

Income and Assets Module

BLOCK IAA

TIME

Time at start of Income and Assets module (set by IaWork)

If person is living alone (from Household Demographics), questions go to respondent only.

If person is living as part of a married or cohabiting couple and has indicated finances are shared between the couple (from Household Demographics), questions go to respondent on behalf of the couple.

If person is living as part of a married or cohabiting couple and has indicated finances are not shared between the couple (from Household Demographics), questions go to each respondent separately.

IaAsk

Asking for partner in HH, too?

- 1 Yes
- 2 No

IaWork*

We are interested in how people are managing financially these days. The next questions are about types of income *^you/you and your husband/wife/ partner* may receive. We may have asked *^you/you or your husband/wife/partner* some of the details earlier but it is important for

us to check that we understand your situation correctly. Did *^you/you or your husband/wife/partner* do any work for pay in the last year (that is since *^date a year ago*)?

- 1 Yes
- 2 No

IF worked for pay in the last year: IaWork = 1

| **IaSInc***

| About how much wage and salary income did *^you/you and your husband/wife/ | partner* receive in the last year before taxes and other deductions?

| Range: 0..999997

| CHECK: IF earned 200000 more in last year: IaSInc > 200000,

INTERVIEWER: | "Are you sure? *^Response at IaSInc* seems high - please check."

| *IF doesn't know or refuses to give salary income in last year:*

IaSInc =

| DK OR IaSInc = RF

| | **IaSincB***

| | Was it...

| | Brackets:(10000, 20000, 35000, 100000)

| ENDIF

ENDIF

IaSPen*

Did *^you/you or your husband/wife/partner* receive any money from a state pension in the last year (that is since *^date one year ago*)?

INCLUDE BASIC STATE PENSION AND SERPS

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- 1 Yes
- 2 No

IF received money from state pension last year and if responding for partner as well: IaSPen = 1 AND IAask = 1

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|  
| IaSPW*  
| Which of you received the state pension in the last year?  
| 1 Respondent only  
| 2 Spouse/partner only  
| 3 Both  
|  
| CHECK: IF respondent or both respondent and spouse/partner received  
| state | pension in the last year and respondent not retirement age:  
| (IaSPW = 1 OR | 3) AND ((ISex = Male AND IAgeof < 65) OR (ISex =  
| Female AND IAgeof <  
| 60)), INTERVIEWER: "Respondent says they are receiving the state  
| pension | before the age of retirement, please check. (^Respondent's  
| name is only  
| ^respondent's age)  
|  
| CHECK: IF spouse/partner or both received state pension in the last  
| year | and spouse/partner not at retirement age: (IaSPW = 2 OR 3) AND  
| ((DMSex[icouplen] = Male AND dmAge[icouplen] < 65) OR  
| (DMSex[icouplen] = | Female AND dmAge[icouplen] < 60)), INTERVIEWER:  
| "Respondent says they are | receiving the state pension before the  
| age of retirement, please check  
| (^spouse/partner's name is only ^spouse/partner's age)"  
|  
| ENDIF
```

IF received state pension last year and not responding for spouse/partner OR if responding on behalf of couple and respondent or respondent and spouse/partner received state pension last year: (IaSPen = 1 AND IAask <> 1) OR (IaSPW = 1 OR 3)

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|  
| IasPa*  
| How much do you receive from the state pension?  
| CODE PERIOD COVERED  
| 1 One week  
| 2 Two weeks  
| 3 Three weeks  
| 4 Four weeks  
| 5 Calendar month  
| 7 Two Calendar months  
| 8 Eight times a year  
| 9 Nine times a year  
| 10 Ten times a year  
| 13 Three months/13 weeks  
| 26 Six months/26 weeks  
| 52 One Year/12 months/52 weeks  
| 90 Less than one week  
| 95 One off/lump sum  
| 96 None of these (EXPLAIN IN A NOTE)  
|  
| IF valid response regarding period of state pension payment: IasPa
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```
=  
| RESPONSE  
|  
| IaPAM*  
| INTERVIEWER: ENTER AMOUNT
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| | IF DK AMOUNT BECAUSE RECEIVED WITH OTHER BENEFITS, ENTER TOTAL
AMOUNT
| | RECEIVED HERE
| | Range: 0..99997
| |
| | CHECK: IF amount of state pension is more than £300 per week,
more than | | £600 every two weeks, more than £1200 per month or more
than £1500 per
| | year: IaPAM <> 99997 AND (IasPa = 1 AND IaPAM > 300)) OR (IasPa =
2
| | AND IaPAM > 600) OR (IasPa = 4 or 5 AND IaPAM > 1200) OR (IasPa =
3
| | or 7..26, 52, 90..95 AND IaPAM > 15000), INTERVIEWER: "Are you
sure?
| | ^Reponse at IaPAM seems high - please check."
| |
| | ENDIF
| |
| | IF doesn't know, or refuses to give amount or frequency of state
pension | payments: (IasPa = DK OR IasPa = RF) OR (IaPAM = DK OR
IaPAM = RF)
| |
| | IF receives state pension once a week: IasPa = 1
| |
| | IaSPwB*
| | Did you receive...
| | Brackets: (50, 75, 100, 150)
| |
| | ELSEIF receives state pension every two weeks: IasPa = 2
| |
| | IaSPfB*
| | Did you receive...
| | Brackets: (100, 150, 200, 300)
| |
| | ELSEIF receives state pension every four weeks or one month:
IasPa = 4
| |
| | IaSPmB*
| | Did you receive...
| | Brackets: (200, 300, 400, 600)
| |
| | ELSEIF receives state pension once a year or as a lump sum: IasPa
= 52
| | Or IasPa = 95
| |
| | IaSPyB*
| | Did you receive...
| | Brackets: (2500, 4000, 5000, 7500)
| |
| | ELSE
| |
| | IaSPoB*
| | Did you receive per month...
| | Brackets: (200, 300, 400, 600)
| |
| | ENDIF
| |
| | ENDIF
| |
| | IaPly*

```

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| Did you start receiving this pension in the last year (that is
since

| ^date a year ago)?

- | 1 Yes
- | 2 No

| IF started receiving state pension last year: IaPly = 1

| **IaPlyw***

| Which month did you start receiving it?

- | 1 January
- | 2 February
- | 3 March
- | 4 April
- | 5 May
- | 6 June
- | 7 July
- | 8 August
- | 9 September
- | 10 October
- | 11 November
- | 12 December
- | 13 Winter (start of year)
- | 14 Spring
- | 15 Summer
- | 16 Autumn
- | 17 Winter (end of year)

| ENDDIF

ENDDIF

IF spouse/partner only OR both receiving state pension: IaSPW = 2 OR
3

| **IaSPp***

| How much does ^husband/wife/partner receive from the state pension?

| CODE PERIOD COVERED

- | 1 One week
- | 2 Two weeks
- | 3 Three weeks
- | 4 Four weeks
- | 5 Calendar month
- | 7 Two Calendar months
- | 8 Eight times a year
- | 9 Nine times a year
- | 10 Ten times a year
- | 13 Three months/13 weeks
- | 26 Six months/26 weeks
- | 52 One Year/12 months/52 weeks
- | 90 Less than one week
- | 95 One off/lump sum
- | 96 None of these (EXPLAIN IN A NOTE)

| IF valid response in IaSPp: IaSPp = RESPONSE

| **IaPPAm***

| INTERVIEWER: ENTER AMOUNT

| IF DK AMOUNT BECAUSE PAID WITH BENEFITS, ENTER TOTAL AMOUNT

RECEIVED

| HERE

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| | Range: 0..99997
| |
| | CHECK: IF amount of state pension is more than £300 per week,
more than | | £600 every two weeks, more than £1200 per month or more
than £1500 per
| | year: IaPPAm <> 99997 AND IaSPp = OneWeek AND IaPPAm > 300) OR
(IaSPp
| | = TwoWeek AND IaPPAm > 600) OR (IaSPp = 4 or 5 AND IaPPAm > 1200)
OR
| | (IaSPp = 3 or 7..26, 52, 90..95 AND IaPPAM > 15000), INTERVIEWER:
"Are | | you sure? ^Response at IaPPAm seems high - please check."
| |
| | ENDIF
| |
| | IF doesn't know or refused to give amount or frequency of state
pension: | (IaSPp = DK OR IaSPp = RF) OR (IaPPAm = DK OR IaPPAm = RF)
| |
| | IF receives state pension once a week: IaSPp = 1
| |
| | IaPPwB*
| | Did you receive...
| | Brackets: (50, 75, 100, 150)
| |
| | ELSEIF receives state pension every two weeks: IaSPp = 2
| |
| | IaPPfB*
| | Did you receive...
| | Brackets: (100, 150, 200, 300)
| |
| | ELSEIF receives state pension every four weeks, one month: IaSPp
= 4, 5
| |
| | IaPPmB*
| | Did you receive...
| | Brackets: (200, 300, 400, 600)
| |
| | ELSEIF receives state pension once a year Or as a lump sum: IaSPp
= 52 | | OR 95
| |
| | IaPPyB*
| | Did you receive...
| | Brackets: (2500, 4000, 5000, 7500)
| |
| | ELSE
| |
| | IaPPoB*
| | Did you receive per month...
| | Brackets: (200, 300, 400, 600)
| |
| | ENDIF
| |
| | ENDIF
| |
| | IaPlyp*
| | Did ^husband/wife/partner start receiving this pension in the last
year
| | (that is since ^date one year ago)?
| | 1 Yes
| | 2 No
| |
| | IF started receiving the pension in the last year: IaPlyp = 1

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|
| IaPlw*
| Which month did ^husband/wife/partner start receiving it?
| 1 January
| 2 February
| 3 March
| 4 April
| 5 May
| 6 June
| 7 July
| 8 August
| 9 September
| 10 October
| 11 November
| 12 December
|
| ENDIF
|
| ENDIF
|
| IaPPen*
| Did ^you/you or your husband/wife/partner receive any money from a
| personal or employer pension in the last year (that is since ^date
| one year ago)?
| 1 Yes
| 2 No
|
| IF received money from personal or employer pension in the last year:
| IaPPen = 1
|
| IaPPeI*
| About how much income did ^you/you and your husband/wife/partner
| receive | in the last year from personal or employer pensions before
| taxes and
| other deductions?
| DO NOT INCLUDE ANY LUMP SUMS RECEIVED
| Range: 0..999997
|
| Check: IF received more than £60000 in the last year: IaPPeI >
| 60000,
| INTERVIEWER: "Are you sure? ^Response at IaPPeI seems high - please
| check."
|
| IF doesn't know or refuses to give amount of personal or employer
| pension | received in the last year: IaPPeI = DK OR IaPPeI = RF
|
| IaPPeiB*
| Did you receive...
| Brackets: (1500, 4000, 8000, 30000)
|
| ENDIF
|
| ENDIF
|
| IaAnIn*
| Apart from anything you've already told me about, did ^you/you or
| your husband/wife/partner receive any annuity income in the last year
| (that is since ^date one year ago)?
| PRESS F9 FOR A DEFINITION OF ANNUITY INCOME: "Annuity income is when
| you make a lump sum payment to a financial institution and in return
| they give you a regular income for the rest of your life".

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- 1 Yes
- 2 No

IF received annuity income and respondent answering on behalf of couple: IaAnIn = 1 AND IAask = 1

| **IaAIly***
| Which of you received annuity income in the last year?
| 1 Respondent only
| 2 Spouse/partner only
| 3 Both

| *ENDIF*

IF either respondent only or both respondent and spouse/partner received annuity income last year, OR respondent not answering on behalf of couple and received annuity income last year: (IaAIly =1 OR 3) OR (IaAnIn = 1 AND IAask <> 1)

| **IaAIIm***
| How much annuity income did you receive in the last year after tax?
| Range: 0..999997

| CHECK: IF received more than £30000 annuity income in the last year:
| IaAIIm > 30000, INTERVIEWER: Are you sure? ^Response at IaAIIm seems high -
| please check.

| *IF doesn't know or refuses to give amount of annuity income: IaAIIm = DK*
| *OR IaAIIm = RF*

| **IaAimb**
| Did you receive...
| Brackets: (400, 1000, 2000, 15000)

| *ENDIF*

| *ENDIF*

IF spouse/partner only received annuity income in last year: IaAIly = 2

| **IaAIp**
| How much annuity income did ^husband/wife/partner receive in the last
| year after tax?
| Range: 0..999997

| CHECK: IF received more than £30000 annuity income in last year:
| IaAIp > 30000, INTERVIEWER: "Are you sure? ^Response at IaAIp seems high -
| please | check."

| *IF doesn't know or refuses to give amount of annuity income in last year: | IaAIp = DK OR IaAIp = RF*

| **IaAipb**
| Did ^husband/wife/partner receive...
| Brackets: (400, 1000, 2000, 15000)

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4 Attendance Allowance
5 Disability Living Allowance
6 Industrial Injuries Disablement Benefit
7 War Disablement Pension or War Widow's Pension
8 Invalid Care Allowance
9 Disabled person's tax credit formerly Disability Working Allowance

95 Some other benefit for people with disabilities SPECIFY
96 None of these [Exclusive code]

CHECK: For each benefit given at IaHdN that was not given at IaHdR,

INTERVIEWER: ^benefit at IaHdN wasn't given at IaHdR - Please change!

ENDIF

IF valid response at IaHdR and IaHdN and response is not None:
(IaHdR =

RESPONSE and IaHdN = RESPONSE) AND RESPONSE <> 96

IaT*

Benefit block type

Range: 0..97

Repeat IaP to IaBM for each benefit received last year OR that is currently being received (mentioned at IaHdR*)

IF not currently receiving benefit, ^lasttime = lasttime

ELSEIF currently receiving benefit, ^usually = usually

IaP*

How much did you ^usually receive from ^benefit ^lasttime

CODE PERIOD COVERED

- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these [EXPLAIN IN A NOTE]

IF gave valid period response: IaP = RESPONSE

IaA*

INTERVIEWER: ENTER AMOUNT.

IF DK AMOUNT BECAUSE RECEIVED WITH OTHER BENEFITS, ENTER

TOTAL AMOUNT RECEIVED HERE

ENTER 9997 IF AMOUNT ALREADY COUNTED ELSEWHERE

Range: 0..9997

ENDIF

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IF doesn't know or refuses to give amount or frequency of benefit received: (IaP = DK OR IaP = RF) OR (IaA = DK OR IaA = RF)

IF receives benefit once a week: IaP = 1

IawB*

Did you receive...

Brackets: (50, 75, 100, 150)

ELSEIF receives benefit every two weeks: IaP = 2

Iafb*

Did you receive...

Brackets: (100, 150, 200, 300)

ELSEIF receives benefit every four weeks OR one month: IaP = 4

OR 5

Iamb*

Did you receive...

Brackets: (200, 300, 400, 600)

ELSEIF receives benefit once a year OR as a lump sum: IaP = 52

Or IaP = 95

IayB*

Did you receive...

Brackets: (2500, 3750, 5000, 7500)0)

ELSE

Iaob*

Did you receive per month...

Brackets: (200, 300, 400, 600)

ENDIF

ENDIF

IF respondent is currently receiving benefits: IaT = 1, 3, 5 Or 7

IALY*

Did you start receiving this benefit in the last year, that is since ^date one year ago?

1 Yes

2 No

IF started receiving this benefit in the last year: IALY = 1

IaLM*

Which month did you start receiving it?

1 January

2 February

3 March

4 April

5 May

6 June

7 July

8 August

9 September

10 October

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| | | 11 November
| | | 12 December
| | |
| | | ENDIF
| | |
| | | ELSEIF not receiving benefits
| | |
| | | IaB*
| | | For how many weeks or months in the last year, that is since
^date
| | | one year ago, did you receive ^benefit?
| | | 1 Answer given in weeks
| | | 2 Answer given in months
| | |
| | | IF response is given in weeks: IaB = 1
| | |
| | | IaBW*
| | | INTERVIEWER: ENTER NUMBER OF WEEKS
| | | Range: 0..52
| | |
| | | ENDIF
| | |
| | | IF response is given in months: IaB = 2
| | |
| | | IaBM*
| | | INTERVIEWER: ENTER NUMBER OF MONTHS
| | | Range: 1..12
| | |
| | | ENDIF
| | |
| | | ENDIF
| | |
| | | ENDIF
| | |
| | | IF answering as part of a couple: IAAsk = Yes
| | |
| | | Iahdp*
| | | SHOW CARD Z
| | | Which, if any, of these health or disability benefits has
| | | ^husband/wife/partner received in the last year?
| | | INCLUDE ANY CURRENTLY RECEIVING
| | | PROBE: What others?
| | | CODE ALL THAT APPLY
| | | 1 Incapacity Benefit previously Invalidity Benefit
| | | 2 Severe Disablement Allowance SDA
| | | 3 Statutory sick pay SSP
| | | 4 Attendance Allowance
| | | 5 Disability Living Allowance
| | | 6 Industrial Injuries Disablement Benefit
| | | 7 War Disablement Pension or War Widow's Pension
| | | 8 Invalid Care Allowance
| | | 9 Disabled person's tax credit formerly Disability Working
Allowance
| | | 95 Some other benefit for people with disabilities SPECIFY
| | | 96 None of these [Exclusive code]
| | |
| | | IF received some other benefit for people with disabilities:
Iahdp = 95
| | |
| | | Iahdpo*
| | | INTERVIEWER: ENTER THE NAME OF OTHER BENEFIT
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| | | Text: up to 40 characters
| | |
| | | ENDIF
| | |
| | | IF valid response in Iahdp and response is not None: Iahdp =
RESPONSE
| | | AND <> 96
| | |
| | | IahdPn*
| | | SHOW CARD Z
| | | Which of these health and disability benefits is
| | | ^husband/wife/partner receiving at the moment?
| | | PROBE: What others?
| | | CODE ALL THAT APPLY
| | | 1 Incapacity Benefit previously Invalidity Benefit
| | | 2 Severe Disablement Allowance SDA
| | | 3 Statutory sick pay SSP
| | | 4 Attendance Allowance
| | | 5 Disability Living Allowance
| | | 6 Industrial Injuries Disablement Benefit
| | | 7 War Disablement Pension or War Widow's Pension
| | | 8 Invalid Care Allowance
| | | 9 Disabled person's tax credit formerly Disability Working
| | | Allowance
| | | 95 Some other benefit for people with disabilities SPECIFY
| | | 96 None of these [Exclusive code]
| | |
| | | CHECK: For each benefit given at IahdPn that was not given at
IahdP,
| | | INTERVIEWER: ^benefit at IahdPn wasn't given at IahdP. Please
change!
| | |
| | | ENDIF
| | |
| | | IF gave valid response at Iahdp and IahdPn and did not answer
None at
| | | Iahdp: (Iahdp = RESPONSE AND IahdPn = RESPONSE) AND Iahdp <>96
| | |
| | | Repeat Iap to IaBM for each benefit mentioned at IahdP* that
has been
| | | received last year OR is being received
| | |
| | | IaP*
| | | How much did you ^usually receive from ^benefit ^lasttime
| | | CODE PERIOD COVERED
| | | 1 One week
| | | 2 Two weeks
| | | 3 Three weeks
| | | 4 Four weeks
| | | 5 Calendar month
| | | 7 Two Calendar months
| | | 8 Eight times a year
| | | 9 Nine times a year
| | | 10 Ten times a year
| | | 13 Three months/13 weeks
| | | 26 Six months/26 weeks
| | | 52 One Year/12 months/52 weeks
| | | 90 Less than one week
| | | 95 One off/lump sum
| | | 96 None of these [EXPLAIN IN A NOTE]
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IF gave valid period response: IaP = RESPONSE

  IaA*
  INTERVIEWER: ENTER AMOUNT.
  / IF DK AMOUNT BECAUSE RECEIVED WITH OTHER BENEFITS, ENTER
  TOTAL AMOUNT RECEIVED HERE
  ENTER 9997 IF AMOUNT ALREADY COUNTED ELSEWHERE
  Range: 0..9997

  / ENDIF

  / IF doesn't know or refuses to give amount or frequency of
benefit:
  (IaP = DK OR IaP = RF) OR (IaA = DK OR IaA = RF)
  /
  / IF receives benefit once week: IaP = 1
  /
  IawB*
  Did you receive...
  Brackets: (50, 75, 100, 150)

  ELSEIF receives benefit every two weeks: IaP = 2

  IafB*
  Did you receive...
  Brackets: (100, 150, 200, 300)

  ELSEIF receives benefit every four weeks or one month: IaP =
4 OR 5

  IambB*
  Did you receive...
  Brackets: (200, 300, 400, 600)

  ELSEIF receives benefit once a year or as a lump sum: IaP =
52 Or

  IaP = 95

  IayB*
  Did you receive...
  Brackets: (2500, 3750, 5000, 7500)0)

  ELSE

  IaobB*
  Did you receive per month...
  Brackets: (200, 300, 400, 600)

  ENDIF

  / ENDIF

  / ENDIF

  IF respondent is currently receiving benefits: IaT = 1, 3, 5 Or 7

  IALY*
  Did you start receiving this benefit in the last year, that is
  since ^date one year ago?
  1 Yes
  2 No
```


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IaBeR*

SHOW CARD AA

Which of these benefits have you received in the last year?

INCLUDE ANY CURRENTLY RECEIVING

PROBE: What others?

CODE ALL THAT APPLY

- 1 Income Support or Minimum Income Guarantee MIG
- 2 Working Families Tax Credit formerly Family Credit
- 3 Job-seeker's Allowance formerly Unemployment Benefit
- 4 Guardian's Allowance
- 5 Widow's pension/Widowed mother's allowance/Widowed Parent's allowance/Bereavement allowance
- 6 Child Benefit
- 95 Some other State Benefit SPECIFY
- 96 None of these [Exclusive code]

IF response is other: IaBeR = 95

IaBeRo*

INTERVIEWER: ENTER THE NAME OF OTHER BENEFIT

Text: up to 40 characters

ENDIF

IF response at IaBeR and response is not None: IaBeR = RESPONSE AND IaBeR <> 96

IaBeN*

SHOW CARD AA

Which of these benefits are you receiving at the moment?

PROBE: What others?

CODE ALL THAT APPLY

- 1 Income Support or Minimum Income Guarantee MIG
- 2 Working Families Tax Credit formerly Family Credit
- 3 Job-seeker's Allowance formerly Unemployment Benefit
- 4 Guardian's Allowance
- 5 Widow's pension/Widowed mother's allowance/Widowed Parent's allowance/Bereavement allowance
- 6 Child Benefit
- 95 Some other State Benefit SPECIFY
- 96 None of these [Exclusive code]

CHECK: For each benefit given at IaBeN that was not given at IaBeR,

INTERVIEWER: ^benefit at IaBeN wasn't given at IaBeR - Please change!

ENDIF

IF valid response at IaBeR and at IaBeN and response is not None: (IaBeR | = RESPONSE and IaBeN = RESPONSE) AND RESPONSE <> 96

Repeat IaP* to IaBM* for each benefit mentioned at IaBeR* that has been

received OR is currently being received

IaP*

How much did you ^usually receive from ^benefit ^lasttime

CODE PERIOD COVERED

- 1 One week
- 2 Two weeks

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- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these [EXPLAIN IN A NOTE]

IF gave valid response regarding period of benefit: IaP =
RESPONSE

IaA*

INTERVIEWER: ENTER AMOUNT.
IF DK AMOUNT BECAUSE RECEIVED WITH OTHER BENEFITS, ENTER
TOTAL AMOUNT RECEIVED HERE
ENTER 9997 IF AMOUNT ALREADY COUNTED ELSEWHERE
Range: 0..9997

ENDIF

IF doesn't know or refuses to give amount or frequency of
benefit: (IaP | | = DK OR IaP = RF) OR (IaA = DK OR IaA = RF)

IF receives benefit once a week: IaP = 1

IawB*

Did you receive...
Brackets: (50, 75, 100, 150)

ELSEIF receives benefit every two weeks: IaP = 2

Iafb*

Did you receive...
Brackets: (100, 150, 200, 300)

ELSEIF receives benefit every four weeks or one month: IaP = 4

OR 5

Iamb*

Did you receive...
Brackets: (200, 300, 400, 600)

ELSEIF receives benefit once a year or as a lump sum: IaP = 52

Or IaP | | | = 95

IayB*

Did you receive...
Brackets: (2500, 3750, 5000, 7500)0)

ELSE

Iaob*

Did you receive per month...
Brackets: (200, 300, 400, 600)

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ENDIF
ENDIF
IF respondent is currently receiving benefits: IaT = 1, 3, 5 Or 7
IaLY*
Did you start receiving this benefit in the last year, that is
since ^date one year ago?
1 Yes
2 No

IF started receiving this benefit in the last year: IALY = 1
IaLM*
Which month did you start receiving it?
1 January
2 February
3 March
4 April
5 May
6 June
7 July
8 August
9 September
10 October
11 November
12 December

ENDIF

ELSEIF not currently receiving benefits

IaB*
For how many weeks or months in the last year, that is since
^date one year ago, did you receive ^benefit?
1 Answer given in weeks
2 Answer given in months

IF response is given in weeks: IaB = 1
IaBW*
INTERVIEWER: ENTER NUMBER OF WEEKS
Range: 0..52

ENDIF

IF response is given in months: IaB = 2
IaBM*
INTERVIEWER: ENTER NUMBER OF MONTHS
Range: 1..12

ENDIF

ENDIF

ENDIF

IF answering on behalf of couple: QIAa.IAAsk = Yes
```

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```

IaBeP*
SHOW CARD AA
Which, if any, of these benefits has ^husband/wife/partner
received in | | the last year?
INCLUDE ANY CURRENTLY RECEIVING
PROBE: What others?
CODE ALL THAT APPLY
1 Income Support or Minimum Income Guarantee MIG
2 Working Families Tax Credit formerly Family Credit
3 Job-seeker's Allowance formerly Unemployment Benefit
4 Guardian's Allowance
5 Widow's pension/Widowed mother's allowance/Widowed Parent's
allowance/Bereavement allowance
6 Child Benefit
95 Some other State Benefit SPECIFY
96 None of these [Exclusive code]

IF response is Other: IaBeP = 95

IaBepo*
INTERVIEWER: ENTER THE NAME OF OTHER BENEFIT
STRING[40]

ENDIF

IF response valid response and response is not None: IaBeP =
RESPONSE
AND IaBeP <> 96

IaBePn*
SHOW CARD AA
Which of these benefits is ^husband/wife/partner receiving at
the
moment?
PROBE: What others?
CODE ALL THAT APPPLY
1 Income Support or Minimum Income Guarantee MIG
2 Working Families Tax Credit formerly Family Credit
3 Job-seeker's Allowance formerly Unemployment Benefit
4 Guardian's Allowance
5 Widow's pension/Widowed mother's allowance/Widowed
Parent's
allowance/Bereavement allowance
6 Child Benefit
95 Some other State Benefit SPECIFY
96 None of these [Exclusive code]

CHECK: For each benefit given at IaBePn and not given at IaBeP,
INTERVIEWER: ^benefit at IaBePn wasn't given at IaBeP Please
change!

IF valid response at IaBeP and at IaBePn and response is not
None at | | | IaBeP: (IaBeP = RESPONSE and IaBePn = RESPONSE) AND
IaBeP <> 95

Repeat IaP* to IaBM* for each benefit mentioned at IaBeP that
has
been received Or is currently being received.

IaP*

```

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```

How much did you ^usually receive from ^benefit ^lasttime
CODE PERIOD COVERED
1 One week
2 Two weeks
3 Three weeks
4 Four weeks
5 Calendar month
7 Two Calendar months
8 Eight times a year
9 Nine times a year
10 Ten times a year
13 Three months/13 weeks
26 Six months/26 weeks
52 One Year/12 months/52 weeks
90 Less than one week
95 One off/lump sum
96 None of these [EXPLAIN IN A NOTE]

/ IF gave valid response period of benefit: IaP = RESPONSE
|
| IaA*
| INTERVIEWER: ENTER AMOUNT.
| / IF DK AMOUNT BECAUSE RECEIVED WITH OTHER BENEFITS, ENTER
| TOTAL AMOUNT RECEIVED HERE
| ENTER 9997 IF AMOUNT ALREADY COUNTED ELSEWHERE
| Range: 0..9997
|
| / ENDIF
|
| / IF doesn't know or refuses to give amount or frequency of
benefit:
| / (IaP = DK OR IaP = RF) OR (IaA = DK OR IaA = RF)
|
| IF receives benefit once a week: IaP = 1
|
| IawB*
| Did you receive...
| Brackets: (50, 75, 100, 150)
|
| ELSEIF receives benefit every two weeks: IaP = 2
|
| Iafb*
| Did you receive...
| Brackets: (100, 150, 200, 300)
|
| ELSEIF receives benefit every four weeks or one month: IaP
= 4 OR | | | | 5
|
| Iamb*
| Did you receive...
| Brackets: (200, 300, 400, 600)
|
| ELSEIF receives benefit once a year or as a lump sum: IaP =
52 Or
|
| IaP = 95
|
| IayB*
| Did you receive...
| Brackets: (2500, 3750, 5000, 7500)0)
|
| ELSE

```


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```
| | | | Range: 1..12
| | | | ENDIF
| | | | ENDIF
| | | | ENDIF
| | IF respondent's age is 60 or over OR if person is answering on
| | behalf
| | of the couple and the spouse/partner is 60 or over: (IAgeOf >=
| | 60) OR
| | (QIAa.IAAsk = Yes AND DmAge[icouplen >= 60)
| |
| | IaFuel
| | Did ^you/you or your husband/wife/partner receive a Winter Fuel
| | Payment in the last year (that is since ^date one year ago)?
| | 1 Yes
| | 2 No
| |
| | ENDIF
| |
| | ENDIF
| |
| | ENDIF
```

NEW BLOCK - IAC

TIME

Time at start of financial assets section (set by IaFAInt)

IF person is married or cohabiting and respondent and partner/spouse are each receiving IA separately: IF (Icouple = married OR Icouple = cohabit) AND (IAskIA = Yes) AND (ICaskIA = Yes), ^soletxt = "Please include only savings and investments held in your sole name."

IaFAInt*

Savings and Investments are an important part of some household's finances.

The next questions ask about a number of different kinds of savings or

investments ^you/you or your husband/wife/partner may have. ^soletxt Press 1 and Enter to continue

IaSI*

SHOW CARD BB

Which, if any, of these savings and investments do ^you/you or your husband/wife/partner have?

PROBE: What others?

CODE TESSA-ONLY ISA'S (TOISA'S) AS ISA'S

CODE ALL THAT APPLY

- 1 Current Account at a bank, building society or elsewhere
- 2 Savings Account at a bank, building society or elsewhere
- 3 TESSA
- 4 ISA
- 5 Premium Bonds
- 6 National Savings Accounts or Certificates
- 7 PEP
- 8 Stocks and/or Shares
- 9 Share Options/Employee share ownership
- 10 Share clubs

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- 11 Unit or Investment Trusts
- 12 Bonds and Gilts (government or corporate)
- 95 Other Savings or Investments
- 96 None of these [Exclusive code]

IF holds current or savings accounts at a bank, building society or elsewhere: IaSI = 1 OR 2

| IF holds current and savings accounts at a bank, building society or elsewhere: IaSI = 1 AND 2, ^savtxt = current and savings account(s) AND

| ^odtxt = IF CURRENT ACCOUNT OVERDRAWN, ENTER AMOUNT IN SAVINGS ACCOUNT

| ONLY

| ELSEIF holds savings account only at a bank, building society or elsewhere: IaSI = 2, ^savtxt = savings account(s)

| ELSE: ^savtxt = current account(s) AND ^odtxt = ENTER `0` IF OVERDRAWN

| **IaSava***

| In total, how much do ^you/you and your husband/wife/partner have in

| your ^savtxt (at the bank, building society or elsewhere)?

| ^odtxt

| Range: 0..9999997

| CHECK: IF has savings of more than £300000: IaSava > 300000,

INTERVIEWER: | "Are you sure? ^Response at IaSava seems high - please check."

| IF doesn't know or refuses to give amount of savings: IaSava = DK

OR

| IaSava = RF

| **IaSavab***

| Do ^you/you and your husband/wife/partner have...

| Brackets: (1000, 5000, 20000, 150000)

| ENDIF

| **IaSint***

| About how much interest did ^you/you and your husband/wife/partner receive from (this/these) account(s) in the last year after tax?

| Range: 0..99997

| CHECK: IF received more than £15000 interest last year: IaSint > 15000,

INTERVIEWER: "Are you sure? ^Response at IaSint seems high - please check."

| IF doesn't know or refuses to give amount of interest received last year: | IaSint = DK OR IaSint = RF

| **IaSintB***

| Did ^you/you and your husband/wife/partner receive...

| | Brackets: (10, 25, 100, 500, 7500)

| ENDIF

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ENDIF

IF has Tessa: IaSI = 3

IaTI*

How much do ^you/you and your husband/wife/partner have in your TESSA's?

Range: 0..99997

CHECK: IF has more than £100000 in TESSA's: IaTI > 100000,

INTERVIEWER:

"Are you sure? ^Response at IaTI seems high - please check."

IF doesn't know or refuses to give amount in TESSA's: IaTI = DK OR IaTI = RF)

IaTIB*

Do ^you/you and your husband/wife/partner have...

Brackets: (5000, 10000, 20000, 50000)

ENDIF

IaTii*

About how much interest did ^you/you and your husband/wife/partner receive from these accounts in the last year?

Range: 0..9997

CHECK: IF received more than £8000 interest last year: IaTii > 8000,

INTERVIEWER: "Are you sure? ^Response at IaTii seems high - please check."

IF doesn't know or refuses to give amount of interest received last year: IaTii = DK OR IaTii = RF

IaTiib*

Did ^you/you and your husband/wife/partner receive...

Brackets: (250, 500, 1000, 4000)

ENDIF

ENDIF

IF has an Isa: IaSI = 4

IaIsa*

Which of the following do ^you/you and your husband/wife/partner have in your ISA(s) ... READ OUT EACH IN TURN AND CODE ALL THAT APPLY...

- 1 ... cash?
- 2 ... life insurance?
- 3 ... stocks and shares?

IF has cash in ISA: IaIsa = 1

IaCIsa*

How much do ^you/you and your husband/wife/partner currently have in

the cash components of your ISA(s)?

Range: 0..999997

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```
| | CHECK: IF has more than £40000 in cash components of ISA(s):
IaCIsa >
| | 40000, INTERVIEWER: "Are you sure? ^Response at IaCIsa seems high
-
| | please check."
| | IF doesn't know or refuses to give amount of cash in ISA(s):
IaCIsa =
| | DK OR IaCIsa = RF
| |
| | IaCIsab*
| | Do ^you/you and your husband/wife/partner currently have...
| | Brackets: (5000, 10000, 15000, 20000)
| |
| | ENDIF
| |
| | ENDIF
| |
| | IF has life insurance in ISA: IaIsa = 2
| |
| | IaLIsa*
| | How much is the life-insurance component of ^your/your and your
| | husband's/wife's/partner's ISA(s) currently worth?
| | Range: 0..999997
| |
| | CHECK: IF has more than £20000 in the life-insurance component of
IaLIsa > 20000, INTERVIEWER: "Are you sure? ^Response at
IaLIsa seems
| | high - please check."
| | IF doesn't know or refuses to give amount of life insurance
component
| | in ISA: IaLIsa = DK OR IaLIsa = RF
| |
| | IaLIsab*
| | Is it worth...
| | Brackets: (2000, 4000, 7500, 10000)
| |
| | ENDIF
| |
| | ENDIF
| |
| | IF has stocks or shares in ISA: IaIsa = 3
| |
| | IaSIsa*
| | How much is the stocks and shares component of your and ^your
| | husband's/wife's/partner's ISA(s) currently worth?
| | Range: 0..999997
| |
| | CHECK: IF has more than £100000 in the stocks and shares
component of
| | ISA: IaSIsa > 100000, INTERVIEWER: "Are you sure? ^Response at
IaSIsa
| | seems high - please check."
| | IF doesn't know or refuses to give amount in stocks and shares
component of ISA: IaSIsa = DK OR IaSIsa = RF
| |
| | IaSIsab*
| | Is it worth...
| | Brackets: (5000, 10000, 25000, 50000)
```

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```
| | |
| | |
| | | ENDIF
| | |
| | | ENDIF
| | |
| | | IaIsaD*
| | | Not including any income that was re-invested, about how much
| | | income did | ^you/you and your husband/wife/partner receive from
| | | (this/these) ISA(s)
| | | in the last year?
| | | Range: 0..99997
| | |
| | | CHECK: IF received more than £4000 last year from this/these
| | | ISA(s):
| | | | IaIsaD > 4000, INTERVIEWER: "Are you sure? ^Response at IaIsaD
| | | seems high | - please check."
| | |
| | | | IF doesn't know or refuses to give amount of income received:
| | | IaIsaD = DK | OR IaIsa = RF
| | |
| | | | IaIsaDb*
| | | | Brackets: (100, 150, 300, 2000)
| | |
| | | | ENDIF
| | |
| | | ENDIF
| | |
| | | IF has premium bonds: IaSI = 5
| | |
| | | | IaNPB*
| | | | How much do ^you/you and your husband/wife/partner have in Premium
| | | | Bonds?
| | | | Range: 0..9999997
| | | |
| | | | CHECK: IF has more than £10000 in premium bonds: IaNPB > 10000,
| | | | INTERVIEWER: "Are you sure? ^Response at IaNPB seems high - please
| | | | check."
| | | |
| | | | | IF doesn't know or refuses to give amount in premium bonds: IaNPB =
| | | | DK OR | IaNPB = RF
| | | |
| | | | | IaN PBB*
| | | | | Do ^you/you and your husband/wife/partner have...
| | | | | Brackets: (100, 200, 500, 5000)
| | | |
| | | | | ENDIF
| | | |
| | | | | IaN PBP*
| | | | | How much prize income did ^you/you and your husband/wife/partner
| | | | | receive | from these bonds in the last year?
| | | | | Range: 0..999997
| | | | |
| | | | | CHECK: IF received more than £20000 from bonds last year: IaN PBP >
| | | | | 20000, | INTERVIEWER: "Are you sure? ^Response at IaN PBP seems high -
| | | | | please
| | | | | check."
| | | | |
| | | | | | IF doesn't know or refuses to give amount from bonds last year:
| | | | | IaN PBP = | DK) OR (IaN PBP = RF
| | | | |
| | | | | | Ia PBP*
```

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```
| | Did ^you/you and your husband/wife/partner receive...
| | Brackets: (50, 100, 1000, 10000)
| |
| | ENDIF
```

```
| |
| | ENDIF
```

```
| IF has National Savings Accounts or Certificates: IaSI = 6
```

```
| | IaNS*
```

```
| | How much do ^you/you and your husband/wife/partner have in your
| | National Savings Accounts or Certificates?
| | Range: 0..9999997
```

```
| | CHECK: IF has more than £200000 in National Savings Accounts or
| | Certificates: IaNS > 200000, INTERVIEWER: "Are you sure? ^Response
| | at IaNS seems high - please check."
```

```
| | IF doesn't know or refuses to give amount in National Savings
Accounts or | Certificates: IaNS = DK OR IaNS = RF
```

```
| | IaNSB*
```

```
| | Do ^you/you and your husband/wife/partner have...
| | Brackets: (500, 2500, 10000, 100000)
```

```
| | ENDIF
```

```
| | IaNSi*
```

```
| | About how much interest did ^you/you and your husband/wife/ partner
| | receive from these accounts or certificates in the last year after
tax?
| | Range: 0..99997
```

```
| | CHECK: IF received more than £10000 from these accounts or
certificates
| | in the last year: IaNSi > 10000, INTERVIEWER: "Are you sure?
^Response at
| | IaNSi seems high - please check."
```

```
| | IF doesn't know or refuses to give amount from these accounts or
certificates in the last year: IaNSi = DK OR IaNSi = RF
```

```
| | IaNSIB*
```

```
| | Did ^you/you and your husband/wife/ partner receive...
| | Brackets: (10, 50, 150, 5000)
```

```
| | ENDIF
```

```
| | ENDIF
```

```
| IF holds PEP: IaSI = 7
```

```
| | IaIP*
```

```
| | If you chose to sell your Personal Equity Plan(s) today, about how
much
| | would ^you/you and your husband/wife/partner have after paying any
fees?
| | Range: 0..999997
```

```
| | CHECK: IF would have more than £200000 from sale of Personal Equity
```

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```
| Plan(s): IaIP > 200000, INTERVIEWER: "Are you sure? ^Response at
IaIP
| seems high - please check."
|
| IF doesn't know or refuses to give amount from sale of PEP(s): IaIP
= DK | OR IaIP = RF
|
| Iaipb*
| Would ^you/you and your husband/wife/partner have...
| Brackets: (5000, 10000, 25000, 100000)
|
| ENDIF
|
| IaIPi*
| Not including any income that was reinvested, about how much income
did
| ^you/you and your husband/wife/partner receive from these Personal
Equity | Plan(s) in the last year?
| Range: 0..99997
|
| CHECK: IF received more than £15000 from PEP(s) last year: IaIPi >
15000, | INTERVIEWER: "Are you sure? ^Response at IaIPi seems high -
please
| check."
|
| IF doesn't know or refuses to give amount from PEP(s) last year:
IaIPi = | DK OR IaIPi = RF
|
| IaIPib*
| Did ^you/you and your husband/wife/partner receive...
| Brackets: (200, 500, 1000, 7500)
|
| ENDIF
|
| ENDIF
|
| IF holds Stocks and/or Shares OR Share Options/Employer Share
Ownership OR Share Clubs: IaSI = 8, 9 OR 10
|
| IF holds stocks and/or shares AND share options/employee share
ownership | AND share clubs: IaSI = 8 AND 9 AND IaSI = 10, ^IaTxt5 =
| stocks and shares, share options and share club shares.
| ELSEIF holds stocks and/or shares AND share options/employee share
ownership IaSI = 8 AND 9, ^IaTxt5 = stocks and shares and share
options.
| ELSEIF holds stocks and/or shares AND share clubs: IaSI = 8 AND 10,
^IaTxt5 = stocks and shares and share club shares.
| ELSEIF holds share options AND share clubs: IaSI = 9 AND 10,
^IaTxt5 =
| share options and share club shares.
| ELSEIF holds stocks and/or shares: IaSI = 8, ^IaTxt5 = stocks and
shares.
| ELSEIF holds share options: IaSI = 9, ^IaTxt5 = share options.
| ELSEIF holds share club shares: IaSI = 10, ^IaTxt5 = share club
share`s.
|
| IaSSS*
| If you chose to sell your ^iaTxt5 today, about how much would
^you/you
| and your husband/wife/partner have?
| Range: 0..999997
```

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```
|
| CHECK: IF would have more than £200000 from sale of Stocks/Shares
OR
| Share Options/Employer Share Ownership OR Share Clubs : IaSSS >
200000,
| INTERVIEWER: "Are you sure? ^Response at IaSSS seems high - please
check."
|
| IF doesn't know or refuses to give amount from sale of
Stocks/Shares OR
| Share Options/Employer Share Ownership OR Share Clubs: IaSSS = DK
OR
| IaSSS = RF
|
| IaSSSb*
| Would ^you/you and your husband/wife/partner have...
| Brackets: (1000, 2500, 10000, 100000)
|
| ENDIF
|
| IaSSSi*
| About how much dividend income did ^you/you and your husband/wife/
| partner receive from ^iatxt5 in the last year after tax?
| Range: 0..999997
|
| CHECK: IF received more than £30000 dividend income last year:
IaSSSi >
| 30000, INTERVIEWER: "Are you sure? ^Response at IaSSSi seems high -
| please check."
|
| IF doesn't know or refuses to give amount of dividend income last
year:
| IaSSSi = DK OR IaSSSi = RF
|
| IaSSSib*
| Did ^you/you and your husband/wife/partner receive...
| Brackets: (50, 150, 600, 15000)
|
| ENDIF
|
| IaShTyp*
| Which of the following types of shares do ^you/you and your
| husband/wife/partner have...
| READ OUT EACH IN TURN AND CODE ALL THAT APPLY ...
| 1 ...shares in privatised industries (for example, British Telecom,
| British Gas or RailTrack)?
| 2 ...shares in demutualised building societies or other mutual
societies?
| 3 ...shares in other UK listed companies?
| 4 ...shares in foreign listed companies?
|
| IF has shares in privatised industries: IaShTyp = 1
|
| IaDeNat*
| Did ^you/you and your husband/wife/partner buy any of these
shares in
| privatised industries at the time they were privatised?
| 1 Yes - all of them
| 2 Yes - some of them
| 3 No - none of them
|
```

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```
| ENDIF
|
| IF has shares in demutualised building societies: IaShTyp = 2
|
|   | IaDeMut*
|   | Did ^you/you and your husband/wife/partner buy or receive any of
these | | shares in de-mutualised building societies at the time they
de-
|   | mutualised?
|   | 1 Yes - all of them
|   | 2 Yes - some of them
|   | 3 No - none of them
|
| ENDIF
ENDIF

IF holds Unit or Investment Trust: IaSI = 11
|
|   | IaUIT*
|   | If you chose to sell your Unit trusts or Investment trusts today,
about
|   | how much would ^you/you and your husband/wife/partner have?
|   | Range: 0..999997
|
|   | CHECK: IF would have more than £400000 from sale of UIT: IaUIT >
400000,
|   | INTERVIEWER: "Are you sure? ^Response at IaUIT seems high - please
check."
|
|   | IF doesn't know or refuses to give amount from sale of UIT: IaUIT =
DK OR | IaUIT = RF
|
|   |   | IaUITb*
|   |   | Would ^you/you and your husband/wife/partner have...
|   |   | Brackets: (5000, 10000, 50000, 200000)
|   |
|   | ENDIF
|
|   | IaUITi*
|   | Not including any income that was re-invested, about how much
income did | ^you/you and your husband/wife/partner receive from
these Unit trusts or | Investment trusts in the last year after tax?
|   | Range: 0..999997
|
|   | CHECK: IF received more than £20000 from the Unit trusts or
Investment
|   | trusts in the last year IaUITi > 20000, INTERVIEWER: "Are you sure?
|^Response at IaUITi seems high - please check."
|
|   | IF doesn't know or refuses to give amount from Unit trusts or
Investment | trusts last year: IaUITi = DK OR IaUITi = RF
|
|   |   | IaUITib*
|   |   | Did ^you/you and your husband/wife/partner receive...
|   |   | Brackets: (150, 500, 12500, 10000)
|   |
|   | ENDIF
ENDIF
```

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IF has Bonds and Gilts: IaSI = 12

| **Iabg***
| If you chose to sell your bonds and gilts today, about how much
would
| ^you/you and your husband/wife/partner have?
| Range: 0..999997

| CHECK: IF would have more than £200000 from sale of bonds and gilts
today: Iabg > 200000, INTERVIEWER: "Are you sure? ^Response at Iabg
seems | high - please check."

| IF doesn't know or refuses to give amount from sale of bonds and
gilts

| today: Iabg = DK OR Iabg = RF

| **Iabgb***
| Would ^you/you and your husband/wife/partner have...
| Brackets: (10000, 20000, 40000, 100000)

| ENDIF

| **Iabgi***
| About how much income did ^you/you and your husband/wife/partner
receive | from these Bonds and Gilts in the last year after tax?
| Range: 0..999997

| CHECK: IF received more than £100000 from bonds and gilts last
year:

| Iabgi > 100000, INTERVIEWER: "Are you sure? ^Response at Iabgi
seems high
| - please check."

| IF doesn't know or refuses to give amount received from bonds and
gilts | last year: Iabgi = DK OR Iabgi = RF

| **Iabgib***
| Did ^you/you and your husband/wife/partner receive...
| Brackets: (100, 300, 1000, 50000)

| ENDIF

ENDIF

IF has other savings or investments: IaSI = 95

| **IaSIo***
| How much in total do ^you/you and your husband/wife/partner have in
other savings or investments?
| Range: 0..999997

| CHECK: IF has more than £200000 in other savings and investments:
IaSIo > | 200000, INTERVIEWER: "Are you sure? ^Response at IaSIo
seems high -
| please check."

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```
| IF doesn't know or refuses to give amount in other savings and
| investments: IaSiO = DK OR IaSiO = RF
|
|   IaSiob*
|   Do ^you/you and your husband/wife/partner have...
|   Brackets: (1000, 5000, 20000, 100000)
|
| ENDIF
|
|   IaSiOi*
|   About how much interest did ^you/you and your husband/wife/partner
|   receive from these other savings or investments in the last year
| after
| tax?
| Range: 0..999997
|
| CHECK: IF received more than £20000 from other savings and
| investments
| last year: IaSiOi > 20000, INTERVIEWER: Are you sure? ^Response at
| IaSiOi
| seems high - please check.
|
| IF doesn't know or refuses to give amount from other savings and
| investments last year: IaSiOi = DK OR IaSiOi = RF
|
|   IaSiOib*
|   Did ^you/you and your husband/wife/partner receive...
|   Brackets: (50, 150, 500, 10000)
|
| ENDIF
|
| ENDIF
|
| IF has some savings or investments: IaSI = RESPONSE AND IaSI <> 96
|
|   IASick*
|   INTERVIEWER: PLEASE CHECK FINANCIAL ASSETS SUMMARY BELOW:
|   'DISPLAY SUMMARY TABLE OF ALL FINANCIAL ASSETS'
|   GO BACK AND CHANGE ANY THAT ARE INCORRECT
|   Press 1 and Enter to continue
|
| ENDIF
|
| IF share type is NOT shares in privatised industries: IaShTyp <> 1
|
|   IaDen*
|   Did ^you/you or your husband/wife/partner ever buy any shares when
| the
| nationalised industries (for example, British Telecom, British Gas
| or
| RailTrack) were privatised?
| 1   Yes
| 2   No
|
| ENDIF
|
| IF share type is NOT shares in demutualised building societies or
| other mutual societies: IaShTyp <> 2
|
|   IaDem*
|   Did ^you/you or your husband/wife/partner ever receive any windfall
```

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```
| shares as a result of a demutualisation of a building society or
| other
| mutual institution?
| 1 Yes
| 2 No
|
ENDIF
```

IaLi*

Do ^you/you or your husband/wife/partner have any life insurance policies?

- 1 Yes
- 2 No

IF has life insurance policies: IaLi = 1

```
|
| IF answering as part of couple: IAask = 1
|
| IaLiW*
| Which of you has life insurance policies?
| 1 Respondent only
| 2 Spouse / partner only
| 3 Both
|
ENDIF
```

IF respondent only or both respondent and partner/spouse have life insurance policies or if was not asked IaLiW: IaLiW = 1 OR 3 OR

IaLiW =

EMPTY

```
|
| IaLiYA*
| How much would your dependants get from your life insurance
| policy
| or policies if you died?
| Range: 0..9999997
|
| CHECK: IF would get more than £800000 from life insurance
| policies:
| | IaLiYA > 800000, INTERVIEWER: "Are you sure? ^Response at IaLiYA
| seems | | high - please check."
```

```
|
| IF doesn't know or refuses to give amount from life insurance
| policies: | | IaLiYA = DK OR IaLiYA = RF
```

```
|
| Ialiyab*
| Would they get...
| Brackets: (20000, 50000, 100000, 400000)
|
ENDIF
```

ENDIF

IF only spouse/partner or both respondent and partner/spouse have life insurance policies: IaLiW = 2 OR 3

```
|
| IaLipA*
| How much would ^husband/wife/partner's dependants get from
| (his/her)
| life insurance policy or policies if (he/she) died?
| Range: 0..9999997
```

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```
| |
| | CHECK: IF would get more than £800000 from life insurance
policies:
| | IaLipA > 800000, INTERVIEWER: "Are you sure? ^Response at IaLipA
seems | | high - please check."
| |
| | IF doesn't know or refuses to give amount from life insurance
policies: | | IaLipA = DK OR IaLipA = RF
| |
| | Ialipab*
| | Would they get...
| | Brackets: (20000, 50000, 100000, 400000)
| |
| | ENDIF
| |
| | ENDIF
| |
| | IF both respondent and their partner/spouse have life insurance
policies: | | IaLiW = 3, ^litxt = your and husband/wife/partner's.
| | ELSEIF only respondent's spouse/partner has a life insurance
policy:
| | IaLiW = 2, ^litxt = husband/wife/partner`s.
| | ELSE, ^litxt = your.
| |
| | IaSC*
| | Do any of ^litxt life insurance policy or policies have a savings
component?
| | THAT IS THE VALUE OF THE FUND WILL BE PAID AT SOME POINT IN THE
FUTURE
| | 1 Yes
| | 2 No
| |
| | IF life insurance policy has a savings component: IaSC = 1
| |
| | IaSCA*
| | About how much in total will (this/these) savings component(s)
yield
| | when (it/they) mature(s)?
| | Range: 0..9999997
| |
| | CHECK: IF it will yield more than £500000: IaSCA > 500000,
INTERVIEWER: | | "Are you sure? ^Response at IaSCA seems high -
please check."
| |
| | IF doesn't know or refuses to give amount of savings component:
IaSCA = | | DK OR IaSCA = RF
| |
| | IaSCAb*
| | Will (this/these) yield...
| | Brackets: (10000, 25000, 50000, 250000)
| |
| | ENDIF
| |
| | ENDIF
| |
| | ENDIF
| |
| | IF has some savings or investments: IaSI = RESPONSE AND IaSI <> 96
| |
| | IADoc*
```

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| INTERVIEWER: CODE WHETHER RESPONDENT CONSULTED DOCUMENTS WHEN
ANSWERING

| THE FINANCIAL ASSETS QUESTIONS

- | 1 Respondent consulted documents frequently
- | 2 Respondent consulted documents occasionally
- | 3 Respondent did not consult documents

| **IAIntA***

| INTERVIEWER: HOW ACCURATE DO YOU THINK THE ANSWERS GIVEN BY THE
RESPONDENT WERE?

- | 1 Very accurate
- | 2 Fairly accurate
- | 3 Not very accurate
- | 4 Not at all accurate

|
ENDIF

NEW BLOCK - IAD

Time at start of real assets section (set by Iaprop)
TIME

Iaprop*

SHOW CARD CC

Which, if any, of these assets do ^you/you or your
husband/wife/partner have?

PROBE: What others?

CODE ALL THAT APPLY

- 1 Houses, flats or holiday homes, including timeshares (not
including
this home)
- 2 Farm or Business Property (such as a shop, warehouse or garage)
- 3 Other land
- 4 Money owed to you by others
- 5 A trust
- 6 A covenant or inheritance
- 95 Other assets (including works of art or collectibles such as
antiques or jewellery)
- 96 None of these [Exclusive code]

IF has houses, flats or holiday homes: Iaprop = 1

| **IaHome***

| If you chose to sell your house or holiday home and then paid off
any

| debts on it, about how much would ^you/you and your
husband/wife/partner | get?

| Range: 0..9999997

| CHECK: IF would get more than £500000 from sale of house or holiday
home: IaHome > 500000, INTERVIEWER: "Are you sure? ^Response at
IaHome

| seems high - please check."

| IF doesn't know or refuses to give amount from sale of house or
holiday

| home: IaHome = DK OR IaHome = RF

| **IaHomeb***

| Would ^you/you and your husband/wife/partner get...

| Brackets: (10000, 50000, 100000, 250000)

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```
|
|
| ENDIF
|
| Iair*
| Did ^you/you and your husband/wife/partner receive any income or
rent
| from that property in the last year?
| 1 Yes
| 2 No
|
| IF received income or rent from property in the last year: Iair = 1
|
| Iaira*
| How much income or rent did ^you/you and your
husband/wife/partner
| receive from that property in the last year, after any expenses
and
| taxes?
| Range: 0..999997
|
| CHECK: IF received more than £100000 from the property last year:
Iaira
| > 100000, INTERVIEWER: "Are you sure? ^Response at Iaira seems
high -
| please check."
|
| IF doesn't know or refuses to give amount from property last
year:
| Iaira = DK OR Iaira = RF
|
| IaIRB*
| Did ^you/you and your husband/wife/partner receive...
| Brackets: (1500, 4000, 7500, 50000)
|
| ENDIF
|
| ENDIF
|
| ENDIF
|
| IF has Farm or Business property: Iaprop = 2
|
| Iafbpb*
| If you sold your Farm or Business property and then paid off any
debts on | it, about how much would ^you/you and your
husband/wife/partner get?
| Range: 0..9999997
|
| CHECK: IF would receive more than £1000000 from sale of farm or
business
| property: Iafbpb > 1000000, INTERVIEWER: "Are you sure? ^Response
at
| Iafbpb seems high - please check."
|
| IF doesn't know or refuses to give amount would receive from sale
of farm | or business property: Iafbpb = DK OR Iafbpb = RF
|
| Iafbpb*
| Would ^you/you and your husband/wife/partner get...
| Brackets: (10000, 50000, 100000, 500000)
|
|
```

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```
| ENDIF
|
| Iafbpr*
| Did ^you/you and your husband/wife/partner receive any income or
rent
| from that property in the last year?
| 1 Yes
| 2 No
|
| IF received income or rent from property in the last year: Iafbpr =
1
|
| IafBA*
| How much income or rent did ^you/you and your
husband/wife/partner
| receive from that property in the last year, after any expenses
and
| taxes?
| Range: 0..999997
|
| CHECK: IF received more than £100000 income or rent from farm or
| business property: IafBA > 100000, INTERVIEWER: "Are you sure?
| ^Response at IafBA seems high - please check."
|
| IF doesn't know or refuses to give amount of income or rent from
farm
| or business property: IafBA = DK OR IafBA = RF
|
| Iafbab*
| Did ^you/you and your husband/wife/partner receive...
| Brackets: (1500, 4000, 7500, 50000)
|
| ENDIF
|
| ENDIF
|
| ENDIF
|
| IF has other land or money owed by others or trust or covenant or
inheritance or other assets: Iaprop = 3, 4, 5, 6 OR 95
|
| Repeat IaOasA to IaOasAb for each asset mentioned at Iaprop
|
| IaOasA*
| How much is ^asset worth?
| Range: 0..9999997
|
| CHECK: IF asset is worth more than £200000: IaOasA > 200000,
INTERVIEWER:
| "Are you sure? ^Response at IaOasA seems high - please check."
|
| IF doesn't know or refuses to give amount of ^asset: IaOasA = DK OR
IaOasA = RF
|
| IaOasAb*
| Is it worth...
| Brackets: (5000, 7500, 20000, 100000)
|
| ENDIF
```

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ENDIF

NEW BLOCK - IAE

Time at start at start of other income and debts section (set by
Iaregp)
TIME

Iaregp*

Apart from anything you have already told me about, did you receive
any regular payments from people not living here in the past year
(that is since ^date one year ago)?

- 1 Yes
- 2 No

*IF received regular payments from people not living in the household
in past year: Iaregp = 1*

Iapay to IaOthP should be repeated for up to 4 payments.

Iapay*

Thinking about your ^First/second/third/next payment who was it
from?

- 1 Husband/Wife
- 2 Ex-husband/wife/partner
- 3 Son/Daughter
- 4 Son/daughter-in-law
- 5 Parent
- 6 Parent-in-law
- 7 Brother/Sister
- 8 Brother/sister-in-law
- 9 Grandchild
- 10 Other relative
- 11 Other non-relative
- 12 Local Authority
- 13 Publisher

Iapayr*

What was the reason for this payment?

CODE ONE ONLY

- 1 Financial support for children
- 2 Household bills/expenses
- 3 Spending money/allowance
- 4 Loan repayment
- 5 Maintenance or alimony
- 6 Royalties
- 95 Other (specify)

IF other reason for payment: Iapayr = 95

Iapayo*

ENTER OTHER REASON

STRING: up to 60 Characters

ENDIF

Iarego*

What period did your usual payments cover?

- 1 One week
- 2 Two weeks
- 3 Three weeks

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```
4 Four weeks
5 Calendar month
7 Two Calendar months
8 Eight times a year
9 Nine times a year
10 Ten times a year
13 Three months/13 weeks
26 Six months/26 weeks
52 One Year/12 months/52 weeks
90 Less than one week
95 One off/lump sum
96 None of these [EXPLAIN IN A NOTE]

IF valid response regarding period or payment: Iarego = RESPONSE
|
| Iaregm*
| And about how much did you usually receive?
| Range: 0..999997
|
| CHECK: IF received more than £4000 per week OR more than £8000
every
| | two weeks OR more than 16000 per month OR more than £200000 per
year:
| | (Iaregm = RESPONSE AND Iaregm <> 999997) AND (Iarego = 1 AND
Iaregm >
| | 4000) OR (Iarego = 2 AND Iaregm > 8000) OR (Iarego = 4, 5 AND
Iaregm > | | 16000) OR (Iarego = 3, 7.. 26, 52, 90, 95 AND Iaregm >
200000),
| | INTERVIEWER: "Are you sure? ^Response at Iaregm seems high -
please
| | check."
|
| ENDIF

IF doesn't know OR refuses to give amount or frequency of payments:
(Iarego = DK OR Iarego = RF) OR (Iaregm = DK OR Iaregm = RF)
|
| IF receives payment one a week: Iarego = 1
|
| Iaregmwb*
| Did you usually receive...
| Brackets: (25, 50, 100, 2000)
|
| ELSEIF receives payment every two weeks: Iarego = 2
|
| Iaregmfb*
| Did you usually receive...
| Brackets: (50, 100, 200, 4000)
|
| ELSEIF receives payment every four weeks or one month: Iarego = 4
OR 5
|
| Iaregmmb*
| Did you usually receive...
| Brackets: (100, 200, 400, 8000)
|
| ELSEIF receives payment once a year or in a lump sum: Iarego = 52
OR 95
|
| Iaregmyb*
| Did you usually receive...
```

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```
| | Brackets: (1250, 2500, 5000, 100000)
| |
| | ELSE
| |
| | Iaregmob*
| | Did you usually receive in a month...
| | Brackets: (100, 200, 400, 8000)
| |
| | ENDIF
|
| ENDIF
|
| IaOthP*
| Did you receive any other regular payments from people not living
| here in the past year?
| 1 Yes
| 2 No
|
| ENDIF
|
| IF answering as part of a couple: IAAsk = 1
|
| Iapar*
| Apart from anything you have already told me about, did
| ^husband/wife/partner receive any regular payments from people not
| living | here in the past year (that is since ^date one year ago)?
| 1 Yes
| 2 No
|
| IF ^husband/wife/partner received other regular payments from
| people not | living here in the past year: Iapar = 1
|
| REPEAT QUESTIONS IaPS TO IaMrP for up to 4 PAYMENTS
|
| IaPS*
| Thinking about ^husband/wife/partner's ^First/second/third/next
| payment
| who was it from?
| 1 Husband/Wife
| 2 Ex-husband/wife/partner
| 3 Son/Daughter
| 4 Son/daughter-in-law
| 5 Parent
| 6 Parent-in-law
| 7 Brother/Sister
| 8 Brother/sister-in-law
| 9 Grandchild
| 10 Other relative
| 11 Other non-relative
| 12 Local Authority
| 13 Publisher
|
| IaPR*
| What was the reason for this payment?
| CODE ONE ONLY
| 1 Financial support for children
| 2 Household bills/expenses
| 3 Spending money/allowance
| 4 Loan repayment
| 5 Maintenance or alimony
| 6 Royalties
```

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```
95 Other (specify)
|
| IF other reason for the payment: IapR = 95
|
| Iaparo*
| ENTER OTHER REASON
| Text: up to 60 characters
|
| ENDIF
|
| Iapf*
| What period did ^husband/wife/partner's usual payments cover?
| 1 One week
| 2 Two weeks
| 3 Three weeks
| 4 Four weeks
| 5 Calendar month
| 7 Two Calendar months
| 8 Eight times a year
| 9 Nine times a year
| 10 Ten times a year
| 13 Three months/13 weeks
| 26 Six months/26 weeks
| 52 One Year/12 months/52 weeks
| 90 Less than one week
| 95 One off/lump sum
| 96 None of these [EXPLAIN IN A NOTE]
|
| IF valid response at Iapf: Iapf = RESPONSE
|
| Iapam*
| And about how much did ^husband/wife/partner usually receive?
| Range: 0..999997
|
| ENDIF
|
| IF doesn't know or refuses to give amount or frequency of payment:
| (Iapf = DK OR Iapf = RF) OR (Iapam = DK OR Iapam = RF)
|
| IF receives payment once a week: Iapf = 1
|
| Iapwb*
| Did ^husband/wife/partner usually receive...
| Brackets: (25, 50, 100, 2000)
|
| ELSEIF receives payment every two weeks: Iapf = 2
|
| Iapfb*
| Did ^husband/wife/partner usually receive...
| Brackets: (50, 100, 200, 4000)
|
| ELSEIF receives payment every four weeks or one month: Iapf = 4
or 5
|
| Iapmb*
| Did ^husband/wife/partner usually receive...
| Brackets: (100, 200, 400,8000)
|
| ELSEIF receives payment once a year or in a lump sum: Iapf = 52
or 95
|
|
```

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```
| | | Iapyb*
| | | Did ^husband/wife/partner usually receive...
| | | Brackets: (1250, 2500, 5000, 100000)
| | |
| | | ELSE
| | |
| | | Iapob*
| | | Did ^husband/wife/partner usually receive in a month...
| | | Brackets: (100, 200, 400, 8000)
| | |
| | | ENDIF
| |
| | ENDIF
| |
| | IaMrP*
| | Did ^husband/wife/partner receive any other regular payments from
| | people not living here in the past year?
| | 1 Yes
| | 2 No
| |
| | ENDIF

Iapk
SHOW CARD DD
Which, if any, of these payments and payments in kind have ^you/you
or your husband/wife/partner received in the last year (that is since
^date a year ago)?
PROBE: What others?
CODE ALL THAT APPLY
1 Life insurance policy
2 Lump sum pension pay-out
3 Personal Accident plan
4 Other Insurance Payment
5 Redundancy payment
6 Inheritance or bequest (inc. inherited property)
7 Win(s) on the football pools, national lottery or other form of
gambling
95 Other payment (SPECIFY)
96 None of these [Exclusive code]

IF received other payments in kind: Iapk = 95
|
| Iapko
| INTERVIEWER: WRITE IN SOURCE OF OTHER PAYMENT
| Text: up to 20
|
| ENDIF

IF received other payments in kind: Iapk = RESPONSE AND Iapk <> 96
|
| REPEAT Iapkm FOR EACH OF THE PAYMENTS MENTIONED AT Iapk
|
| Iapkm*
| How much in total was ^payment?
| Range:0..999997
|
| IF does not know or refuses to give amount of payment: Iapkm = DK
OR
| Iapkm = RF
|
| IaPkmb*
```

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```
| | Did ^you/you or your husband/wife/partner receive...
| | Brackets: (2500, 5000, 15000, 50000)
| |
| | ENDIF
|
ENDIF
```

Iadebt*

I would like to ask you about any other financial commitments
^you/you or your husband/wife/partner may have apart from mortgages
or housing related loans.

Do ^you/you or your husband/wife/partner currently owe any money on
credit or store cards?

- 1 Yes
- 2 No

IF currently owes money on credit or store cards: Iadebt = 1

Iadebm*

How much was the outstanding balance on these cards after the last
monthly payment was made?

Range: 0..99997

CHECK: IF owes more than £50000 on credit or store cards: Iadebm >
50000, | INTERVIEWER: "Are you sure? ^Response at Iadebm seems high -
please
| check."

IF does not know or refuses to give amount that owes: Iadebm = DK
OR

Iadebm = RF

Iadebmb*

Was it ...

Brackets: (1000, 2000, 5000, 25000)

ENDIF

ENDIF

Iaowe*

Do ^you/you or your husband/wife/partner currently owe any money to
friends, relatives, or other private individuals?

- 1 Yes
- 2 No

IF owes money to friends, relatives, or other individuals: Iaowe = 1

Iaowem*

How much do ^you/you and your husband/wife/partner owe?

Range: 0..99997

CHECK: IF owes more than £50000 to friends, relatives or others:
Iaowem > | 50000, INTERVIEWER: "Are you sure? ^Response at Iaowem
seems high -
| please check."

*IF does not know or refuses to give amount owes to friends,
relatives or | others: Iaowem = DK OR Iaowem = RF*

Iaowetb*

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```
| | Do ^you/you and your husband/wife/partner owe...
| | Brackets: (1000, 2000, 5000, 25000)
| |
| | ENDIF
| |
| | IaRegR*
| | Do ^you/you and your husband/wife/partner make regular repayments
| | on these loans?
| | 1 Yes
| | 2 No
| |
| | IF makes regular payments on the loans: IaRegR = 1
| |
| | IaRegRP*
| | What period do these repayments cover?
| | 1 One week
| | 2 Two weeks
| | 3 Three weeks
| | 4 Four weeks
| | 5 Calendar month
| | 7 Two Calendar months
| | 8 Eight times a year
| | 9 Nine times a year
| | 10 Ten times a year
| | 13 Three months/13 weeks
| | 26 Six months/26 weeks
| | 52 One Year/12 months/52 weeks
| | 90 Less than one week
| | 95 One off/lump sum
| | 96 None of these [EXPLAIN IN A NOTE]
| |
| | IF valid response: IaRegRP = RESPONSE
| |
| | Iarep*
| | How much are your usual repayments?
| | Range: 0..9997
| |
| | CHECK: IF repayments are more than £300 per week OR more than
| | £600
| | per fortnight OR more than £1200 per month OR more than £150000
| | per
| | year: Iarep = RESPONSE AND (IaRegRP = 1 AND Iarep > 300) OR
| | (IaRegRP
| | = 2 AND Iarep > 600) OR (IaRegRP = 4, 5 AND (Iarep > 1200) OR
| | (IaRegRP =3, 7..26, 52, 90, 95 AND Iarep > 15000), INTERVIEWER:
| | "Are you sure? ^Response at Iarep seems high - please check.
| |
| | ENDIF
| |
| | IF does not know or refuses to give amount or frequency of
| | repayments: | | (IaRegRP = DK OR IaRegRP = RF) OR (Iarep = DK OR
| | Iarep = RF)
| |
| | IF repayments are once a week: IaRegRP = 1
| |
| | IaRPWb*
| | Are they...
| | Brackets: (10, 20, 50, 150)
| |
| | ELSEIF repayments are every two weeks: IaRegRP = 2
```

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```
| | | | IaRPfb*
| | | | Are they...
| | | | Brackets: (20, 40, 100, 300)
| | | | ELSEIF repayments are every four weeks or one month: IaRegRP =
4 OR
| | | | IaRegRP =5
| | | | IaRPmb*
| | | | Are they...
| | | | Brackets: (40, 80, 200, 600)
| | | | ELSEIF repayments are once a year or in a lump sum: IaRegRP =
52 OR
| | | | IaRegRP = 95
| | | | IaRPyb*
| | | | Are they...
| | | | Brackets: (500, 1000, 2500, 7500)
| | | | ELSE
| | | | IaRPob*
| | | | Are they in a month...
| | | | Brackets: (40, 80, 200, 600)
| | | | ENDIF
| | | | ENDIF
| | | | ENDIF
| | | | ENDIF
| | | | ENDIF
```

Ialoan*

SHOW CARD EE

On which, if any, of these do ^you/you or your husband/wife/partner currently owe money?

PROBE: What others?

CODE ALL THAT APPLY

- 1 Hire purchase agreements
- 2 Personal loans (from bank, building society or other financial institution)
- 3 Overdraft
- 4 Catalogue or mail order purchase agreements
- 5 DSS Social fund loan
- 6 Loan from a money lender or `tally man`
- 96 None of these [Exclusive code]

IF currently owes money on any of these loans: Ialoan = RESPONSE AND Ialoan <> 96

Ialoam*

How much in total do ^you/you and your husband/wife/partner owe on these | loans?

Range: 0..99997

CHECK: IF owe more than £50000 on these loans: Ialoam > 50000,
INTERVIEWER: "Are you sure? ^Response at Ialoam seems high - please check."

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```
| IF does not know or refuses to give amount owed on loans: Ialoam =
DK OR
| Ialoam = RF
|
| Ialoamb
| Do ^you/you and your husband/wife/partner owe...
| Brackets: (1000, 2000, 5000, 25000)
|
| ENDIF
|
| IF loan type is hire purchase agreement OR IF have any loan other
than
| overdraft: Ialoan = 1 OR Ialoan <> 3
|
| IalreP
| What period do ^your and your husband's/wife's/partner's usual
repayments on these loans cover?
| IF DOESN'T MAKE REPAYMENTS, CODE 97
| 1 One week
| 2 Two weeks
| 3 Three weeks
| 4 Four weeks
| 5 Calendar month
| 7 Two Calendar months
| 8 Eight times a year
| 9 Nine times a year
| 10 Ten times a year
| 13 Three months/13 weeks
| 26 Six months/26 weeks
| 52 One Year/12 months/52 weeks
| 90 Less than one week
| 95 One off/lump sum
| 96 None of these [EXPLAIN IN A NOTE]
| 97 Doesn't make repayments
|
| IF valid response regarding period of loan repayment: IalreP =
RESPONSE | | AND IalreP <> 97
|
| Ialre*
| How much are your usual repayments on these loans?
| Range: 0..99997
|
| CHECK: IF repayments are more than £300 per week OR more than
£600
| | every two weeks, more than £1200 per month or more than £15000
per
| | | year: Ialre = RESPONSE AND (IalreP = 1 AND Ialre > 300) OR
(IalreP = | | | 2 AND Ialre > 600) OR (IalreP = 4, AND Ialre > 1200)
OR (IalreP = 3, | | | 7..26, 52, 90..92 AND (Ialre > 15000),
INTERVIEWER: "Are you sure?
| | | ^Response at Ialre seems high - please check."
|
| ENDIF
|
| IF doesn't know or refuses to give amount or frequency of
repayments:
| (IalreP = DK OR IalreP = RF) OR (Ialre = DK OR Ialre = RF)
|
| IF repayments are once a week: IalreP = 1
|
| Ialrpwb*
```

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```
| | | Are your usual repayments on these loans...
| | | Brackets: (10, 20, 50, 150)
| | | ELSEIF repayments are every two weeks: IalreP = 2
| | | Ialrpfb*
| | | Are your usual repayments on these loans...
| | | Brackets (20, 40, 100, 300)
| | | ELSEIF repayments are every four weeks or one month: IalreP = 4
Or | | | IalreP = 5
| | | Ialrpmb*
| | | Are your usual repayments on these loans...
| | | Brackets: (40, 80, 200, 600)
| | | ELSEIF repayments are once a year or in a lump sum: IalreP = 52
Or | | | IalreP = 95
| | | Ialrpyb*
| | | Are your usual repayments on these loans...
| | | Brackets: (500, 1000, 2500, 7500)
| | | ELSE
| | | Ialrpob*
| | | Are your usual repayments on these loans per month...
| | | Brackets: (40, 80, 200, 600)
| | | ENDIF
| | | ENDIF
| | | ENDIF
ENDIF
```

NEW BLOCK

IF person is part of couple and each member of couple is answering IA separately: Icouplen > 0 AND ICaskIA = Yes

```
| | IaJnt*
| | Can I just check, do you have any savings, investments, property or
| | other assets that are held jointly with ^your husband/wife/partner?
| | 1 Yes
| | 2 No
| | If has assets that are held jointly: IaJnt = 1
| | IaAm*
| | About how much would your personal share amount to, minus your
| | share of any joint debts ^you and your husband/wife/partner might
| | have?
| | Range: 0..999997
| | CHECK: IF has more than £100000 in savings, investments, property
or
```

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```
| | other assets: IaAm > 100000, INTERVIEWER: "Are you sure?  
^Response at  
| | IaAm seems high - please check."  
| |  
| | IF doesn't know or refuses to give amount of savings,  
investments,  
| | property or other assets: IaAm = DK OR IaAm = RF  
| |  
| | IaAmB*  
| | Would it amount to..  
| | Brackets: (1000, 2500, 10000, 50000)  
| |  
| | ENDIF  
| |  
| | ENDIF  
| |  
ENDIF
```

IF more than one person in HH are eligible to answer IA, then only one should answer IaFcon to IaFinw (first one to answer IA)

Iafcon*

SHOW CARD FF

Which of the phrases on the card best describes how ^you/you and your husband/wife/partner are getting along financially these days?

- 1 manage very well
- 2 manage quite well
- 3 get by alright
- 4 don't manage very well
- 5 have some financial difficulties
- 6 have severe financial difficulties

IF person is married or cohabitating: Icouple = married OR Icouple = cohabit

Iaorgf

SHOW CARD GG

People organise their family finances in different ways.

Which of the methods on this card comes closest to the way you organise yours.

It doesn't have to fit exactly - just choose the nearest one.

You can just tell me the number which applies.

CODE ONE ONLY

- 1 I look after all the household money except my partner's personal spending money
- 2 My partner looks after all the household money except my personal spending money
- 3 I am given a housekeeping allowance. My partner looks after the rest of the money
- 4 My partner is given a housekeeping allowance. I look after the rest of the money
- 5 We share and manage our household finances jointly
- 6 We keep our finances completely separate"
- 7 Some other arrangement

IF uses some other arrangement: Iaorgf = 7

Iaorgd

PLEASE RECORD DETAILS

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```
| | Text: up to 60
| |
| | ENDIF
| |
| | Iafind
| | In your household who has the final say in big financial decisions?
| | DO NOT PROMPT
| | CODE ONE ONLY
| | 1 Respondent
| | 2 Partner
| | 3 Both have equal say
| | 4 Other
| |
| | IF other people have a say in big financial decisions: Iafind = 4
| |
| | Iafinw
| | WRITE IN
| | Text: up to 20
| |
| | ENDIF
| |
| | ENDIF
| |
| | NEW BLOCK
| |
| | IF more than one person in HH are eligible to answer IA, then only
| | one should answer IaPayW to IaOmbb (first one to answer IA)
| |
| | AskRec
| | Derived - Ask IAREc?
| | 1 Yes
| | 2 No
| | IF there are any household members aged 16 or over who are not
| | eligible for interview, AskRec = 1
| |
| | IF there are any household members aged 16 or over who are not
| | eligible for interview
| |
| | REPEAT IaPayw to Iaombb for all people in household aged 16 or over
| | who
| | are not eligible for interview.
| |
| | Iapayw*
| | During the last year did ^name do any work for pay?
| | 1 Yes
| | 2 No
| |
| | IF did work for pay last year : Iapayw = 1
| |
| | Iaearn*
| | About how much money did ^name earn from all jobs in the last
| | year,
| | before any tax or other deductions?
| | Range: 0..999997
| |
| | CHECK: IF earned more than £200000 in the last year: Iaearn >
| | 200000,
| | INTERVIEWER: Are you sure? ^Response at Iaearn seems high -
| | please
| | check.
| |
```

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```
| | IF doesn't know or refuses to give amount of earnings last year:
Iaearn
| | = DK OR Iaearn = RF
| |
| | Iaearnb*
| | Did ^name earn...
| | Brackets: (10000, 20000, 35000, 100000)
| |
| | ENDIF
| |
| | ENDIF
ENDIF
```

IF there are any household members aged 16 or over who are not eligible for interview: AskRec = 1

```
| | Iarec*
| | Not including any job income, about how much in total did ^name
receive
| | in the last year from benefits, pensions, interest, gifts or
anything
| | else (before any taxes or deductions)?
| | Range: 0..999997
| |
| | CHECK: IF received more than £100000 from benefits, pensions,
interest or
| | gifts in the last year: Iarec = RESPONSE AND Iarec > 100000,
INTERVIEWER: | "Are you sure? ^Response at Iarec seems high - please
check."
```

IF doesn't know or refuses to give amount received: Iarec = DK OR Iarec

```
= RF
| |
| | Iarecb*
| | Did ^name receive
| | Brackets: (250, 500, 1000, 5000)
| |
| | ENDIF
```

```
Iaom*
Does ^name have more than £2,500 total in bank accounts, other
financial assets, vehicles, property, or other investments?
1 Yes
2 No
```

IF has more than £2,500 total in bank accounts, other financial assets, vehicles, property, or other investments: Iaom = 1

```
| | Iaomm*
| | About how much altogether would that amount to, minus any debts
he/she/they might have?
| | Range: 0..999997
| |
| | CHECK: IF assets would amount to more than £300000: Iaomm >
300000,
| | INTERVIEWER: "Are you sure? ^Response at Iaomm seems high -
please
| | check.
```

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```
| ENDIF  
|  
| IF doesn't know or refuses to give amount of assets: Iaomm = DK OR  
| Iaomm = RF  
|  
| Iaommb*  
| Brackets: (1000, 5000, 20000, 150000)  
|  
| ENDIF  
|  
ENDIF
```