ELEC_K_8, ACCT_ELEC_K_9, ACCT_ELEC_K_10, ACCT_ELEC_L_1, ACCT_ELEC_L_2, ACCT_ELEC_L_3, ACCT_ELEC_L_4, ACCT_ELEC_L_5, ACCT_ELEC_L_6, ACCT_ELEC_L_7, ACCT_ELEC_L_8, ACCT_ELEC_L_9, ACCT_ELEC_L_10, ACCT_ELEC_M_1, ACCT_ELEC_M_2, ACCT_ELEC_M_3, ACCT_ELEC_M_4, ACCT_ELEC_M_5, ACCT_ELEC_M_6, ACCT_ELEC_M_7, ACCT_ELEC_M_8, ACCT_ELEC_M_9, ACCT_ELEC_M_10, ACCT_ELEC_N_1, ACCT_ELEC_N_2, ACCT_ELEC_N_3, ACCT_ELEC_N_4, ACCT_ELEC_N_5, ACCT_ELEC_N_6, ACCT_ELEC_N_7, ACCT_ELEC_N_8, ACCT_ELEC_N_9, ACCT_ELEC_N_10

Scale Summary		
Code	Label	Show-If
1	YES	
2	NO	

VRI_Q64

Do you manage or view your accounts electronically?

Please select one for each row.

Nickname shows after colon. Again, only shows accounts R reported having.

	YES	NO
IRA:	<input type="radio"/>	<input type="radio"/>
IRA 2	<input type="radio"/>	<input type="radio"/>
IRA 3:	<input type="radio"/>	<input type="radio"/>
IRA 4:	<input type="radio"/>	<input type="radio"/>
IRA 5:	<input type="radio"/>	<input type="radio"/>

IRA 6:	<input type="radio"/>	<input type="radio"/>
IRA 7:	<input type="radio"/>	<input type="radio"/>
IRA 8:	<input type="radio"/>	<input type="radio"/>
IRA 9:	<input type="radio"/>	<input type="radio"/>
IRA 10:	<input type="radio"/>	<input type="radio"/>
Employer-sponsored plan:	<input type="radio"/>	<input type="radio"/>
Employer-sponsored plan 2:	<input type="radio"/>	<input type="radio"/>
Employer-sponsored plan 3:	<input type="radio"/>	<input type="radio"/>
Employer-sponsored plan 4:	<input type="radio"/>	<input type="radio"/>
Employer-sponsored plan 5:	<input type="radio"/>	<input type="radio"/>
Employer-sponsored plan 6:	<input type="radio"/>	<input type="radio"/>
Employer-sponsored plan 7:	<input type="radio"/>	<input type="radio"/>
Employer-sponsored plan 8:	<input type="radio"/>	<input type="radio"/>
Employer-sponsored plan 9:	<input type="radio"/>	<input type="radio"/>
Employer-sponsored plan 10:	<input type="radio"/>	<input type="radio"/>
Pension with an account balance which you can access as a lump sum:	<input type="radio"/>	<input type="radio"/>
Pension with an account balance which you can access as a lump sum 2:	<input type="radio"/>	<input type="radio"/>
Pension with an account balance which you can access as a lump sum 3:	<input type="radio"/>	<input type="radio"/>
Pension with an account balance which you can access as a lump sum 4:	<input type="radio"/>	<input type="radio"/>
Pension with an account balance which you can access as a lump sum 5:	<input type="radio"/>	<input type="radio"/>
Pension with an account balance which you can access as a lump sum 6:	<input type="radio"/>	<input type="radio"/>
Pension with an account balance which you can access as a lump sum 7:	<input type="radio"/>	<input type="radio"/>
Pension with an account balance which you can access as a lump sum 8:	<input type="radio"/>	<input type="radio"/>
Pension with an account balance which you can access as a lump sum 9:	<input type="radio"/>	<input type="radio"/>
Pension with an account balance which you can access as a lump sum 10:	<input type="radio"/>	<input type="radio"/>
Other type of tax-deferred retirement account (such as SEPs, Keoghs, etc.):	<input type="radio"/>	<input type="radio"/>
Other type of tax-deferred retirement account 2 (such as SEPs, Keoghs, etc.):	<input type="radio"/>	<input type="radio"/>
Other type of tax-deferred retirement account 3 (such as SEPs, Keoghs, etc.):	<input type="radio"/>	<input type="radio"/>

Other type of tax-deferred retirement account 4 (such as SEPs, Keoghs, etc.):	<input type="radio"/>	<input type="radio"/>
Other type of tax-deferred retirement account 5 (such as SEPs, Keoghs, etc.):	<input type="radio"/>	<input type="radio"/>
Other type of tax-deferred retirement account 6 (such as SEPs, Keoghs, etc.):	<input type="radio"/>	<input type="radio"/>
Other type of tax-deferred retirement account 7 (such as SEPs, Keoghs, etc.):	<input type="radio"/>	<input type="radio"/>
Other type of tax-deferred retirement account 8 (such as SEPs, Keoghs, etc.):	<input type="radio"/>	<input type="radio"/>
Other type of tax-deferred retirement account 9 (such as SEPs, Keoghs, etc.):	<input type="radio"/>	<input type="radio"/>
Other type of tax-deferred retirement account 10 (such as SEPs, Keoghs, etc.):	<input type="radio"/>	<input type="radio"/>
Checking account:	<input type="radio"/>	<input type="radio"/>
Checking account 2:	<input type="radio"/>	<input type="radio"/>
Checking account 3:	<input type="radio"/>	<input type="radio"/>
Checking account 4:	<input type="radio"/>	<input type="radio"/>
Checking account 5:	<input type="radio"/>	<input type="radio"/>
Checking account 6:	<input type="radio"/>	<input type="radio"/>
Checking account 7:	<input type="radio"/>	<input type="radio"/>
Checking account 8:	<input type="radio"/>	<input type="radio"/>
Checking account 9:	<input type="radio"/>	<input type="radio"/>
Checking account 10:	<input type="radio"/>	<input type="radio"/>
Savings account:	<input type="radio"/>	<input type="radio"/>
Savings account 2:	<input type="radio"/>	<input type="radio"/>
Savings account 3:	<input type="radio"/>	<input type="radio"/>
Savings account 4:	<input type="radio"/>	<input type="radio"/>
Savings account 5:	<input type="radio"/>	<input type="radio"/>
Savings account 6:	<input type="radio"/>	<input type="radio"/>
Savings account 7:	<input type="radio"/>	<input type="radio"/>
Savings account 8:	<input type="radio"/>	<input type="radio"/>
Savings account 9:	<input type="radio"/>	<input type="radio"/>
Savings account 10:	<input type="radio"/>	<input type="radio"/>
Money market account:	<input type="radio"/>	<input type="radio"/>

Money market account 2:	<input type="radio"/>	<input type="radio"/>
Money market account 3:	<input type="radio"/>	<input type="radio"/>
Money market account 4:	<input type="radio"/>	<input type="radio"/>
Money market account 5:	<input type="radio"/>	<input type="radio"/>
Money market account 6:	<input type="radio"/>	<input type="radio"/>
Money market account 7:	<input type="radio"/>	<input type="radio"/>
Money market account 8:	<input type="radio"/>	<input type="radio"/>
Money market account 9:	<input type="radio"/>	<input type="radio"/>
Money market account 10:	<input type="radio"/>	<input type="radio"/>
Mutual fund account (other than money market mutual fund):	<input type="radio"/>	<input type="radio"/>
Mutual fund account 2 (other than money market mutual fund):	<input type="radio"/>	<input type="radio"/>
Mutual fund account 3 (other than money market mutual fund):	<input type="radio"/>	<input type="radio"/>
Mutual fund account 4 (other than money market mutual fund):	<input type="radio"/>	<input type="radio"/>
Mutual fund account 5 (other than money market mutual fund):	<input type="radio"/>	<input type="radio"/>
Mutual fund account 6 (other than money market mutual fund):	<input type="radio"/>	<input type="radio"/>
Mutual fund account 7 (other than money market mutual fund):	<input type="radio"/>	<input type="radio"/>
Mutual fund account 8 (other than money market mutual fund):	<input type="radio"/>	<input type="radio"/>
Mutual fund account 9 (other than money market mutual fund):	<input type="radio"/>	<input type="radio"/>
Mutual fund account 10 (other than money market mutual fund):	<input type="radio"/>	<input type="radio"/>
Certificate of deposit (CD) portfolio (aggregate of all CD holdings):	<input type="radio"/>	<input type="radio"/>
Certificate of deposit (CD) portfolio 2 (aggregate of all CD holdings):	<input type="radio"/>	<input type="radio"/>
Certificate of deposit (CD) portfolio 3 (aggregate of all CD holdings):	<input type="radio"/>	<input type="radio"/>
Certificate of deposit (CD) portfolio 4 (aggregate of all CD holdings):	<input type="radio"/>	<input type="radio"/>
Certificate of deposit (CD) portfolio 5 (aggregate of all CD holdings):	<input type="radio"/>	<input type="radio"/>
Certificate of deposit (CD) portfolio 6 (aggregate of all CD holdings):	<input type="radio"/>	<input type="radio"/>
Certificate of deposit (CD) portfolio 7 (aggregate of all CD holdings):	<input type="radio"/>	<input type="radio"/>
Certificate of deposit (CD) portfolio 8 (aggregate of all CD holdings):	<input type="radio"/>	<input type="radio"/>
Certificate of deposit (CD) portfolio 9 (aggregate of all CD holdings):	<input type="radio"/>	<input type="radio"/>

Certificate of deposit (CD) portfolio 10 (aggregate of all CD holdings):	<input type="radio"/>	<input type="radio"/>
Brokerage account (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets):	<input type="radio"/>	<input type="radio"/>
Brokerage account 2 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets):	<input type="radio"/>	<input type="radio"/>
Brokerage account 3 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets):	<input type="radio"/>	<input type="radio"/>
Brokerage account 4 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets):	<input type="radio"/>	<input type="radio"/>
Brokerage account 5 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets):	<input type="radio"/>	<input type="radio"/>
Brokerage account 6 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets):	<input type="radio"/>	<input type="radio"/>
Brokerage account 7 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets):	<input type="radio"/>	<input type="radio"/>
Brokerage account 8 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets):	<input type="radio"/>	<input type="radio"/>
Brokerage account 9 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets):	<input type="radio"/>	<input type="radio"/>
Brokerage account 10 (including stocks, municipal, corporate, or other bonds, mutual funds, ETFs and other assets):	<input type="radio"/>	<input type="radio"/>
Directly held securities or other financial assets (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.):	<input type="radio"/>	<input type="radio"/>
Directly held securities or other financial assets 2 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.):	<input type="radio"/>	<input type="radio"/>
Directly held securities or other financial assets 3 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.):	<input type="radio"/>	<input type="radio"/>
Directly held securities or other financial assets 4 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.):	<input type="radio"/>	<input type="radio"/>
Directly held securities or other financial assets 5 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.):	<input type="radio"/>	<input type="radio"/>
Directly held securities or other financial assets 6 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.):	<input type="radio"/>	<input type="radio"/>
Directly held securities or other financial assets 7 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.):	<input type="radio"/>	<input type="radio"/>
Directly held securities or other financial assets 8 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.):	<input type="radio"/>	<input type="radio"/>

not at a brokerage, Dividend Reinvestment programs.):		
Directly held securities or other financial assets 9 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.):	<input type="radio"/>	<input type="radio"/>
Directly held securities or other financial assets 10 (US Treasury Bonds or savings bonds at Treasury Direct, stocks, bonds or individual securities you own that are not at a brokerage, Dividend Reinvestment programs.):	<input type="radio"/>	<input type="radio"/>
Annuity accounts with a balance or cash value (Exclude immediate annuities reported in the income section.):	<input type="radio"/>	<input type="radio"/>
Annuity accounts with a balance or cash value 2 (Exclude immediate annuities reported in the income section.):	<input type="radio"/>	<input type="radio"/>
Annuity accounts with a balance or cash value 3 (Exclude immediate annuities reported in the income section.):	<input type="radio"/>	<input type="radio"/>
Annuity accounts with a balance or cash value 4 (Exclude immediate annuities reported in the income section.):	<input type="radio"/>	<input type="radio"/>
Annuity accounts with a balance or cash value 5 (Exclude immediate annuities reported in the income section.):	<input type="radio"/>	<input type="radio"/>
Annuity accounts with a balance or cash value 6 (Exclude immediate annuities reported in the income section.):	<input type="radio"/>	<input type="radio"/>
Annuity accounts with a balance or cash value 7 (Exclude immediate annuities reported in the income section.):	<input type="radio"/>	<input type="radio"/>
Annuity accounts with a balance or cash value 8 (Exclude immediate annuities reported in the income section.):	<input type="radio"/>	<input type="radio"/>
Annuity accounts with a balance or cash value 9 (Exclude immediate annuities reported in the income section.):	<input type="radio"/>	<input type="radio"/>
Annuity accounts with a balance or cash value 10 (Exclude immediate annuities reported in the income section.):	<input type="radio"/>	<input type="radio"/>
Life insurance with cash value (Exclude term life insurance.):	<input type="radio"/>	<input type="radio"/>
Life insurance with cash value 2 (Exclude term life insurance.):	<input type="radio"/>	<input type="radio"/>
Life insurance with cash value 3 (Exclude term life insurance.):	<input type="radio"/>	<input type="radio"/>
Life insurance with cash value 4 (Exclude term life insurance.):	<input type="radio"/>	<input type="radio"/>
Life insurance with cash value 5 (Exclude term life insurance.):	<input type="radio"/>	<input type="radio"/>
Life insurance with cash value 6 (Exclude term life insurance.):	<input type="radio"/>	<input type="radio"/>
Life insurance with cash value 7 (Exclude term life insurance.):	<input type="radio"/>	<input type="radio"/>
Life insurance with cash value 8 (Exclude term life insurance.):	<input type="radio"/>	<input type="radio"/>
Life insurance with cash value 9 (Exclude term life insurance.):	<input type="radio"/>	<input type="radio"/>
Life insurance with cash value 10 (Exclude term life insurance.):	<input type="radio"/>	<input type="radio"/>

Section 529 College Savings Plans or Coverdell Accounts:	<input type="radio"/>	<input type="radio"/>
Section 529 College Savings Plans or Coverdell Accounts 2:	<input type="radio"/>	<input type="radio"/>
Section 529 College Savings Plans or Coverdell Accounts 3:	<input type="radio"/>	<input type="radio"/>
Section 529 College Savings Plans or Coverdell Accounts 4:	<input type="radio"/>	<input type="radio"/>
Section 529 College Savings Plans or Coverdell Accounts 5:	<input type="radio"/>	<input type="radio"/>
Section 529 College Savings Plans or Coverdell Accounts 6:	<input type="radio"/>	<input type="radio"/>
Section 529 College Savings Plans or Coverdell Accounts 7:	<input type="radio"/>	<input type="radio"/>
Section 529 College Savings Plans or Coverdell Accounts 8:	<input type="radio"/>	<input type="radio"/>
Section 529 College Savings Plans or Coverdell Accounts 9:	<input type="radio"/>	<input type="radio"/>
Section 529 College Savings Plans or Coverdell Accounts 10:	<input type="radio"/>	<input type="radio"/>
Other accounts not specified above:	<input type="radio"/>	<input type="radio"/>
Other accounts not specified above 2:	<input type="radio"/>	<input type="radio"/>
Other accounts not specified above 3:	<input type="radio"/>	<input type="radio"/>
Other accounts not specified above 4:	<input type="radio"/>	<input type="radio"/>
Other accounts not specified above 5:	<input type="radio"/>	<input type="radio"/>
Other accounts not specified above 6:	<input type="radio"/>	<input type="radio"/>
Other accounts not specified above 7:	<input type="radio"/>	<input type="radio"/>
Other accounts not specified above 8:	<input type="radio"/>	<input type="radio"/>
Other accounts not specified above 9:	<input type="radio"/>	<input type="radio"/>
Other accounts not specified above 10:	<input type="radio"/>	<input type="radio"/>

Collection: RVW_ALL_TABLE

Contains:

VRI_RVW_ALL [See appendix for screenshot example of such a summary table](#)

Thank you very much for providing this detailed information about your financial assets. Before continuing with the final sections of the survey, we would like to present you with a summary of your assets. You may click "Print" to print this for your own use.

Note: you may need to adjust your printer settings in order to print the entire summary.

PRINT

Collection: SECTION_H

Contains: H1, H2, H2_EXPLAIN, H5, H_COMMENTS, H1AW, LINK_CONSENT_YN, H1CW

Before we turn to the last part of this survey, we have a few questions for you about your experience so far.

Question: H1

H1

What sources of information have you consulted in answering the questions up to this point?

Please check all that apply.

- Account statements
- Tax returns
- Personal finance software (such as Quicken or MS Money)
- Asked someone else (specify):
- Other (specify):
- I did not use anything

Question: H2

Scale Summary		
Code	Label	Show-If
1	Yes	
2	Yes, but I consulted someone else for some information	
3	Yes, but someone else helped enter the responses into the survey	
4	Yes, but I consulted someone else for some information, and someone else helped enter the responses into the survey	
0	No	

H2

Have the questions been answered by the person to whom the invitation letter was addressed?

- Yes
- Yes, but I consulted someone else for some information
- Yes, but someone else helped enter the responses into the survey
- Yes, but I consulted someone else for some information, and someone else helped enter the

responses into the survey

No

Question: H2_EXPLAIN
Show if: (H2 = 0:[No])

H2_EXPLAIN

Please explain how the questions have been answered, and by whom.

Question: H5

H5

About how much time have you spent completing this survey so far?

minutes

Question: H_COMMENTS

H_COMMENTS

Do you have any comments about the survey so far? In particular, what did you think about answering questions about your financial assets by account (with nicknames), as compared to answering by type of asset?

Question: H1AW

Scale Summary		
Code	Label	Show-If
1	Yes	
0	No	
7	Maybe	

H1AW

Next, we would like to invite you to participate in a new way for surveys to gather financial data.

The University of Michigan has an agreement with a service used by leading financial institutions to help individuals track their investment and retirement accounts. We want to evaluate whether using such a service might improve or replace survey-based methods for measuring wealth. Rather than asking respondents questions, the service would, with your permission, obtain information directly from financial institutions.

Would you consider taking part in this effort?

Yes

No

Maybe

LINK_CONSENT0

Thank you for considering taking part in this effort. Please read the information on the

next page to make an informed decision about whether you would like to participate.

LINK_CONSENT1

Consent to Participate in the CogUSA Account Data Module Summary

Dr. Brooke Helppie-McFall, Dr. Matthew D. Shapiro and Dr. Robert J. Willis of the University of Michigan Survey Research Center invite you to participate in the Account Data Module of the CogUSA Study. The goal is to study whether this is an effective way to gather high-quality financial information in research studies of older Americans. We are asking to you participate because you have participated in other parts of the CogUSA Decision Making Study.

Rather than ask study participants like you to transcribe account information into the survey, the survey will—with your permission—obtain it directly from the websites of your financial institutions. This approach will save survey respondents' time and effort and improve the quality of financial information on surveys.

The University of Michigan has contracted with FeeX.com—a company that assists major financial institutions and their clients to track their financial accounts—to assist with this project. If you agree to participate, you will be asked to follow a unique link to a special website on FeeX.com for participants in the CogUSA Study. You will be asked what financial institutions you access on-line and asked to enter your account credentials for each financial account you view or manage online. The study team at the University of Michigan will receive encrypted information about your accounts and financial assets for up to 36 months.

Benefits

Although you may not directly benefit from being in this study, others may benefit if this approach to gathering financial information in survey projects is shown to increase data accuracy, reduce time and effort required of respondents, and/or decrease the cost of scientific studies that gather information about wealth or finances.

Risks

This study poses no more than minimal risk to participants. The primary risks include data breach or accidental or forced disclosure of research data or information. The study team and FeeX have implemented many safeguards to protect your privacy, security and confidentiality; we believe the risks to your participation are no greater than conducting other financial activities online.

Compensation

As an additional token of appreciation, you will receive a check from the University of Michigan for . Random assignment: half will see text "\$25 for the first financial institution plus \$5 per additional financial institution you successfully link, up to a maximum of \$50" and half will see similar with \$50, up to \$75.

Click "next" to continue reading.

Security and Confidentiality

- FeeX will not have access to sensitive personal information such as your name, email address, Social Security number, or mailing address.
- FeeX will use a random identification number created by the study team to enable the study team to later link your survey and account data. FeeX will not have the key to link your survey data to your account data.
- FeeX uses security protocols that are similar to those used by major financial institutions in the U.S. The FeeX security statement may be read at this link: <https://www.feex.com/security>.
- FeeX will never contact you or use your information to market to you. FeeX will not share your individual financial information for any purpose except this study. The FeeX privacy statement may be read at this link: <https://dr1s9gqaji23s.cloudfront.net/feex/legal/PP.pdf?i=1456667923>

- As part of participating in this portion of the study, you agree that you have read and accept the FeeX Terms of Use at <https://www.feex.com/terms-of-use/>.
- Data will be securely transferred between FeeX and the University of Michigan.
- Your account data will never be released in ways that would disclose your personal information.
- The study team will always keep your personally-identifiable information, such as name and contact information, separate from your survey responses and account data. Your raw account data will be kept on secure computers and/or servers, and will only be linked with your survey responses for scientific research purposes.
- Some aggregated and de-identified account data may be made available to others for research purposes, but never in a way that discloses your identity or the identity of financial institutions with which you do business. We plan to publish the results of this study, but will not include any information that would identify you.
- All members of the study team have signed a certificate of confidentiality to protect your information.

Participating in this study is completely voluntary. Even if you decide to participate now, you may change your mind and contact us at any time to withdraw your account data from this study.

For questions about this survey, please contact the CogUSA study team, Dr. Brooke Helppie-McFall or Dr. Matthew Shapiro. You may call us toll-free at 1-800-759-7947 or e-mail us at CogUSASTudy@umich.edu. If you have questions about your rights as a research participant, or wish to obtain information, ask questions, or discuss any concerns about this study with someone other than the researchers, please contact the University of Michigan Health Sciences and Behavioral Sciences Institutional Review Board, 2800 Plymouth Rd. Building 520, Room 1169. Ann Arbor, MI 48109-2800, (734) 936-0933 (or toll free, 1-866-936-0933), irbhsbs.umich.edu. Please refer to study number HUM00016894.

Question: LINK_CONSENT_YN

Show if: (H1AW is-any-of 1:[Yes] or 7:[Maybe])

Scale Summary		
Code	Label	Show-If
1	Yes, I understand the above information and would like to proceed.	
0	No, I am not willing to participate in this part of the study.	

LINK_CONSENT_YN

Would you like to proceed with the data linkage?

- Yes, I understand the above information and would like to proceed.
- No, I am not willing to participate in this part of the study.

Question: H1CW

Show if: (H1AW = 0:[No]) or (LINK_CONSENT_YN = 0:[No, I am not willing to participate in this part of the study.]) or (LINK_CONSENT_YN was-not-answered)

H1CW

Thank you for your consideration. Can you please tell us why you are not interested in taking part in this portion of the study? Your thoughts on this are very helpful to our research.

Thank you for agreeing to participate in this important effort. Please click "continue"

⁵⁹ Respondents who agree to linkage will see above, and click on "Continue" to submit and be redirected to linkage page.

below to go the website for this portion of the study.

Thank you again for taking the time to help with this important research.

Please click on the "Submit" button to complete the survey.

Respondents who do not agree to linkage will see the above 2 lines, followed by "Submit" button.

Appendix to CogEcon 2017 Survey Instrument

General Notes

1. As in our previous web surveys, except where you can see red reminder messages in the survey instrument, all questions will automatically display a “softcheck” message and continue to display the question if a respondent skips one or more items on a page and clicks “Next”. If the respondent clicks “Next” again, he/she will be able to continue to the next item, even if some items are still left blank. This general message appears below:

**Your responses are important to us. Please try to answer each question.
If you'd rather not answer, click 'Next' to continue.**

2. As in our previous web surveys, throughout the survey instrument pdf, there are double spaces between words and the question wording lacks a subject. Where these appear, we use “fills” to pipe in appropriate wording based on relationship status and our research goals. For example, fills may be “you,” “you and your spouse,” or “you and your partner.” Or “or” may be used in place of “and.” For unmarried but coupled respondents, whether we ask about a couple’s assets or just the respondent’s assets is determined by whether they indicate “planning a financial future together” or managing their finances jointly: if the assets are viewed as belonging to the couple jointly, we ask for information about these. Some response options are also suppressed if irrelevant, such as answer options mentioning a spouse or partner for a single respondent.
3. There are 2 randomizations in this survey.
 - a. First, approximately half of respondents will be randomly assigned to receive “Section_D” before “Section_VRI”, while the other half will see the items in the opposite order.
 - b. Second, approximately half of respondents will be randomly assigned to be offered \$25 to link the first account with FeeX, resulting in a maximum post-survey respondent payment of \$50 for a respondent who links 6 or more account. The other half will be offered \$50 for the first account, up to \$75 total. This is important in learning the role of incentives to attract additional participants in a data linkage.

Additional screenshots/information about screens not visible in survey instrument document

VRI_INTRO 1:

For respondents who receive the VRI section before section D, after the text: “In the next section we are going to ask you to provide information on the type and value of financial assets and accounts that you hold. You may wish to consult account statements or online resources if they will help you respond.” there will appear an additional sentence reading “Some of these questions may seem redundant. We

ask that you do your best to respond carefully, nonetheless. An important goal of this survey is to learn which approach to asking financial information is more effective.”

Section D items D15_ACCT_R_A-E and D16_ACCT_R_A-E

Above these items, which are only seen if an item is skipped on the previous screen, some fills are used to help respondents keep track of what they still need to report. An example of what this screen looks like to a respondent can be seen below.

**You did not complete the previous question.
If you can give an approximate value, please click "Back" to answer the question. If you cannot give an approximate value, please indicate a range below.**

So far, you have told us that you hold...
\$ 25,000 in short-term assets such as money market funds, CDs, and short-term Treasury bills.

Together with the values shown above, the amounts held in the types of assets listed below (for which you have not yet given a value) should sum approximately to **\$44,444**.

D15_ACCT_R_A-E
Please indicate a range for the following types of **assets** you and your spouse hold in tax-advantaged retirement accounts.

Mutual funds that hold both **stocks** and **bonds**, such as balanced or life-cycle funds.

VRI_Q60_TEXT

On the next page is an example of what the summary table below VRI_Q60_TEXT looks like.



Decision Making Survey 2017

For questions about the survey
please
call 1-800-759-7947
or email CogUSAStudy@umich.edu

VRI_Q60_TEXT

Please scroll down to see a summary of your household's investment, savings, and retirement accounts. Does this correctly reflect all of your household's investment, savings, and retirement accounts?

What's most important is that nothing significant is forgotten or double-counted in the list.

If this information is not correct, you will be able to go back to the beginning of this section to update your information.

It is very important for the rest of the survey that your responses here be as complete and accurate as possible and we appreciate you taking the time to thoroughly review and update if necessary.

Summary of My Household's Investment, Savings and Retirement Accounts

Tax-deferred retirement accounts

IRA

- 1: TIAA IRA
- 2: Vanguard IRA

Employer-sponsored retirement plan account (401(k), 403(b), 457, etc.)

NONE

Pension with an account balance which you can access as a lump sum

Ford Pension

Other type of tax-deferred retirement account (such as SEPs, Keoghs, etc.)

NONE

Savings/investment accounts not in a tax-deferred retirement plan or account

Checking account

Chase Checking

Savings account

Chase Savings

Money market account

NONE

Mutual fund account

NONE

Certificate of deposit (CD)

NONE

Brokerage account

NONE

Directly held securities or other financial assets

NONE

Insurance- and Education-related accounts

Annuity accounts with a balance or cash value

NONE

Life insurance with cash value

NONE

Educational-Related Accounts

NONE

Other accounts

Other accounts not specified above

NONE

VRI_Q60

Is this correct?

- Yes. This is accurate and I am ready to continue.
- No. I need to go back to make an update.

Next >>

VRI_Q61

Here is an example of what the question table in VRI_Q61 looks like when populated with respondents' correct number of accounts and their nicknames.

Tax-deferred retirement accounts	
IRA 1: B IRA	\$ 1,111
IRA 2: C IRA	\$ 2,222
Pension with an account balance which you can access as a lump sum: Ford Pension	\$ 3,333
Savings/investment accounts that are not in a tax-deferred retirement plan or account	
Checking account: Chase Checking	\$ 4,444
Savings account: Chase Savings	\$ 555,555
Educational accounts	
Section 529 College Savings Plans or Coverdell Accounts 1: C College Savings	\$ 66,666
Section 529 College Savings Plans or Coverdell Accounts 2: L College Savings	\$ 111,111

Next >>

RVW_VALUES summary table screenshot example

Please refer to the below table and verify the balances you reported for each of your accounts.

<u>Summary of My Household's Investment, Savings and Retirement Accounts</u>	
Tax-deferred retirement accounts	
IRA	
1: TIAA IRA	\$333
2: Vanguard IRA	\$33,232
Pension with an account balance which you can access as a lump sum	
Ford Pension	\$32,323
Savings/investment accounts not in a tax-deferred retirement plan or account	
Checking account	
Chase Checking	\$32,323
Savings account	
Chase Savings	\$323,232

VRI_Q62A

Is this correct?

- Yes. This is accurate and I am ready to continue.
- No. I need to go back to make an update.

VRI_Q63 Stock % table example

VRI_Q63

Thinking about all of the investment, savings, and retirement accounts that your household currently has, what percentage, if any, of each account is held in stocks or stock market investments? In other words, what percentage of the underlying assets or funds in each account is held in stock investments?

Account	Approximate Percentage Held in Stocks/Stock Market	Implied Value of Stock Investments in this account
IRA 1: TIAA IRA (\$333)	95 %	\$ 316
IRA 2: Vanguard IRA (\$33,232)	80 %	\$ 26,586
Pension with an account balance which you can access as a lump sum: Ford Pension (\$32,323)	50 %	\$ 16,162

Next >>

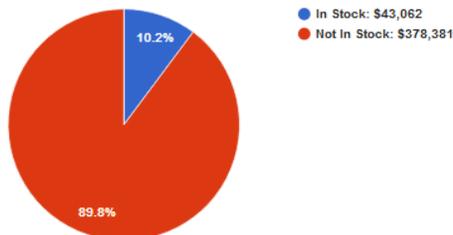
VRI_RVW_ALL example

Note: you may need to adjust your printer settings in order to print the entire summary.

PRINT

FINANCIAL ASSETS	
Retirement Total	\$65,888
• IRA	\$33,565
• Employer-sponsored retirement plan account (401(k), 403(b), 457, etc.)	None of this type
• Pension with an account balance which you can access as a lump sum	\$32,323
• Other type of tax-deferred retirement account (such as SEPs, Keoghs, etc.)	None of this type
NonRetirement Total	\$355,555
• Checking account	\$32,323
• Savings account	\$323,232
• Money market account	None of this type
• Mutual fund account	None of this type
• Certificate of deposit (CD)	None of this type
• Brokerage account	None of this type
• Directly held securities or other financial assets	None of this type
• Annuity accounts with a balance or cash value	None of this type
• Life insurance with cash value	None of this type
• Educational-Related Accounts	None of this type
• Other accounts not specified above	None of this type
Total	\$421,443

Percentage of Financial Assets in Stocks vs. Not in Stocks



Section II. Demo of Account Data Module

The interface of the linkage gateway for the Account Data Module can look like the following:

Welcome

Welcome to the Cognition and Aging in the USA Account Data Linkage Page.

We thank you for your willingness to participate in this effort. Please click “Next” to continue.

Next

For questions about the survey please
call 1-800-759-7947 or email CogUSAStudy@umich.edu

How to use

- Think about all retirement, investment, and bank accounts you view online.
 - Please make a LIST OF ACCOUNTS. You might want to make a checklist.
 - You will need your login information including USERNAME and PASSWORD.
- On the next screens, you will be asked to link each account for this study.
- Once you are ready to link your accounts, please click NEXT.

After each account is successfully linked, it will be listed in a summary table. If you need to stop and come back later, that is fine. Close your browser if you are going to leave your computer unattended. We have also emailed you a personal link to this site, so you will be able to easily access it again. To protect your information, if you exit the linkage process or it times out, you will not see the summary listing of previously-linked accounts if you return.

When you are done linking all desired accounts, please click “Done” to indicate that you are finished.

Please click “Next” to continue.

A blue rectangular button with the word "Next" written in white text in the center.

For questions about the survey please
call **1-800-759-7947** or email CogUSASTudy@umich.edu

Where do you hold your account?

Select Financial Institution

Add Account Information

Review & Finish



Choose from these popular options

Paychex	John Hancock	Principal	ADP
Voya	Ascensus	American Funds	Transamerica

Or search for other financial institutions

* Example: <https://login.fidelity.com/ftgw/Fidelity/NBPart/Login/Init>

[← Back](#)

For questions about the survey please
call 1-800-759-7947 or email CogUSAStudy@umich.edu

Where do you hold your account?

Select Financial Institution

Add Account Information

Review & Finish

1 2 3

Choose from these popular options

Paychex	John Hancock	Principal	ADP
Voya	Ascensus	American Funds	Transamerica

Or search for other financial institutions

🔍 Search by name or URL ✕

Popular results

- [Transamerica Retirement Solutions](http://www.divinvest.com/) ➤
http://www.divinvest.com/
- [Transamerica Retirement Services](http://www.ta-retirement.com/) ➤
http://www.ta-retirement.com/
- [Transamerica Retirement Solutions\(Pers & Admin\)](https://www.trsrretire.com/) ➤
https://www.trsrretire.com/

Other results

- [CAPITOL TRANSAMERICA CORPORATION \(Principal Financial Group \(Personal\) - Investments\)](http://www.principal.com/index.htm) ➤
http://www.principal.com/index.htm
- [Transamerica Service Annuity](https://www.transamericaannuities.com/) ➤
https://www.transamericaannuities.com/
- [Transamerica IDEX Mutual Funds](https://www.transamericaadvisor.com/wps/portal/tci/mutualfunds) ➤
https://www.transamericaadvisor.com/wps/portal/tci/mutualfunds

Not on the list? [Ask us to add it.](#)

SHOWING RESULTS 1 TO 6 OF 100 [NEXT](#)

[← Back](#)

Add your accounts

Select Financial Institution

Add Account Information

Review & Finish

1

2

3

Transamerica

User Name



Password



Show password

[Forgot your password?](#)

[← Back](#)

[Connect Securely](#)



Bank level 256 bit encryption



The system will be able to

Scan your account and see the data



The system will not be able to

Make any changes in your account



Need help?

Call 1-800-759-7947

Email us at CogUSASTudy@umich.edu

No credentials? Enter the account information manually [here](#).

Retrieving Information

Select Financial Institution

Add Account Information

Review & Finish



Transamerica

Establishing secure connection



Scanning account



Analyzing data



? Need help?

Call 1-800-759-7947

Email us at CogUSASTudy@umich.edu



\$305,344.00

Total Balance

Where do you hold your account?

Financial Institution

Add Account Information

Review & Finish



Transamerica

Imported accounts

Red Bull of North America 401(k) Plan
Fidelity NetBenefits \$196,746.00

Self-Managed Brokerage \$108,588.00
Fidelity Investments

Choose from these popular options

Paychex	John Hancock	Principal	ADP
Voya	Ascensus	American Funds	Transamerica

Or search for other financial institutions

Search by name or URL



Example: <https://login.fidelity.com/ftgw/Fidelity/NBPart/Login/Init>

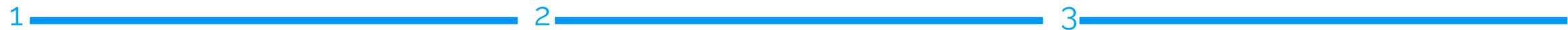
Back

Information Received

Select Financial Institution

Add Account Information

Review & Finish



We found the following accounts at
Transamerica

ACCOUNT NAME	ACCOUNT NUMBER	ACCOUNT TYPE	PARTICIPATION STATUS	BALANCE
Brokerage Window Account	6547	Brokerage Window	Not applicable	\$108,588
Red Bull North America, Inc. 401(k) Plan	8721	401(k)	<input checked="" type="radio"/> Current Employer <input type="radio"/> Previous Employer	\$196,746

Next

✔ Account successfully added

What would you like to do? Would you like to add an account, or are you done adding accounts?

INSTITUTION	ACCOUNT NAME	ACCOUNT TYPE	BALANCE
Transamerica	Red Bull North America 401(k) Plan	401(k)	\$196,746.00
Transamerica	Brokerage Window Account	Brokerage	\$108,588.00
Fidelity Investments	Personal IRA	IRA	\$100,006.55
		Total	\$405,340.55

Add another account

Done

For questions about the survey please call 1-800-759-7947 or email CogUSASTudy@umich.edu

Thank you!

Thank you for participating in this important study! We deeply appreciate your time and dedication to this research. You will receive a final thank-you packet in the mail in the next few weeks with an additional token of our appreciation.

Please close your browser to exit the study.

For questions about the survey please
call **1-800-759-7947** or email CogUSAStudy@umich.edu