### Section 11A – HUSBAND EMPLOYED: FUTURE PENSIONS FROM CURRENT EMPLOYER

**CHECK ITEM J-1**

Refer to item R13 on the Information Sheet. Is the respondent’s husband currently employed?

| Box 1 marked in R13, husband in Labor Force Group A – ASK 126a | ☑️ |
| ☐ All others – SKIP to 139a, page 124 |

#### 126a. (As mentioned before,) Many employers have pension or retirement plans, and some employers provide tax-deferred plans such as thrift, savings, 401Ks, profit-sharing, or stock ownership plans. (Pause)

Is your husband included in any pension or retirement plans, or in any tax-deferred savings plans on his current job? Do NOT include Social Security, IRA, or Keogh plans.

| ☑ Yes – SKIP to 127a | ☑️ |
| ☐ No | ☐ |
| ☑ Don’t know – ASK 126b | ☐ |

#### b. Will your husband be covered by such a plan if he continues working for this employer?

| ☑ Yes | ☑️ |
| ☐ No | ☐ |
| ☐ Don’t know – SKIP to 139a, page 124 | ☑ |

#### 127a. We would like to ask some questions about each pension or retirement plan offered by your husband’s current employer and in which he is participating. Some employers have several different plans for which an employee may be eligible. Does your husband’s employer have more than one plan that your husband could participate in?

| ☑ Yes – ASK 127b | ☑️ |
| ☐ No – SKIP to 126a, page 112 and read “this plan” phrase | ☑ |
| ☑ Don’t know – SKIP to 127c | ☐ |

#### b. How many plans does your husband’s employer have for which he is eligible?

| ☑ | ☑ |
| ☐ | ☐ |
| ☑ Don’t know | ☑ |

#### c. How many (of these) plans is your husband participating in?

| ☑ | ☑ |
| ☐ | ☐ |
| ☑ Don’t know – GO to Check Item J-2, 112 | ☑ |

---

**NOTES**
### Section 11A – HUSBAND EMPLOYED: FUTURE PENSIONS FROM CURRENT EMPLOYER – Continued

**CHECK ITEM J-2**

Refer to item 127c, page 111.

128a. (We would like to ask about (this plan)/each plan separately, beginning with the most important plan.) How much do you know about this (1st, 2nd, 3rd, 4th) pension plan? A lot, something, or very little?

<table>
<thead>
<tr>
<th>POM 4</th>
<th>FIRST PENSION PLAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>2438</td>
<td>1. A lot</td>
</tr>
<tr>
<td></td>
<td>2. Something</td>
</tr>
<tr>
<td></td>
<td>3. Very little/Nothing</td>
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</table>

<table>
<thead>
<tr>
<th>POM 3</th>
<th>SECOND PENSION PLAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>2523</td>
<td>1. A lot</td>
</tr>
<tr>
<td></td>
<td>2. Something</td>
</tr>
<tr>
<td></td>
<td>3. Very little/Nothing</td>
</tr>
</tbody>
</table>

b. How many years has he been included in this plan? Please include only the years that count or will count toward his pension or retirement benefits.

<table>
<thead>
<tr>
<th></th>
<th>Number of years</th>
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<tbody>
<tr>
<td>2437</td>
<td></td>
</tr>
<tr>
<td>2438</td>
<td>Don't know</td>
</tr>
</tbody>
</table>

b. How many years has he been included in this plan? Please include only the years that count or will count toward his pension or retirement benefits.

<table>
<thead>
<tr>
<th></th>
<th>Number of years</th>
</tr>
</thead>
<tbody>
<tr>
<td>2534</td>
<td></td>
</tr>
<tr>
<td>2535</td>
<td>Don't know</td>
</tr>
</tbody>
</table>

SHOW FLASHCARD H

**c. (As mentioned before.)** In the most common pension or retirement plan, Type A, the amount of the benefit is usually based on a FORMULA involving age, years of service, and salary. In other plans, Type B, money is accumulated in a type of SAVINGS ACCOUNT for your husband until his retirement. Is this plan a "formula" plan, Type A, or a "savings account" plan, Type B?

<table>
<thead>
<tr>
<th></th>
<th>Type A (formula) – ASK 128d</th>
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</thead>
<tbody>
<tr>
<td>2439</td>
<td>1. Type A (formula) – ASK 128d</td>
</tr>
<tr>
<td></td>
<td>2. Type B (savings) – SKIP to 131, page 116</td>
</tr>
<tr>
<td></td>
<td>3. Both – SKIP to 129a</td>
</tr>
<tr>
<td></td>
<td>4. Don't know – ASK 128d</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
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</thead>
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<td>2526</td>
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<tr>
<td></td>
<td>2. Type B (savings) – SKIP to 131, page 116</td>
</tr>
<tr>
<td></td>
<td>3. Both – SKIP to 129a</td>
</tr>
<tr>
<td></td>
<td>4. Don't know – ASK 128d</td>
</tr>
</tbody>
</table>

d. How much does your husband currently contribute to this plan?

<table>
<thead>
<tr>
<th></th>
<th>Percent of pay</th>
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<tbody>
<tr>
<td>2440</td>
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<tr>
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<table>
<thead>
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<tbody>
<tr>
<td>2442</td>
<td>00</td>
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</tr>
<tr>
<td></td>
<td>Twice a month</td>
</tr>
<tr>
<td></td>
<td>Every month</td>
</tr>
<tr>
<td></td>
<td>Quarter</td>
</tr>
<tr>
<td></td>
<td>Year</td>
</tr>
<tr>
<td></td>
<td>Other – Specify</td>
</tr>
</tbody>
</table>

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<tr>
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<tr>
<td>OR</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Week</th>
</tr>
</thead>
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<tr>
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<td>Biweekly (every two weeks)</td>
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<tr>
<td></td>
<td>Twice a month</td>
</tr>
<tr>
<td></td>
<td>Every month</td>
</tr>
<tr>
<td></td>
<td>Quarter</td>
</tr>
<tr>
<td></td>
<td>Year</td>
</tr>
<tr>
<td></td>
<td>Other – Specify</td>
</tr>
</tbody>
</table>

**129a. (As mentioned before.)** Most plans have a normal retirement age at which full benefits, sometimes called unreduced benefits, can be received. Some plans allow retirement at an earlier age, usually with reduced benefits but sometimes at full benefits. And in many plans normal retirement age depends on years of service. If your husband stays at this job, at what age will he be eligible to receive FULL benefits?

<table>
<thead>
<tr>
<th></th>
<th>Age – ASK 129b, page 114</th>
</tr>
</thead>
<tbody>
<tr>
<td>2444</td>
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</tr>
<tr>
<td>2445</td>
<td>1. Never – SKIP to 129f, page 114</td>
</tr>
<tr>
<td></td>
<td>2. Presently eligible – SKIP to 129e, page 114</td>
</tr>
<tr>
<td></td>
<td>3. Don't know – SKIP to 129e, page 114</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
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</thead>
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<tr>
<td>2532</td>
<td>1. Never – SKIP to 129f, page 114</td>
</tr>
<tr>
<td></td>
<td>2. Presently eligible – SKIP to 129e, page 114</td>
</tr>
<tr>
<td></td>
<td>3. Don't know – SKIP to 129e, page 114</td>
</tr>
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<td>PGM 4</td>
<td>THIRD PENSION PLAN</td>
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<tr>
<td>-------</td>
<td>--------------------</td>
</tr>
<tr>
<td>2610</td>
<td>□ A lot</td>
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<td></td>
<td>□ Something</td>
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<tr>
<td></td>
<td>□ Very little/Nothing</td>
</tr>
<tr>
<td>2611</td>
<td>□ Don’t know</td>
</tr>
<tr>
<td></td>
<td>□ Number of years</td>
</tr>
<tr>
<td>2612</td>
<td>□ Don’t know</td>
</tr>
<tr>
<td></td>
<td>□ Type A (formula) – ASK 128d</td>
</tr>
<tr>
<td></td>
<td>□ Type B (savings) – SKIP to 131, page 116</td>
</tr>
<tr>
<td></td>
<td>□ Both – SKIP to 129a</td>
</tr>
<tr>
<td></td>
<td>□ Don’t know – ASK 128d</td>
</tr>
<tr>
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<td></td>
<td>□ Percent of pay</td>
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<td></td>
<td>□ 00 per</td>
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<tr>
<td>2617</td>
<td>□ Week</td>
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<td></td>
<td>□ Biweekly (every two weeks)</td>
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<td></td>
<td>□ Twice a month</td>
</tr>
<tr>
<td></td>
<td>□ Month</td>
</tr>
<tr>
<td></td>
<td>□ Quarter</td>
</tr>
<tr>
<td></td>
<td>□ Year</td>
</tr>
<tr>
<td></td>
<td>□ Other – Specify</td>
</tr>
<tr>
<td>2618</td>
<td>□ Never – SKIP to 129f, page 114</td>
</tr>
<tr>
<td></td>
<td>□ Presently eligible – SKIP to 129c, page 114</td>
</tr>
<tr>
<td></td>
<td>□ Don’t know – SKIP to 129b, page 114</td>
</tr>
</tbody>
</table>

FORM LGT-3161 (7-20-92) Page 113
### Section 11A - HUSBAND EMPLOYED: FUTURE PENSIONS FROM CURRENT EMPLOYER - Continued

#### 129b. What do you expect your husband’s salary to be at that age? Please give us your best estimate.

<table>
<thead>
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<th>POM 4</th>
<th>FIRST PENSION PLAN</th>
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</thead>
<tbody>
<tr>
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<td>2447</td>
<td>[ ] Week</td>
</tr>
<tr>
<td>2448</td>
<td>[ ] Biweekly (every two weeks)</td>
</tr>
<tr>
<td>2449</td>
<td>[ ] Twice a month</td>
</tr>
<tr>
<td>2450</td>
<td>[ ] Month</td>
</tr>
<tr>
<td>2451</td>
<td>[ ] Quarter</td>
</tr>
<tr>
<td>2452</td>
<td>[ ] Year</td>
</tr>
<tr>
<td>2453</td>
<td>[ ] Other - Specify</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>POM 3</th>
<th>SECOND PENSION PLAN</th>
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</thead>
<tbody>
<tr>
<td>2532</td>
<td>$ (Dollars only)</td>
</tr>
<tr>
<td>2533</td>
<td>[ ] Week</td>
</tr>
<tr>
<td>2534</td>
<td>[ ] Biweekly (every two weeks)</td>
</tr>
<tr>
<td>2535</td>
<td>[ ] Twice a month</td>
</tr>
<tr>
<td>2536</td>
<td>[ ] Month</td>
</tr>
<tr>
<td>2537</td>
<td>[ ] Quarter</td>
</tr>
<tr>
<td>2538</td>
<td>[ ] Year</td>
</tr>
<tr>
<td>2539</td>
<td>[ ] Other - Specify</td>
</tr>
</tbody>
</table>

#### c. At what age did he become eligible?

| 2449 | Age - ASK 129d |
| 2450 | [ ] Don’t know - SKIP to 129e |
| 2451 | [ ] Don’t know - OR |

#### d. If he (starts/had started) to receive his full pension benefits at this earliest age, how much would he receive?

If don’t know ASK: What percentage of his pay would he receive if he (starts/had started) to receive his full pension benefits at this earliest age?

| 2452 | [ ] Don’t know |
| 2453 | $ (Dollars only) | 00 per |
| 2454 | [ ] Week |
| 2455 | [ ] Biweekly (every two weeks) |
| 2456 | [ ] Twice a month |
| 2457 | [ ] Month |
| 2458 | [ ] Quarter |
| 2459 | [ ] Year |
| 2460 | [ ] Other - Specify |

#### e. (Will/Would) these pension benefits be reduced once he (reaches/reached) age 65 or (becomes/became) eligible for social security benefits?

| 2452 | [ ] Yes |
| 2454 | [ ] No |
| 2456 | [ ] Don’t know - SKIP to 129g |

#### f. Will he ever be eligible to receive reduced benefits from this plan?

| 2454 | [ ] Yes - SKIP to 129a |
| 2456 | [ ] No |
| 2458 | [ ] Don’t know - SKIP to 129g |

#### g. If he (wishes/had wished), could he (have) retire(d) earlier and receive(d) reduced benefits from this plan at the time of his retirement?

| 2458 | [ ] Yes - ASK 130a |
| 2460 | [ ] No |
| 2462 | [ ] Don’t know - SKIP to 129g |

#### 130a. At what age will he first be eligible to receive REDUCED benefits?

| 2458 | Age - SKIP to 130c, page 116 |
| 2460 | [ ] Presently eligible - ASK 130b |
| 2462 | [ ] Don’t know - SKIP to 130d, page 116 |

#### b. At what age did he become eligible?

| 2458 | Age - ASK 130c, page 116 |
| 2460 | [ ] Don’t know - SKIP to 130d, page 116 |
| Section 11A – HUSBAND EMPLOYED: FUTURE PENSIONS FROM CURRENT EMPLOYER – Continued |
|---|---|---|---|---|
| **THIRD PENSION PLAN** | **FOURTH PENSION PLAN** | **NOTES** |
| 2620 | $ (Dollars only) | 00 per | 2707 | $ (Dollars only) | 00 per |
| 2623 | 2709 | 1. Don't know | 2710 | 1. Don't know |
| 2624 | Age – ASK 129d | 2711 | Age – ASK 129d |
| 2625 | 1. Don't know | 2712 | 1. Don't know |
| 2626 | 2. Percent of pay | 2713 | 2. Percent of pay |
| 2627 | OR | 2714 | OR |
| 2628 | $ (Dollars only) | 00 per | 2715 | $ (Dollars only) | 00 per |
| 2634 | Age – ASK 130c, page 116 | 2721 | Age – ASK 130c, page 116 |
| 2635 | Don't know – SKIP 130d, page 116 | 2722 | Don't know – SKIP 130d, page 116 |
### Section 11A – HUSBAND EMPLOYED: FUTURE PENSIONS FROM CURRENT EMPLOYER – Continued

<table>
<thead>
<tr>
<th>130c. If he (were to start/had started) to receive reduced benefits at this earliest age, how much would he receive?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FIRST PENSION PLAN</strong></td>
</tr>
<tr>
<td><strong>SECOND PENSION PLAN</strong></td>
</tr>
<tr>
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<tr>
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<tr>
<td>2559</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>d. (Will/Would) the amount that he (receives/received) eventually decrease as a result of social security benefits?</th>
</tr>
</thead>
<tbody>
<tr>
<td>2466</td>
</tr>
<tr>
<td>2467</td>
</tr>
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<tr>
<td>2555</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>e. Will this change take place automatically at age 62, automatically at age 65, whenever social security benefits begin, or at some other time?</th>
</tr>
</thead>
<tbody>
<tr>
<td>2467</td>
</tr>
<tr>
<td>2468</td>
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<tr>
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</table>

**CHECK ITEM J-3**

Refer to Item 128c, page 112.

**SHOW FLASHCARD!**

<table>
<thead>
<tr>
<th>131. Could you tell me a little more about your husband’s account plan? Is it a thrift or savings plan, a 401K, a profit-sharing plan, a stock-purchase plan, or what?</th>
</tr>
</thead>
<tbody>
<tr>
<td>2469</td>
</tr>
<tr>
<td>2470</td>
</tr>
<tr>
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</tr>
<tr>
<td>2549</td>
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<tr>
<td>2550</td>
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</table>

Mark (X) all that apply.

<table>
<thead>
<tr>
<th>132a. How much does YOUR HUSBAND’S EMPLOYER contribute to this plan?</th>
</tr>
</thead>
<tbody>
<tr>
<td>2474</td>
</tr>
<tr>
<td>2475</td>
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Mark (X) all that apply.
<table>
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<th>THIRD PENSION PLAN</th>
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<th>FOURTH PENSION PLAN</th>
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<td>Percent of pay</td>
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<td></td>
</tr>
<tr>
<td></td>
<td>OR</td>
<td>2724</td>
<td>OR</td>
<td></td>
</tr>
<tr>
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<td>2725</td>
<td>$ (Dollars only)</td>
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<td>□ Biweekly (every two weeks)</td>
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<td>□ Twice a month</td>
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<tr>
<td></td>
<td>□ Month</td>
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<td>□ Quarter</td>
<td>□ Quarter</td>
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<td>□ At age 62</td>
<td>2728</td>
<td>□ At age 62</td>
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<td>□ At age 65</td>
<td>□ At age 65</td>
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<td>□ Whenever social security benefits begin</td>
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<td>□ At some other time</td>
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<td>□ Box 4 marked in 128c – SKIP to 133a, page 118</td>
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<tr>
<td></td>
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<td>□ All others – SKIP to 134b, page 118</td>
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<tr>
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<td>2730</td>
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<td>2733</td>
<td>□ Stock purchase, Employee Stock Ownership Program (ESOP)</td>
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<tr>
<td>2649</td>
<td>Percent of pay</td>
<td>2736</td>
<td>Percent of pay</td>
<td></td>
</tr>
<tr>
<td>2650</td>
<td>□ Nothing</td>
<td>2737</td>
<td>□ Nothing</td>
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</tr>
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<td>□ Don't know</td>
<td>□ Don't know</td>
<td>□ Don't know</td>
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</tr>
<tr>
<td>2651</td>
<td>$ (Dollars only)</td>
<td>2738</td>
<td>$ (Dollars only)</td>
<td></td>
</tr>
<tr>
<td>2652</td>
<td>□ Week</td>
<td>2739</td>
<td>□ Week</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ Biweekly (every two weeks)</td>
<td>2740</td>
<td>□ Biweekly (every two weeks)</td>
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<tr>
<td></td>
<td>□ Twice a month</td>
<td>□ Twice a month</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ Month</td>
<td>□ Month</td>
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<tr>
<td></td>
<td>□ Quarter</td>
<td>□ Quarter</td>
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<td>□ Year</td>
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<td>6082</td>
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<td>PGM 3</td>
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</table>

FORM LOT:3161 (7-20-92)
### Section 11A – HUSBAND EMPLOYED: FUTURE PENSIONS FROM CURRENT EMPLOYER – Continued

#### 132b. How much does YOUR HUSBAND contribute to this plan?

<table>
<thead>
<tr>
<th>PGM 4</th>
<th>FIRST PENSION PLAN</th>
<th>PGM 4</th>
<th>SECOND PENSION PLAN</th>
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<tbody>
<tr>
<td>2479</td>
<td></td>
<td>2666</td>
<td></td>
</tr>
<tr>
<td>2480</td>
<td>□ Nothing</td>
<td>2667</td>
<td>□ Nothing</td>
</tr>
<tr>
<td></td>
<td>□ Don't know</td>
<td>2667</td>
<td>□ Don't know</td>
</tr>
<tr>
<td>2481</td>
<td>OR $ (Dollars only) per</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ Week</td>
<td>2568</td>
<td>$ (Dollars only)</td>
</tr>
<tr>
<td></td>
<td>□ Biweekly (every two weeks)</td>
<td>2569</td>
<td>□ Week</td>
</tr>
<tr>
<td></td>
<td>□ Twice a month</td>
<td>2569</td>
<td>□ Biweekly (every two weeks)</td>
</tr>
<tr>
<td></td>
<td>□ Month</td>
<td>2569</td>
<td>□ Twice a month</td>
</tr>
<tr>
<td></td>
<td>□ Quarter</td>
<td>2569</td>
<td>□ Month</td>
</tr>
<tr>
<td></td>
<td>□ Year</td>
<td>2569</td>
<td>□ Quarter</td>
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<tr>
<td></td>
<td>□ Other – Specify</td>
<td>2569</td>
<td>□ Year</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2569</td>
<td>□ Other – Specify</td>
</tr>
</tbody>
</table>

#### 133a. Roughly how much money is in your husband’s account at present? Include both your husband’s and your husband’s employer’s contributions and earnings.

<table>
<thead>
<tr>
<th>PGM 3</th>
<th></th>
<th>PGM 3</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>2483</td>
<td>$ (Dollars only) $00</td>
<td>2570</td>
<td>$ (Dollars only) $00</td>
</tr>
<tr>
<td>2484</td>
<td>□ Nothing</td>
<td>2571</td>
<td>□ Nothing</td>
</tr>
<tr>
<td></td>
<td>□ Don’t know</td>
<td>2571</td>
<td>□ Don’t know</td>
</tr>
</tbody>
</table>

#### b. Is your husband able to choose how the money in his account is invested?

|       | □ Yes                                | 2672  | □ Yes                                |
|       | □ No                                 | 2672  | □ No                                 |
|       | □ Don’t know                         | 2672  | □ Don’t know                         |

#### 134a. How is the money in this account invested? Is it mostly in stocks, mostly in interest-earning assets, is it split evenly between these, or what?

|       | □ Mostly (51%) or all stocks         | 2673  | □ Mostly (51%) or all stocks         |
|       | □ Mostly (51%) or all                | 2673  | □ Mostly (51%) or all                |
|       | interest-earning assets              | 2673  | interest-earning assets              |
|       | □ Split evenly between the two       | 2673  | □ Split evenly between the two       |
|       | □ Other – Specify                    | 2673  | □ Other – Specify                    |
|       | □ Don’t know                         | 2673  | □ Don’t know                         |

#### b. If your husband were to die before you, would you be able to receive regular monthly payments from this plan either now or in the future?

|       | □ Yes                                | 2674  | □ Yes                                |
|       | □ No                                 | 2674  | □ No                                 |
|       | □ Don’t know                         | 2674  | □ Don’t know                         |

#### 135a. At what age does your husband expect to leave this employer?

|       | __________ Age – ASK 135b             | 2675  | __________ Age – ASK 135b             |
|       | □ Don’t know                          | 2676  | □ Don’t know                          |
|       | □ Never plans to retire SKIkip to 135c | 2676  | □ Never plans to retire SKIkip to 135c |

#### b. If your husband leaves this employer at that age, at what age will he be eligible to receive a benefit from that plan?

|       | __________ Age – SKIkip to 135e, page 120 | 2677  | __________ Age – SKIkip to 135e, page 120 |
|       | □ Presently eligible – SKIkip to 135d   | 2678  | □ Presently eligible – SKIkip to 135d   |
|       | □ Never SKIkip to 136, page 120         | 2678  | □ Never SKIkip to 136, page 120         |

#### c. Is he eligible to retire now?

|       | □ Yes – ASK 135d                      | 2679  | □ Yes – ASK 135d                      |
|       | □ No SKIkip to 136, page 120          | 2679  | □ No SKIkip to 136, page 120          |
|       | □ Don’t know                          | 2679  | □ Don’t know                          |

#### d. At what age did he become eligible?

|       | __________ Age – ASK 135e, page 120    | 2680  | __________ Age – ASK 135e, page 120    |
|       | □ Don’t know                          | 2681  | □ Don’t know                          |
### Section 11A - HUSBAND EMPLOYED: FUTURE PENSIONS FROM CURRENT EMPLOYER - Continued

<table>
<thead>
<tr>
<th>PGM 4</th>
<th>THIRD PENSION PLAN</th>
<th>PGM 4</th>
<th>FOURTH PENSION PLAN</th>
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<td>2656</td>
<td></td>
<td>2743</td>
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<td>2665</td>
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<td></td>
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<td></td>
<td>2753</td>
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<td>2667</td>
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<td>2754</td>
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<tr>
<td>2668</td>
<td></td>
<td>2755</td>
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</tr>
</tbody>
</table>

**OR**

2655: **(Dollars only)**

- 2.00 per

2656: **Week**

- Biweekly (every two weeks)
- Twice a month
- Month
- Quarter
- Year
- Other - Specify

2742: **(Dollars only)**

- 0.00 per

2743: **Week**

- Biweekly (every two weeks)
- Twice a month
- Month
- Quarter
- Year
- Other - Specify

**Notes:**

- Nothing
- Don't know

---

**PGM 10**

**8081**

---

**PGM 3**

2657: **(Dollars only)**

- 0.00

2658: **No**

- Yes
- Don't know

2659: **No**

- Yes
- Don't know

2660: **Mostly (51%) or all stocks**

- Mostly (51%) or all interest-earning assets
- Other - Specify

2661: **No**

- Yes
- Don't know

2662: **Age - ASK 135b**

- Don't know
- Never plans to retire

2663: **Age - ASK 135c**

- Don't know
- Never plans to retire

2664: **Age - SKIP to 135e**

- Presently eligible
- Never

2665: **Age - SKIP to 135d**

- Yes - ASK 135d
- No
- Don't know

2666: **Age - ASK 135e**

- Yes - ASK 135e
- No
- Don't know
### Section 11A – HUSBAND EMPLOYED: FUTURE PENSIONS FROM CURRENT EMPLOYER – Continued

#### 135e. If your husband (were to start/had started) to receive his pension benefits at this age, how much would he receive?

If don’t know ASK: What percentage of his pay would he receive if he (were to start/had started) to receive his pension benefits at this age?

<table>
<thead>
<tr>
<th>Percentage of pay</th>
<th>2545</th>
<th>2546</th>
<th>2547</th>
<th>2548</th>
<th>2549</th>
<th>2550</th>
<th>2551</th>
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<tbody>
<tr>
<td>OR</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>$ (dollars only)</td>
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<tr>
<td>1 Week</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Biweekly (every two weeks)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>3 Twice a month</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 Quarter</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 Year</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>7 Other – Specify</td>
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<td></td>
<td></td>
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</table>

#### 136. Has your husband ever worked for another employer under this same plan?

<table>
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<th>Yes – ASK 137</th>
</tr>
</thead>
<tbody>
<tr>
<td>2553</td>
<td>No</td>
</tr>
<tr>
<td>2554</td>
<td>Don’t know</td>
</tr>
</tbody>
</table>

#### 137. How many years has your husband been covered under this plan for all of his employers?

<table>
<thead>
<tr>
<th>2555</th>
<th>Number of years</th>
</tr>
</thead>
<tbody>
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<td>2557</td>
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<tr>
<td>2559</td>
<td></td>
</tr>
<tr>
<td>2560</td>
<td></td>
</tr>
</tbody>
</table>

#### 138a. Has there ever been a time when your husband’s employer offered him a special increase in benefits from this pension plan if he retired during that period of time? Sometimes these offers are called “buyouts” or “windows”.

<table>
<thead>
<tr>
<th>2561</th>
<th>Yes – ASK 138b</th>
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</thead>
<tbody>
<tr>
<td>2562</td>
<td>No</td>
</tr>
<tr>
<td>2563</td>
<td>Don’t know</td>
</tr>
</tbody>
</table>

#### b. When is the most recent period during which these special benefits were offered?

<table>
<thead>
<tr>
<th>2564</th>
<th>From</th>
</tr>
</thead>
<tbody>
<tr>
<td>2565</td>
<td>Month</td>
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<tr>
<td>2566</td>
<td>Year</td>
</tr>
<tr>
<td>2567</td>
<td>To</td>
</tr>
<tr>
<td>2568</td>
<td>Month</td>
</tr>
<tr>
<td>2569</td>
<td>Year</td>
</tr>
</tbody>
</table>

#### c. What special benefits were offered?

Mark (X) all that apply.

<table>
<thead>
<tr>
<th>2570</th>
<th>Lump sum – How much?</th>
</tr>
</thead>
<tbody>
<tr>
<td>2571</td>
<td>$ (dollars only) (cents)</td>
</tr>
<tr>
<td>2572</td>
<td>Increase in benefits – What percentage?</td>
</tr>
<tr>
<td>2573</td>
<td>Percent</td>
</tr>
<tr>
<td>2574</td>
<td>Credit for extra years of service – How many extra years?</td>
</tr>
<tr>
<td>2575</td>
<td>Years</td>
</tr>
<tr>
<td>2576</td>
<td>Increase in benefits – What amount and time unit?</td>
</tr>
<tr>
<td>2577</td>
<td>$ (dollars only) (cents) per</td>
</tr>
<tr>
<td>2578</td>
<td>(Year, month, etc.)</td>
</tr>
<tr>
<td>2579</td>
<td>Benefits begin before they would otherwise have been available – What age will he be when benefits begin?</td>
</tr>
<tr>
<td>2580</td>
<td>Age</td>
</tr>
<tr>
<td>2581</td>
<td>Additional or improved medical benefits</td>
</tr>
<tr>
<td>2582</td>
<td>Other – Specify</td>
</tr>
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</table>

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**PAGE 120**
### Section 11A - HUSBAND EMPLOYED: FUTURE PENSIONS FROM CURRENT EMPLOYER - Continued

<table>
<thead>
<tr>
<th>PGM 4 - THIRD PENSION PLAN</th>
<th>PGM 4 - FOURTH PENSION PLAN</th>
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<td>2766 Percent of pay</td>
<td></td>
</tr>
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<td>1. Don't know</td>
<td>1. Don't know</td>
<td></td>
</tr>
<tr>
<td>OR</td>
<td>OR</td>
<td></td>
</tr>
<tr>
<td>2671 (Dollars only) $00</td>
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<td></td>
</tr>
<tr>
<td>Week</td>
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</tr>
<tr>
<td>2. Biweekly (every two weeks)</td>
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<tr>
<td>3. Twice a month</td>
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</tr>
<tr>
<td>4. Month</td>
<td>2. Biweekly (every two weeks)</td>
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</tr>
<tr>
<td>5. Quarter</td>
<td>2. Twice a month</td>
<td></td>
</tr>
<tr>
<td>6. Year</td>
<td>3. Month</td>
<td></td>
</tr>
<tr>
<td>7. Other - Specify</td>
<td>4. Quarter</td>
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</tr>
<tr>
<td></td>
<td>5. Year</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6. Other - Specify</td>
<td></td>
</tr>
</tbody>
</table>

| 2677 Yes - ASK 137          | 2762                           |       |
| 2. No                       | 2. Yes - ASK 137               |       |
| 3. Don't know               | 3. No                          |       |
|                              | 4. Don't know                  |       |
|                              | SKIP to 138a                   |       |
|                              | SKIP to 138a                   |       |

| 2678 Number of years        | 2763                           |       |
| 1. Don't know               | 1. Yes - ASK 138b              |       |
|                              | 2. No                         |       |
|                              | 3. Don't know                 |       |
|                              | Item J-4, page 122            |       |
|                              | Item J-4, page 122            |       |

<table>
<thead>
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<th>From</th>
<th>From</th>
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<tbody>
<tr>
<td>Month</td>
<td>Month</td>
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</tr>
<tr>
<td>2677 Year</td>
<td>2684 Year</td>
<td></td>
</tr>
<tr>
<td>2678 To</td>
<td>2685 To</td>
<td></td>
</tr>
<tr>
<td>Month</td>
<td>Month</td>
<td></td>
</tr>
<tr>
<td>2679 Year</td>
<td>2686 Year</td>
<td></td>
</tr>
<tr>
<td>2680 To</td>
<td>2687 To</td>
<td></td>
</tr>
<tr>
<td>Year</td>
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<tr>
<th></th>
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<tbody>
<tr>
<td>2682 $ (Dollars only)</td>
<td>2769 $ (Dollars only)</td>
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</tr>
<tr>
<td>2683 (Cents)</td>
<td>2770 (Cents)</td>
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</tr>
<tr>
<td>2684 Increase in benefits - What percentage?</td>
<td>2771 Increase in benefits - What percentage?</td>
<td></td>
</tr>
<tr>
<td>2685 Percent</td>
<td>2772 Percent</td>
<td></td>
</tr>
<tr>
<td>2686 Credit for extra years of service - How many extra years?</td>
<td>2773 Credit for extra years of service - How many extra years?</td>
<td></td>
</tr>
<tr>
<td>2687 Years</td>
<td>2774 Years</td>
<td></td>
</tr>
<tr>
<td>2688 Increase in benefits - What amount and time unit?</td>
<td>2775 Increase in benefits - What amount and time unit?</td>
<td></td>
</tr>
<tr>
<td>2689 $ (Dollars only)</td>
<td>2776 $ (Dollars only)</td>
<td></td>
</tr>
<tr>
<td>2690 (Cents)</td>
<td>2777 (Cents)</td>
<td></td>
</tr>
<tr>
<td>2691 Benefits begin before they would otherwise have been available - What age will he be when benefits begin?</td>
<td>2778 Benefits begin before they would otherwise have been available - What age will he be when benefits begin?</td>
<td></td>
</tr>
<tr>
<td>2692 Age</td>
<td>2779 Age</td>
<td></td>
</tr>
<tr>
<td>2693 Additional or improved medical benefits</td>
<td>2780 Additional or improved medical benefits</td>
<td></td>
</tr>
<tr>
<td>2694 Other - Specify</td>
<td>2781 Other - Specify</td>
<td></td>
</tr>
<tr>
<td>PGM 10</td>
<td>PGM 10</td>
<td></td>
</tr>
<tr>
<td>6081</td>
<td>6081</td>
<td></td>
</tr>
<tr>
<td>PGM 3</td>
<td>PGM 3</td>
<td></td>
</tr>
<tr>
<td>2696 Eat - Don't know</td>
<td>2782 Eat - Don't know</td>
<td></td>
</tr>
</tbody>
</table>

FORM 11A-1 (1-7-91) [1-7-91]
## Section 11A - HUSBAND EMPLOYED: FUTURE PENSIONS FROM CURRENT EMPLOYER - Continued

<table>
<thead>
<tr>
<th>CHECK ITEM J-4</th>
<th>PGM 4 - FIRST PENSION PLAN</th>
<th>PGM 3 - SECOND PENSION PLAN</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2 or more plans marked in 127c, return to 128a, page 112, omit phrase in brackets and fill in next column</td>
<td>3 or more plans marked in 127c, return to 128a, page 112, omit phrase in brackets and fill in next column</td>
</tr>
<tr>
<td></td>
<td>All others – Includes 1 plan marked or blank in 127c, SKIP to 139a, page 124</td>
<td>All others – Includes 2 plans marked in 127c, SKIP to 139a, page 124</td>
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</tbody>
</table>

**NOTES**

...
<table>
<thead>
<tr>
<th>PGM 4</th>
<th>THIRD PENSION PLAN</th>
<th>PGM 5</th>
<th>FOURTH PENSION PLAN</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>2896</td>
<td>1☐ 4 or more plans marked in 127c, return to 128a, page 112, omit phrase in brackets and fill in next column</td>
<td>2783</td>
<td>1☐ 5 or more plans marked in 127c – ASK 139a, page 124</td>
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<tr>
<td></td>
<td>2☐ All others – Includes 3 plans marked in 127c, SKIP to 139a, page 124</td>
<td></td>
<td>2☐ All others – Includes 4 plans marked in 127c, ASK 139a, page 124</td>
<td></td>
</tr>
</tbody>
</table>

NOTES
<table>
<thead>
<tr>
<th>Section 11B – HUSBAND’S CURRENT PENSION(S) FROM PREVIOUS EMPLOYERS</th>
</tr>
</thead>
</table>

### 139a. Is your husband currently receiving benefits from a pension or retirement plan not including Social Security or Railroad Retirement on any job he has previously held?  

<table>
<thead>
<tr>
<th>Option</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes</td>
<td>ASK 139b</td>
</tr>
<tr>
<td>2. No</td>
<td>SKIP to 157, page 136</td>
</tr>
<tr>
<td>3. Don’t know</td>
<td>SKIP to 157, page 136</td>
</tr>
</tbody>
</table>

**b.** We would like to ask some questions about each pension or retirement plan in which your husband has participated and is currently receiving benefits. Some employers have several different plans for which an employee may be eligible. How many plans is your husband currently receiving benefits from?  

<table>
<thead>
<tr>
<th>Option</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Only one plan is entered in 139b – Read “this plan” phrase in 140a</td>
<td></td>
</tr>
<tr>
<td>2. More than one plan is entered in 139b – Read “each plan separately” phrase in 140a</td>
<td></td>
</tr>
</tbody>
</table>

### 140a. (We would like to ask about this plan/each plan separately, beginning with the most important plan.) How much do you know about this (1st, 2nd, 3rd, 4th) pension plan? A lot, something, or very little?  

<table>
<thead>
<tr>
<th>Plan</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. A lot</td>
<td></td>
</tr>
<tr>
<td>2. Something</td>
<td></td>
</tr>
<tr>
<td>3. Very little/Nothing</td>
<td></td>
</tr>
</tbody>
</table>

**b.** When did your husband stop working for the employer of this plan/1st, 2nd, 3rd, 4th plan?  

<table>
<thead>
<tr>
<th>Month</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>GO to Check Item J-6</td>
</tr>
</tbody>
</table>

If don’t know ASK: Did he stop working before or after 1982?  

<table>
<thead>
<tr>
<th>Option</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. During or after 1982 – SKIP to 141a</td>
<td></td>
</tr>
<tr>
<td>2. Before 1982</td>
<td>SKIP to Check Item J-8, page 134</td>
</tr>
<tr>
<td>3. Don’t know</td>
<td>SKIP to Check Item J-8, page 134</td>
</tr>
</tbody>
</table>

**CHECK ITEM J-6**  

Refer to item 140b above. Is year in item 140b before 1982? (1981 or earlier)  

<table>
<thead>
<tr>
<th>Option</th>
<th>Action</th>
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</thead>
<tbody>
<tr>
<td>1. Yes</td>
<td>ASK to Check Item J-8, page 134</td>
</tr>
<tr>
<td>2. No</td>
<td>ASK 141a</td>
</tr>
</tbody>
</table>

### 141a. What was the full name of this company, business organization, or employer?  

**b.** In what city, state and county (if any) is this employer located?  

### 142. Is this employer –  

(Read answer categories)  

<table>
<thead>
<tr>
<th>Option</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. A private employer?</td>
<td></td>
</tr>
<tr>
<td>2. A military organization?</td>
<td></td>
</tr>
<tr>
<td>3. The Federal government (civilian)?</td>
<td></td>
</tr>
<tr>
<td>4. A State or local government?</td>
<td></td>
</tr>
<tr>
<td>5. A union?</td>
<td></td>
</tr>
<tr>
<td>6. Any other source?</td>
<td></td>
</tr>
<tr>
<td>PGM 4</td>
<td>THIRD PENSION</td>
</tr>
<tr>
<td>-------</td>
<td>---------------</td>
</tr>
<tr>
<td>2989</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ A lot</td>
</tr>
<tr>
<td></td>
<td>□ Something</td>
</tr>
<tr>
<td></td>
<td>□ Very little/Nothing</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Month</th>
<th>Year</th>
<th>GO to Check Item J-6</th>
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<tr>
<td></td>
<td>19</td>
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<table>
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<th>Month</th>
<th>Year</th>
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</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>19</td>
<td></td>
</tr>
</tbody>
</table>

| 2992  | □ During or after 1982 - SKIP to 141a |
|       | □ Before 1982                      |
|       | □ Don't know                       |
| 3083  | □ During or after 1982 - SKIP to 141a |
|       | □ Before 1982                      |
|       | □ Don't know                       |

| 2993  | □ Yes – SKIP to Check Item J-8, page 134 |
|       | □ No – ASK 141a                        |
| 3084  | □ Yes – SKIP to Check Item J-8, page 134 |
|       | □ No – ASK 141a                        |

| 2994  | □ Same as employer in 114a, page 89 - SKIP to 143a, page 126 |
| 3085  | □ Same as employer in 114a, page 89 - SKIP to 143a, page 126 |

<table>
<thead>
<tr>
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<th>Name</th>
<th>Name</th>
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<tr>
<td></td>
<td>State</td>
<td>State</td>
</tr>
<tr>
<td></td>
<td>County</td>
<td>County</td>
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</table>

<table>
<thead>
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<th>PGM 3</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2995</td>
<td>□ A private employer?</td>
<td>□ A military organization?</td>
<td>□ The Federal government (civilian)?</td>
</tr>
<tr>
<td></td>
<td>□ A State or local government?</td>
<td>□ A union?</td>
<td>□ Any other source?</td>
</tr>
<tr>
<td>3086</td>
<td>□ A private employer?</td>
<td>□ A military organization?</td>
<td>□ The Federal government (civilian)?</td>
</tr>
<tr>
<td></td>
<td>□ A State or local government?</td>
<td>□ A union?</td>
<td>□ Any other source?</td>
</tr>
<tr>
<td>Section 11B – HUSBAND’S CURRENT PENSION(S) FROM PREVIOUS EMPLOYERS – Continued</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>-------------------------------------------------------------</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>143a. How many years did your husband work for</strong></td>
<td><strong>PGM 4</strong></td>
<td><strong>FIRST PENSION PLAN</strong></td>
<td></td>
</tr>
<tr>
<td>the employer who offered this plan?</td>
<td></td>
<td>Number of years</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2814</td>
<td>2905</td>
</tr>
<tr>
<td><strong>b. How many years was your</strong></td>
<td></td>
<td>Don’t know</td>
<td></td>
</tr>
<tr>
<td>husband included in this plan? Please include only</td>
<td></td>
<td>2815</td>
<td>2906</td>
</tr>
<tr>
<td>the years that count toward his pension or</td>
<td></td>
<td>Don’t know</td>
<td></td>
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<tr>
<td>retirement benefits.</td>
<td></td>
<td>2816</td>
<td>2907</td>
</tr>
<tr>
<td><strong>SHOW FLASHCARD H</strong></td>
<td></td>
<td>Don’t know</td>
<td></td>
</tr>
<tr>
<td><strong>(As mentioned before,) In the most common</strong></td>
<td></td>
<td>2817</td>
<td>2908</td>
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<tr>
<td>pension or retirement plan, Type A, the amount of**</td>
<td></td>
<td>Don’t know</td>
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<tr>
<td>the benefits is usually based on a FORMULA involving**</td>
<td></td>
<td>2818</td>
<td>2909</td>
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<tr>
<td>years of service, and salary. In other plans, Type B,**</td>
<td></td>
<td>Type A (formula) – ASK 144b</td>
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<tr>
<td>money is accumulated in a type of SAVINGS ACCOUNT**</td>
<td></td>
<td>Type B (savings) – SKIP to 147, page 128</td>
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<tr>
<td>for your husband until his retirement. Is this plan a**</td>
<td></td>
<td>Both – SKIP to 145a</td>
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<tr>
<td>‘formula’ plan, Type A, or a ‘savings account’ plan,**</td>
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<td>Don’t know – ASK 144b</td>
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<tr>
<td>Type B?</td>
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<tr>
<td><strong>b. How much did he contribute to this plan?</strong></td>
<td></td>
<td>Percent of pay</td>
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<td></td>
<td></td>
<td>2820</td>
<td>2911</td>
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<tr>
<td></td>
<td></td>
<td>Don’t know</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>OR</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2821</td>
<td>2912</td>
</tr>
<tr>
<td></td>
<td></td>
<td>($dollars only)</td>
<td>per</td>
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<td></td>
<td></td>
<td>2822</td>
<td>2913</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Week</td>
<td>00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Biweekly (every two weeks)</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>Twice a month</td>
<td>00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Month</td>
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<td></td>
<td>Quarter</td>
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<td></td>
<td></td>
<td>Year</td>
<td>00</td>
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<tr>
<td></td>
<td></td>
<td>Other – Specify</td>
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</tr>
<tr>
<td><strong>145a. If your husband worked long enough for</strong></td>
<td></td>
<td>Age – ASK 145b</td>
<td></td>
</tr>
<tr>
<td>this employer, at what age (did/would) he first**</td>
<td></td>
<td>2823</td>
<td>2914</td>
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<tr>
<td>become eligible to receive full benefits?</td>
<td></td>
<td>Don’t know</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>2824</td>
<td>2915</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Never eligible</td>
<td>SKIP to 145c</td>
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<tr>
<td><strong>b. If your husband had started to receive</strong></td>
<td></td>
<td>Percent of pay</td>
<td></td>
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<tr>
<td>his full pension benefits at this earliest age, how**</td>
<td></td>
<td>2825</td>
<td>2916</td>
</tr>
<tr>
<td>much (did/would) he receive?</td>
<td></td>
<td>Don’t know</td>
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<tr>
<td>If don’t know ASK: What percentage of his pay would**</td>
<td></td>
<td>OR</td>
<td></td>
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<tr>
<td>he receive if your husband had started to receive**</td>
<td></td>
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<td>2917</td>
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<td>his full pension benefits at this earliest age?</td>
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<td>($dollars only)</td>
<td>per</td>
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<td></td>
<td></td>
<td>2827</td>
<td>2918</td>
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<td>Biweekly (every two weeks)</td>
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<td></td>
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<td>Twice a month</td>
<td>00</td>
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<td>Month</td>
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<td></td>
<td>Quarter</td>
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<td></td>
<td></td>
<td>Year</td>
<td>00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Other – Specify</td>
<td></td>
</tr>
<tr>
<td><strong>c. If your husband (wishes/ had wished), could he</strong></td>
<td></td>
<td>Age – ASK 146a</td>
<td></td>
</tr>
<tr>
<td>(have) retired (earlier) and still receive(d) reduced**</td>
<td></td>
<td>2829</td>
<td>2920</td>
</tr>
<tr>
<td>benefits from this plan?</td>
<td></td>
<td>Yes – ASK 146a</td>
<td></td>
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<tr>
<td></td>
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<td>2830</td>
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<td>No</td>
<td>SKIP to Check Item J-7, page 128</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Don’t know</td>
<td>SKIP to Check Item J-7, page 128</td>
</tr>
<tr>
<td><strong>146a. If your husband worked long enough for</strong></td>
<td></td>
<td>No reduced benefits available</td>
<td></td>
</tr>
<tr>
<td>this employer, at what age (did/would) he first**</td>
<td></td>
<td>2831</td>
<td>2922</td>
</tr>
<tr>
<td>become eligible to retire and receive REDUCED**</td>
<td></td>
<td>Don’t know</td>
<td></td>
</tr>
<tr>
<td>benefits?</td>
<td></td>
<td>2832</td>
<td>2923</td>
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<tr>
<td>PGM 4</td>
<td>THIRD PENSION PLAN</td>
<td>PGM 5</td>
<td>FOURTH PENSION PLAN</td>
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<td>-------</td>
<td>--------------------</td>
<td>-------</td>
<td>--------------------</td>
</tr>
<tr>
<td>2996</td>
<td>□ Type A (formula) – ASK 144b</td>
<td>3091</td>
<td>□ Type A (formula) – ASK 144b</td>
</tr>
<tr>
<td>2997</td>
<td>□ Type B (savings) – SKIP to 147, page 128</td>
<td>3092</td>
<td>□ Type B (savings) – SKIP to 147, page 128</td>
</tr>
<tr>
<td>2998</td>
<td>□ Both – SKIP to 145a</td>
<td>3093</td>
<td>□ Both – SKIP to 145a</td>
</tr>
<tr>
<td>2999</td>
<td>□ Don’t know – ASK 144b</td>
<td></td>
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| 3000  | □ Type A (formula) – ASK 145b | 3103  | □ Type A (formula) – ASK 145b |       |
| 3001  | □ Type B (savings) – SKIP to 147, page 128 | 3104  | □ Type B (savings) – SKIP to 147, page 128 |       |
| 3002  | □ Both – SKIP to 145a |       | □ Both – SKIP to 145a |       |
| 3003  | □ Don’t know – ASK 144b |       | □ Don’t know – ASK 144b |       |

| 3000  | □ Type A (formula) – ASK 145b | 3103  | □ Type A (formula) – ASK 145b |       |
| 3001  | □ Type B (savings) – SKIP to 147, page 128 | 3104  | □ Type B (savings) – SKIP to 147, page 128 |       |
| 3002  | □ Both – SKIP to 145a |       | □ Both – SKIP to 145a |       |
| 3003  | □ Don’t know – ASK 144b |       | □ Don’t know – ASK 144b |       |

| 3112  | □ No reduced benefits available | 3103  | □ No reduced benefits available |       |
| 3113  | □ Don’t know |       | □ Don’t know |       |

**FORM LCT-3161 (7-20-82) Page 127**
### Section 11B – HUSBAND’S CURRENT PENSION(S) FROM PREVIOUS EMPLOYERS – Continued

<table>
<thead>
<tr>
<th>146b. If your husband (were to start/had started) to receive reduced benefits from this plan at this earliest age, how much would he receive?</th>
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<td><strong>FIRST PENSION PLAN</strong></td>
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</tbody>
</table>

| 2860 | 2907 | 6087 |
| 2862 | 2908 | 6093 |
| 2863 | 2909 | 6092 |
| 2864 | 2910 | 6091 |

### c. Will the amount that your husband receives/received eventually decrease as a result of social security benefits? |
<table>
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</table>

### d. Will this change take place automatically at age 62, automatically at age 65, whenever social security benefits begin, or at some other time? |
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</tr>
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</table>

### 147. Could you tell me a little more about your husband’s account plan? Is it a thrift or savings plan, a 401K, a profit-sharing plan, a stock-purchase plan, or what? |
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</thead>
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### 148a. How much did HIS EMPLOYER contribute in his last year of work? |
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</thead>
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</table>

| 2856 | 6087 |
| 2857 | 6093 | 6092 | 6091 | 6090 | 6088 |
| 2858 | 6093 | 6092 | 6091 | 6090 | 6088 |
### Section 11B - HUSBAND'S CURRENT PENSION(S) FROM PREVIOUS EMPLOYERS - Continued

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<td>OR</td>
</tr>
<tr>
<td>3017</td>
<td>$ (dollars only) $00 per</td>
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<tr>
<td>3018</td>
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<tr>
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<td>□ At age 62</td>
</tr>
<tr>
<td>3021</td>
<td>□ Thrift or savings</td>
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<tr>
<td>3022</td>
<td>□ 401K/403B/Supplemental Retirement Account (SRA)</td>
</tr>
<tr>
<td>3023</td>
<td>□ Profit sharing</td>
</tr>
<tr>
<td>3024</td>
<td>□ Stock purchase, Employee Stock Ownership Program (ESOP)</td>
</tr>
<tr>
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<td><strong>PGM 5</strong></td>
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*Notes:*

- **Skip to Check Item J-7**
- **Skip to 149, page 130**
- **Skip to 150c, page 130**

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**FORM LGT-3181 (7-26-92)**

Page 129
### Section 11B - HUSBAND'S CURRENT PENSION(S) FROM PREVIOUS EMPLOYERS - Continued

<table>
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<tr>
<th>Question</th>
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</table>

Roughly how much money is in his account at present? Include both your husband's and your husband's employer's contributions and earnings.

<table>
<thead>
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Was your husband able to choose how the money in his account is invested? It is mostly in stocks, mostly in interest-earning assets, or is it split evenly between these, or what?

<table>
<thead>
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<th>Question</th>
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</table>

How is the money in this account invested? Is it mostly in stocks, mostly in interest-earning assets, or is it split evenly between these, or what?

<table>
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How much money is he currently receiving?

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When did he start receiving this pension?

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If your husband were to die before you, would you be able to receive regular monthly payments from this plan, either then or in the future?

<table>
<thead>
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<td>□ Mostly (51%) or all stocks</td>
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<td>□ Mostly (51%) or all interest-earning assets</td>
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Section 11B – HUSBAND’S CURRENT PENSION(S) FROM PREVIOUS EMPLOYERS – Continued

151a. Is the amount of money that he is now receiving the same as when he first retired?

- Yes – SKIP to 154
- No – ASK 151b

151b. How much did he receive when he first retired?

- Percent of pay
  - Don’t know
  - OR
  - $0.00 per

152a. Since your husband started collecting benefits under this plan, has his retirement pension ever been increased for cost of living changes?

- Yes – ASK 152b
- No
- Don’t know – SKIP to 153a

153a. Has the amount that your husband receives decreased since he first began receiving it?

- Yes – ASK 153b
- No
- Don’t know – SKIP to 154

154. Did your husband ever work for another employer under this same plan?

- Yes – ASK 155
- No
- Don’t know – SKIP to 156a

155. How many years was he covered under this plan for all of his employers?

- Don’t know

156a. Has there ever been a time when your husband’s employer offered him a special increase in benefits from this pension plan if he retired during that period of time? Sometimes these offers are called ‘buyouts’ or ‘windows’.

- Yes – ASK 156b
- No
- Don’t know – SKIP to Check Item J-8, page 134

156b. When is the most recent period during which these special benefits were offered?

- From
  - Month
  - Year
  - To
  - Month
  - Year

Page 132
<table>
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<th>Section 11B – HUSBAND’S CURRENT PENSION(S) FROM PREVIOUS EMPLOYERS – Continued</th>
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| **OR** |
|-----------------|-----------------|-----------------|-----------------|
| ☐ Don’t know    | ☐ Don’t know    | ☐ Don’t know    | ☐ Don’t know    |

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**Section 11B – HUSBAND’S CURRENT PENSION(S) FROM PREVIOUS EMPLOYERS – Continued**

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<td>2883</td>
<td>$</td>
<td>2974</td>
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<tr>
<td>2884</td>
<td>(Dollars only)</td>
<td>2975</td>
<td>(Dollars only)</td>
</tr>
<tr>
<td>2885</td>
<td>(Cents)</td>
<td>2976</td>
<td>(Cents)</td>
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<td>2886</td>
<td>☐ Increase in benefits – What percentage?</td>
<td>2977</td>
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<td>2887</td>
<td>☐ Credit for years of service – How many extra years?</td>
<td>2978</td>
<td>☐ Credit for extra years of service – How many extra years?</td>
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<td>☐ Increase in benefits – What amount and time unit?</td>
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<td>☐ (Dollars only)</td>
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<td>2981</td>
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<td>(Year, month, etc.)</td>
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<td>2892</td>
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<td>☐ Benefits begin before they would otherwise have been available – What age will he be when benefits begin?</td>
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**CHECK ITEM J-S**

Refer to item 139b, page 124.

Is there more than one plan?

1. ☐ 2 or more plans marked in 139b, return to 140a, page 124, omit phrase in brackets and fill in next column
2. ☐ All others – Includes 1 plan marked in 139b, SKIP to 157, page 136

1. ☐ 3 or more plans marked in 139b, return to 140a, page 124, omit phrase in brackets and fill in next column
2. ☐ All others – Includes 2 plans marked in 139b, SKIP to 157, page 136

**NOTES**

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Page 134
| Date: 1981 (7-20-81) | Page 135 |

| Section 11B – HUSBAND’S CURRENT PENSION(S) FROM PREVIOUS EMPLOYERS – Continued |

<table>
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<td>□ Lump sum – How much? $</td>
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### Section 11C – HUSBAND’S FUTURE PENSION(S) FROM PREVIOUS EMPLOYERS

157. (Aside from the plans we have mentioned, HAS YOUR HUSBAND EVER BEEN covered by any other pension or retirement plan not including Social Security or Railroad Retirement on any job your husband has previously held?)

- □ Yes – ASK 158
- □ No
- □ Don’t know
  
  **SKIP to Check Item K-1, page 148**

158. Some employers have several different pension and retirement plans for which an employee may be eligible. How many plans from all previous jobs does your husband expect to receive benefits from or has received lump sum settlements from?

- □ Don’t know – **SKIP to Check Item K-1, page 148**

**CHECK ITEM J-9**

Refer to item 158 above.

- □ Only one plan is entered in 158 – Read “this plan” phrase in 159a
- □ More than one plan is entered in 158 – Read “each plan separately” phrase in 159a

159a. (We would like to ask about (this plan/each plan separately), beginning with the most important plan.) How much do you know about this (1st, 2nd, 3rd, 4th) pension plan? A lot, something, or very little?

- □ A lot
- □ Something
- □ Very little/Nothing

**PGM 3**

**FIRST PENSION**

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**PGM 4**

**SECOND PENSION**

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### CHECK ITEM J-10

Refer to item 159b above. Is year in item 159b before 1982? (1983 or earlier)

- □ Yes – **SKIP to Check Item J-13, page 146**
- □ No – ASK 160

160. There is a law that states that once your husband has been with an employer long enough he is vested and can receive some pension benefits even if he leaves that employer. Did he work under the plan long enough to earn this right to be vested?

- □ Yes – ASK 161a
- □ No
- □ Don’t know
  
  **SKIP to Check Item J-13, page 146**

161a. What (is/was) the full name of this company, business organization, or employer?

**PGM 11**

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**PGM 11**

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### b. In what city, state and county (is/was) (Employer in 161a) located?

- City
- State
- County

162. Is this employer –

(Read answer categories)

- □ A private employer?
- □ A military organization?
- □ The Federal government (civilian)?
- □ A State or local government?
- □ A union?
- □ Any other source?

- □ A private employer?
- □ A military organization?
- □ The Federal government (civilian)?
- □ A State or local government?
- □ A union?
- □ Any other source?
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FORM LGT-3161 (7-20-92)
### Section 11C - HUSBAND’S FUTURE PENSION(S) FROM PREVIOUS EMPLOYERS - Continued

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<td>163a. How many years did your husband work for the employer who offered this plan?</td>
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**SHOW FLASHCARD H**

164a. (As mentioned before.) In the most common pension or retirement plan, Type A, the amount of the benefit is usually based on a FORMULA involving age, years of service, and salary. In other plans, Type B, money is accumulated in a type of SAVINGS ACCOUNT for your husband until your husband’s retirement. Is this plan a “formula” plan, Type A, or a “savings account” plan, Type B?

|   | 3206  | □ Type A (formula) - ASK 164b |
|   |       | □ Type B (savings) - SKIP to 167, page 140 |
|   |       | □ Both - SKIP to 165a |
|   |       | □ Don’t know - ASK 164b |
|   | 3295  | □ Type A (formula) - ASK 164b |
|   |       | □ Type B (savings) - SKIP to 167, page 140 |
|   |       | □ Both - SKIP to 165a |
|   |       | □ Don’t know - ASK 164b |

b. How much did your husband contribute to this plan?

|   | 3207  | Percent of pay    |
|   | 3208  | □ Don’t know       |
|   |       | OR                |
|   | 3209  | $ _______ 00 per   |
|   |       | □ Week             |
|   |       | □ Biweekly (every two weeks) |
|   |       | □ Twice a month   |
|   |       | □ Month           |
|   |       | □ Quarter        |
|   |       | □ Year           |
|   |       | □ Other - Specify |
|   | 3296  | Percent of pay    |
|   | 3297  | □ Don’t know       |
|   |       | OR                |
|   | 3298  | $ _______ 00 per   |
|   |       | □ Week             |
|   |       | □ Biweekly (every two weeks) |
|   |       | □ Twice a month   |
|   |       | □ Month           |
|   |       | □ Quarter        |
|   |       | □ Year           |
|   |       | □ Other - Specify |

165a. If your husband had worked long enough for this employer, at what age would he first become eligible to receive FULL benefits?

|   | 3211  | Age - ASK 165b     |
|   | 3212  | □ Don’t know - SKIP to 165d, page 140 |
|   |       | □ Never eligible - ASK 165b |
|   | 3300  | Age - ASK 165b     |
|   | 3301  | □ Don’t know - SKIP to 165d, page 140 |
|   |       | □ Never eligible - ASK 165b |

b. What was your husband’s salary when he left his employer?

|   | 3213  | $ _______ 00 per   |
|   |       | □ Week             |
|   |       | □ Biweekly (every two weeks) |
|   |       | □ Twice a month   |
|   |       | □ Month           |
|   |       | □ Quarter        |
|   |       | □ Year           |
|   |       | □ Other - Specify |
|   | 3302  | $ _______ 00 per   |
|   |       | □ Week             |
|   |       | □ Biweekly (every two weeks) |
|   |       | □ Twice a month   |
|   |       | □ Month           |
|   |       | □ Quarter        |
|   |       | □ Year           |
|   |       | □ Other - Specify |

CHECK ITEM J-11

Refer to 165a above.

<p>|   | 3216  | □ Box 2, “Never eligible” is marked in 165a - SKIP to 165d, page 140 |
|   |       | □ All others - ASK 165c, page 140 |
|   | 3305  | □ Box 2, “Never eligible” is marked in 165a - SKIP to 165d, page 140 |
|   |       | □ All others - ASK 165c, page 140 |</p>
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<tr>
<td></td>
<td>□ Type B (savings) – SKIP to 167, page 140</td>
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<td></td>
<td>□ Both – SKIP to 165a</td>
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<tr>
<td></td>
<td>□ Don’t know – ASK 164b</td>
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<td>□ Don’t know</td>
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<td>$ (Dollars only)</td>
<td>3476</td>
<td>$ (Dollars only)</td>
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<td>□ Week</td>
<td>3477</td>
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<td>□ Biweekly (every two weeks)</td>
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<td>□ Year</td>
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<td>□ Year</td>
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| □ Don’t know |
| □ Don’t know |

| □ Box 2, "Never eligible" is marked in 165a – SKIP to 165d, page 140 |
| □ All others – ASK 165c, page 140 |

| □ Box 2, "Never eligible" is marked in 165a – SKIP to 165d, page 140 |
| □ All others – ASK 165c, page 140 |
### Section 11C – HUSBAND’S FUTURE PENSION(S) FROM PREVIOUS EMPLOYERS – Continued

#### 165c. If your husband had started to receive his full pension benefits at this earliest age, how much would he receive?

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<td>3. Twice a month</td>
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<td>3. Twice a month</td>
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<tr>
<td></td>
<td>7. Other – Specify</td>
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</table>

If don’t know ASK: What percentage of his pay would he receive if your husband had started to receive his full pension benefits at this earliest age?

#### 166a. If your husband had worked long enough for this employer, at what age would he be eligible to retire and receive REDUCED benefits?

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#### b. At what age did your husband become eligible?

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#### c. If your husband (were to start/had started) to receive reduced benefits from this plan at this earliest age, how much would he receive?

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If don’t know ASK: What percentage of his pay would he receive if your husband (were to start/had started) to receive reduced benefits from this plan at this earliest age?

### CHECK ITEM J-12

Refer to item 164a, page 138.

### SHOW FLASHCARD 1

**167. Could you tell me a little more about your husband’s account plan? Is it a thrift or savings plan, a 401K, a profit-sharing plan, a stock-purchase plan, or what?**

Mark (X) all that apply.

- [ ] Thrift or savings
- [ ] 401K/403B/Supplemental Retirement Account (SRA)
- [ ] Profit sharing
- [ ] Stock purchase, Employee Stock Ownership Program (ESOP)
- [ ] Other – Specify

Page 140
<table>
<thead>
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### Section 11C – HUSBAND’S FUTURE PENSION(S) FROM PREVIOUS EMPLOYERS – Continued

#### 168. How much did your husband's employer contribute to this plan?

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<tr>
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<th>PGM 4 SECOND PENSION PLAN</th>
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<tbody>
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<td>3237 Percent of pay</td>
<td>3236 Percent of pay</td>
</tr>
<tr>
<td>3238 Nothing</td>
<td>3237 Nothing</td>
</tr>
<tr>
<td>3239 Don't know</td>
<td>3238 Don't know</td>
</tr>
<tr>
<td>OR</td>
<td>OR</td>
</tr>
<tr>
<td>$ (Dollars only) 00 per</td>
<td>$ (Dollars only) 00 per</td>
</tr>
<tr>
<td>3240 Week</td>
<td>3241 Week</td>
</tr>
<tr>
<td>3242 Biweekly (every two weeks)</td>
<td>3243 Biweekly (every two weeks)</td>
</tr>
<tr>
<td>3243 Twice a month</td>
<td>3244 Twice a month</td>
</tr>
<tr>
<td>3245 Month</td>
<td>3246 Month</td>
</tr>
<tr>
<td>3246 Quarter</td>
<td>3247 Quarter</td>
</tr>
<tr>
<td>3248 Year</td>
<td>3249 Year</td>
</tr>
<tr>
<td>3249 Other – Specify ' '</td>
<td>3250 Other – Specify ' '</td>
</tr>
</tbody>
</table>

#### 169. How much did your husband contribute to this plan?

<table>
<thead>
<tr>
<th>PGM 3</th>
<th>PGM 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>3241 Percent of pay</td>
<td>3242 Percent of pay</td>
</tr>
<tr>
<td>3243 Nothing</td>
<td>3244 Nothing</td>
</tr>
<tr>
<td>3245 Don't know</td>
<td>3246 Don't know</td>
</tr>
<tr>
<td>OR</td>
<td>OR</td>
</tr>
<tr>
<td>$ (Dollars only) 00 per</td>
<td>$ (Dollars only) 00 per</td>
</tr>
<tr>
<td>3247 Week</td>
<td>3248 Week</td>
</tr>
<tr>
<td>3249 Biweekly (every two weeks)</td>
<td>3250 Biweekly (every two weeks)</td>
</tr>
<tr>
<td>3251 Twice a month</td>
<td>3252 Twice a month</td>
</tr>
<tr>
<td>3253 Month</td>
<td>3254 Month</td>
</tr>
<tr>
<td>3254 Quarter</td>
<td>3255 Quarter</td>
</tr>
<tr>
<td>3255 Year</td>
<td>3256 Year</td>
</tr>
</tbody>
</table>
| 3256 Other – Specify ' ' | 3257 Other – Specify ' '

#### 170a. Roughly how much money is in your husband’s account at present? Include both your husband’s and your husband’s employer’s contributions and earnings.

<table>
<thead>
<tr>
<th>PGM 3</th>
<th>PGM 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>3245 $ (Dollars only) 00</td>
<td>3246 $ (Dollars only) 00</td>
</tr>
<tr>
<td>3247 Nothing</td>
<td>3248 Nothing</td>
</tr>
<tr>
<td>3248 Don't know</td>
<td>3249 Don't know</td>
</tr>
</tbody>
</table>

#### b. Was he able to choose how the money was invested?

<table>
<thead>
<tr>
<th>PGM 3</th>
<th>PGM 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>3247 Yes</td>
<td>3248 Yes</td>
</tr>
<tr>
<td>3248 No</td>
<td>3249 No</td>
</tr>
<tr>
<td>3249 Don't know</td>
<td>3250 Don't know</td>
</tr>
</tbody>
</table>

#### c. How (is/was) the money in this account invested? (Is/Was) it mostly in stocks, mostly in interest-earning assets, (Is/was) it split evenly between these, or what?

<table>
<thead>
<tr>
<th>PGM 3</th>
<th>PGM 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>3248 Mostly (51%) or all stocks</td>
<td>3249 Mostly (51%) or all stocks</td>
</tr>
<tr>
<td>3250 Mostly (51%) or all interest-earning assets</td>
<td>3251 Mostly (51%) or all interest-earning assets</td>
</tr>
<tr>
<td>3251 Split evenly between the two</td>
<td>3252 Split evenly between the two</td>
</tr>
<tr>
<td>3252 Other – Specify ' '</td>
<td>3253 Other – Specify ' '</td>
</tr>
<tr>
<td>3253 Don't know</td>
<td>3254 Don't know</td>
</tr>
</tbody>
</table>

#### 171. If your husband were to die before you, would you be able to receive regular monthly payments from this plan, either now or in the future?

<table>
<thead>
<tr>
<th>PGM 3</th>
<th>PGM 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>3249 Yes</td>
<td>3250 Yes</td>
</tr>
<tr>
<td>3250 No</td>
<td>3251 No</td>
</tr>
<tr>
<td>3251 Don't know</td>
<td>3252 Don't know</td>
</tr>
</tbody>
</table>

#### 172a. At what age does your husband expect to begin to collect benefits from this pension or retirement plan?

<table>
<thead>
<tr>
<th>PGM 3</th>
<th>PGM 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>3250 Age – SKIP to 173, page 144</td>
<td>3251 Age – SKIP to 173, page 144</td>
</tr>
<tr>
<td>3251 Haven't decided yet</td>
<td>3252 Haven't decided yet</td>
</tr>
<tr>
<td>3252 Don't know</td>
<td>3253 Don't know</td>
</tr>
</tbody>
</table>

FORM LDT-3161 (7-20-92)
### Section 11C - HUSBAND'S FUTURE PENSION(S) FROM PREVIOUS EMPLOYERS - Continued

<table>
<thead>
<tr>
<th>PGM 4</th>
<th>THIRD PENSION PLAN</th>
<th>PGM 4</th>
<th>FOURTH PENSION PLAN</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>3415</td>
<td>Percent of pay</td>
<td>3504</td>
<td>Percent of pay</td>
<td></td>
</tr>
<tr>
<td>3416</td>
<td>☐ Nothing</td>
<td>3505</td>
<td>☐ Nothing</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Don't know</td>
<td>3506</td>
<td>☐ Don't know</td>
<td></td>
</tr>
<tr>
<td>OR</td>
<td>$ (Dollars only)</td>
<td>3507</td>
<td>$ (Dollars only)</td>
<td></td>
</tr>
<tr>
<td>3417</td>
<td>00 per</td>
<td>3508</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3418</td>
<td>☐ Week</td>
<td>3509</td>
<td>☐ Week</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Biweekly (every two weeks)</td>
<td>3510</td>
<td>☐ Biweekly (every two weeks)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Twice a month</td>
<td>3511</td>
<td>☐ Twice a month</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Month</td>
<td></td>
<td>☐ Month</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Quarter</td>
<td></td>
<td>☐ Quarter</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Year</td>
<td></td>
<td>☐ Year</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Other - Specify</td>
<td></td>
<td>☐ Other - Specify</td>
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<table>
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<th>6123</th>
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<td>☐ Nothing</td>
<td>3509</td>
<td>☐ Nothing</td>
<td></td>
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<td></td>
<td>☐ Don't know</td>
<td>3510</td>
<td>☐ Don't know</td>
<td></td>
</tr>
<tr>
<td>OR</td>
<td>$ (Dollars only)</td>
<td>3511</td>
<td>$ (Dollars only)</td>
<td></td>
</tr>
<tr>
<td>3421</td>
<td>00 per</td>
<td>3512</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3422</td>
<td>☐ Week</td>
<td>3513</td>
<td>☐ Week</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Biweekly (every two weeks)</td>
<td>3514</td>
<td>☐ Biweekly (every two weeks)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Twice a month</td>
<td>3515</td>
<td>☐ Twice a month</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Month</td>
<td></td>
<td>☐ Month</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Quarter</td>
<td></td>
<td>☐ Quarter</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Year</td>
<td></td>
<td>☐ Year</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Other - Specify</td>
<td></td>
<td>☐ Other - Specify</td>
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<th>PGM 3</th>
<th>6124</th>
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<tbody>
<tr>
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<td>$ (Dollars only)</td>
<td>3512</td>
<td>$ (Dollars only)</td>
<td></td>
</tr>
<tr>
<td>3424</td>
<td>00</td>
<td>3513</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3425</td>
<td>☐ Yes</td>
<td>3514</td>
<td>☐ Yes</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ No</td>
<td>3515</td>
<td>☐ No</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Don't know</td>
<td>3516</td>
<td>☐ Don't know</td>
<td></td>
</tr>
<tr>
<td>3426</td>
<td>☐ Mostly (51%) or all stocks</td>
<td>3517</td>
<td>☐ Mostly (51%) or all stocks</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Mostly (51%) or all interest-earning assets</td>
<td>3518</td>
<td>☐ Mostly (51%) or all interest-earning assets</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Split evenly between the two</td>
<td>3519</td>
<td>☐ Split evenly between the two</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Other - Specify</td>
<td>3520</td>
<td>☐ Other - Specify</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Don't know</td>
<td>3521</td>
<td>☐ Don't know</td>
<td></td>
</tr>
<tr>
<td>3427</td>
<td>☐ Yes</td>
<td>3522</td>
<td>☐ Yes</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ No</td>
<td>3523</td>
<td>☐ No</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Don't know</td>
<td>3524</td>
<td>☐ Don't know</td>
<td></td>
</tr>
</tbody>
</table>

| 3428   | Age - SKIP to 173, page 144 | 3525   | Age - SKIP to 173, page 144 |
| 3429   | ☐ Haven't decided yet | 3526   | ☐ Haven't decided yet |
|        | ☐ Don't know | 3527   | ☐ Don't know |
|        | ☐ Don't know | 3528   | ☐ Don't know |

FORM LOT: 3161 (7-20-91)
### Section 11C – HUSBAND’S FUTURE PENSION(S) FROM PREVIOUS EMPLOYERS – Continued

#### 172b. Is he eligible to retire now?

<table>
<thead>
<tr>
<th>PGM 4</th>
<th>FIRST PENSION PLAN</th>
<th>PGM 3</th>
<th>SECOND PENSION PLAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>3252</td>
<td>□ Yes – ASK 172c</td>
<td>□ Yes – ASK 172c</td>
<td>□ Yes – ASK 172c</td>
</tr>
<tr>
<td>□ No</td>
<td>□ Don’t know</td>
<td>□ No</td>
<td>□ Don’t know</td>
</tr>
<tr>
<td></td>
<td>SKIP to 174a</td>
<td>SKIP to 174a</td>
<td>SKIP to 174a</td>
</tr>
</tbody>
</table>

#### c. At what age did he become eligible?

<table>
<thead>
<tr>
<th>PGM 4</th>
<th>PGM 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>3253</td>
<td>□ Don’t know</td>
</tr>
<tr>
<td>3254</td>
<td>□ Age – ASK 173</td>
</tr>
</tbody>
</table>

#### 173. If your husband (were to start/had started) to receive his pension benefits at this age, how much would he receive?

If don’t know ASK: What percentage of your husband’s pay would he receive if he (were to start/had started) to receive his pension benefits at this age?

| □ Don’t know |
| □ Percent of pay |

**OR**

| □ $ (dollars only) | 00 per |
| □ Week |
| □ Every two weeks |
| □ Twice a month |
| □ Month |
| □ Quarter |
| □ Year |
| □ Other – Specify |

| □ Don’t know |
| □ Percent of pay |

**OR**

| □ $ (dollars only) | 00 per |
| □ Week |
| □ Every two weeks |
| □ Twice a month |
| □ Month |
| □ Quarter |
| □ Year |
| □ Other – Specify |

#### 174a. Did your husband ever work for another employer under this same plan?

| □ Yes – ASK 174b |
| □ No  |
| □ Don’t know |

#### b. How many years was your husband covered under this plan for all of his employers?

| □ Don’t know |
| □ Number of years |

#### 175a. Has there ever been a time when your husband’s employer offered him a special increase in benefits from this pension plan if he retired during that period of time? Sometimes these offers are called “buyouts” or “windows.”

| □ Yes – ASK 175b |
| □ No  |
| □ Don’t know |

**Skip to Check Item J-13, page 146**

#### b. When is the most recent period during which these special benefits were offered?

<table>
<thead>
<tr>
<th>From</th>
<th>From</th>
</tr>
</thead>
<tbody>
<tr>
<td>Month</td>
<td>Month</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Year</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>19</td>
<td>19</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>To</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Month</td>
<td>Month</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Year</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>19</td>
<td>19</td>
</tr>
</tbody>
</table>

| □ Don’t know | □ Don’t know |
## Section 11C - Husband's Future Pension(s) from Previous Employers - Continued

<table>
<thead>
<tr>
<th>FROM</th>
<th>TO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Month</td>
<td>Month</td>
</tr>
<tr>
<td>Year</td>
<td>Year</td>
</tr>
</tbody>
</table>

### THIRD PENSION PLAN

<table>
<thead>
<tr>
<th>3430</th>
<th>3459</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes - ASK 172c</td>
<td>1. Yes - ASK 172c</td>
</tr>
<tr>
<td>2. No</td>
<td>2. No</td>
</tr>
<tr>
<td>3. Don't know</td>
<td>3. Don't know</td>
</tr>
<tr>
<td>SKIP to 174a</td>
<td>SKIP to 174a</td>
</tr>
</tbody>
</table>

### FOURTH PENSION PLAN

<table>
<thead>
<tr>
<th>3519</th>
<th>3520</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes - ASK 172c</td>
<td>1. Don't know - SKIP to 174a</td>
</tr>
<tr>
<td>2. No</td>
<td></td>
</tr>
<tr>
<td>3. Don't know</td>
<td></td>
</tr>
<tr>
<td>SKIP to 174a</td>
<td></td>
</tr>
</tbody>
</table>

### PERCENT OF PAY

<table>
<thead>
<tr>
<th>3432</th>
<th>3522</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Don't know</td>
<td>1. Don't know</td>
</tr>
</tbody>
</table>

### DOLLARS only

<table>
<thead>
<tr>
<th>3435</th>
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</tr>
</thead>
<tbody>
<tr>
<td>1. Week</td>
<td>1. Week</td>
</tr>
<tr>
<td>2. Biweekly (every two weeks)</td>
<td>2. Biweekly (every two weeks)</td>
</tr>
<tr>
<td>3. Twice a month</td>
<td>3. Twice a month</td>
</tr>
<tr>
<td>4. Month</td>
<td>4. Month</td>
</tr>
<tr>
<td>5. Quarter</td>
<td>5. Quarter</td>
</tr>
<tr>
<td>6. Year</td>
<td>6. Year</td>
</tr>
<tr>
<td>7. Other - Specify</td>
<td>7. Other - Specify</td>
</tr>
<tr>
<td>00</td>
<td>00</td>
</tr>
<tr>
<td>per</td>
<td>per</td>
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</table>

### NUMBER OF YEARS

<table>
<thead>
<tr>
<th>3438</th>
<th>3527</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Don't know</td>
<td>1. Don't know</td>
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### SKIPTO CHECK ITEM J-13, PAGE 146

<table>
<thead>
<tr>
<th>3440</th>
<th>3529</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes - ASK 175b</td>
<td>1. Yes - ASK 175b</td>
</tr>
<tr>
<td>2. No</td>
<td>2. No</td>
</tr>
<tr>
<td>3. Don't know</td>
<td>3. Don't know</td>
</tr>
<tr>
<td>SKIP to Check Item J-13, page 146</td>
<td>SKIP to Check Item J-13, page 146</td>
</tr>
</tbody>
</table>

### Notes

- **Form (SC-31611 17-20-82)**
- **Page 145**
### Section 11C - HUSBAND’S FUTURE PENSION(S) FROM PREVIOUS EMPLOYERS - Continued

**SHOW FLASHCARD J**

**175c. What special benefits were offered?**

Mark (X) all that apply.

<table>
<thead>
<tr>
<th>PGM 4</th>
<th>FIRST PENSION PLAN</th>
<th>PGM 4</th>
<th>SECOND PENSION PLAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>(226)</td>
<td><strong>Lump sum - How much?</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(226A)</td>
<td>$ (Dollars only) (Cents)</td>
<td></td>
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</tr>
<tr>
<td>(227)</td>
<td><strong>Increase in benefits - What percentage?</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(227A)</td>
<td>Percent</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(228)</td>
<td><strong>Credit for extra years of service - How many extra years?</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(228A)</td>
<td>Years</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(229)</td>
<td><strong>Increase in benefits - What amount and time unit?</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(229A)</td>
<td>$ (Dollars only) (Cents) per</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(230)</td>
<td><strong>Benefits begin before they would otherwise have been available - What age will he/she be when benefits begin?</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(230A)</td>
<td>Age</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(231)</td>
<td><strong>Addition of other medical benefits</strong></td>
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</tr>
<tr>
<td>(232)</td>
<td><strong>Other - Specify</strong></td>
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<td></td>
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</table>

**CHECK ITEM J-13**

Refer to item 158, page 136.

Is there more than one plan?

- Yes (2282)
- No (2283)

**NOTES**

* 0 or more plans marked in 158, return to 159a, page 136; omit phrase in brackets and fill in next column
* All others - Includes 1 plan marked in 158, SKIP to Check Item K-1, page 148
* 3 or more plans marked in 158, return to 159a, page 136; omit phrase in brackets and fill in next column
* All others - Includes 2 plans marked in 158, SKIP to Check Item K-1, page 148
<table>
<thead>
<tr>
<th>PGM 4</th>
<th>THIRD PENSION PLAN</th>
<th>PGM 4</th>
<th>FOURTH PENSION PLAN</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>3446</td>
<td>□ Lump sum – How much?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3447</td>
<td>$ (Dollars only) (Cents)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3448</td>
<td>□ Increase in benefits – What percentage?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3449</td>
<td>___________ Percent</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3450</td>
<td>□ Credit for extra years of service – How many extra years?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3451</td>
<td>___________ Years</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3452</td>
<td>□ Increase in benefits – What amount and time unit?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3453</td>
<td>$ (Dollars only) (Cents) per</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3454</td>
<td>(Year, month, etc.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3455</td>
<td>□ Benefits begin before they would otherwise have been available – What age will he be when benefits begin?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3456</td>
<td>Age</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3457</td>
<td>□ Additional or improved medical benefits</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3458</td>
<td>□ Other – Specify</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PGM 10</td>
<td>6120</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PGM 3</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>3459</td>
<td>□ Don’t know</td>
</tr>
</tbody>
</table>

| 3460  | □ 4 or more plans marked in 158, return to 159a, page 136, omit phrase in brackets and fill in next column |
|       | □ All others – Includes 3 plans marked in 158, SKIP to Check Item K-1, page 148 |

| 3459  | □ 6 or more plans marked in 158 – GO to Check Item K-1, page 148 |
|       | □ All others – Includes 4 plans marked in 158, GO to Check Item K-1, page 148 |

NOTES
### Section 12 - HUSBAND’S RETIREMENT HEALTH BENEFITS

#### CHECK ITEM K-1

Refer to R13 on the Information Sheet.

- Is respondent’s husband currently employed?
  - □ Box 1 marked in R13, husband in Labor Force Group A – Go to Check Item K-2
  - □ All others – SKIP to Check Item K-3

#### CHECK ITEM K-2

Refer to item 59c(2), page 48.

- Is box 59c(2) marked to indicate that the husband has a group policy at his CURRENT job or union which covers the husband?
  - □ Yes – ASK 176a
  - □ No – SKIP to Check Item K-3

#### 176a. Does your husband currently make any contribution toward the costs of his employer-provided group health policy to cover the costs of his own health insurance?

- □ Yes
- □ No
- □ Don’t know

#### b. After he retires, do you expect health insurance coverage to be available from your husband’s current employer for your health?

- □ Yes – ASK 176c
- □ No
- □ Don’t know

#### c. After your husband retires, do you expect health insurance coverage to be available from his current employer for yourself?

- □ Yes
- □ No
- □ Don’t know

#### CHECK ITEM K-3

Refer to item 59c(7), page 49.

- Is box 59c(7) marked to indicate that the husband has a group policy at his FORMER job or union which covers the husband?
  - □ Yes – ASK 176d
  - □ No – SKIP to Check Item L-1, page 149

#### 176d. Does your husband currently make any contribution toward the costs of the group health policy provided by his former employer?

- □ Yes
- □ No
- □ Don’t know

#### e. Is your husband retired from this firm?

- □ Yes – Omit phrase “after he retires” in 176f
- □ No – Read phrase “after he retires” in 176f

#### f. (After he retires,) do you expect health insurance coverage to be available from your husband’s former employer for your retirement?

- □ Yes – ASK 176g
- □ No
- □ Don’t know

#### g. (After your husband retires,) do you expect health insurance coverage to be available from his former employer for yourself?

- □ Yes
- □ No
- □ Don’t know

### NOTES
**Section 13 – SOCIAL SECURITY NUMBERS, ATTITUDES AND CONTACT PERSONS**

**CHECK ITEM L-1**
Refer to R8 on the Information Sheet.

<table>
<thead>
<tr>
<th>Question</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>177. What is your Social Security number?</td>
<td>3589</td>
</tr>
<tr>
<td>3592</td>
<td>3593</td>
</tr>
<tr>
<td>3597</td>
<td>Box 1 marked in R8 – ASK 177</td>
</tr>
<tr>
<td></td>
<td>Box 2 is marked in R8 – SKIP to Check Item L-2</td>
</tr>
<tr>
<td></td>
<td>Don’t know</td>
</tr>
<tr>
<td></td>
<td>Refused</td>
</tr>
<tr>
<td></td>
<td>None</td>
</tr>
</tbody>
</table>

**CHECK ITEM L-2**
Refer to R3 on the Information Sheet.

<table>
<thead>
<tr>
<th>Question</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>178. What is your (most recent) husband’s Social Security number?</td>
<td>3594</td>
</tr>
<tr>
<td>3597</td>
<td>3598</td>
</tr>
<tr>
<td>3602</td>
<td>3603</td>
</tr>
<tr>
<td>3607</td>
<td>Very happy</td>
</tr>
<tr>
<td>3608</td>
<td>Somewhat happy</td>
</tr>
<tr>
<td>3609</td>
<td>Somewhat unhappy</td>
</tr>
<tr>
<td>3610</td>
<td>Very unhappy</td>
</tr>
</tbody>
</table>

**179. We are interested in the way people are feeling these days.**
Taking things altogether, would you say you’re very happy, somewhat happy, somewhat unhappy, or very unhappy these days?
Mark (X) only one category.

**180. Please give us the names and addresses of two persons who would always know where you could be reached even if you moved away.**
If same person(s), update the information in items 14 and 15 on the LGT-1D.
If new person(s) mentioned, enter the information in items 14 through 17 that are not completed or in the margin of the LGT-1D.

Refer to R3 on the Information Sheet. If Box 1, “Married, spouse present is marked, include “and your husband” phrase.

**181. May I call you (and your husband) if after checking my work at home I need to ask a few additional questions that I may have missed?**
Record response in “Notes” section below.

END INTERVIEW. THANK RESPONDENT FOR HER/HIS PARTICIPATION.

**OFFICE USE ONLY**

<table>
<thead>
<tr>
<th>Code</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>3600</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Code</th>
<th>County</th>
</tr>
</thead>
<tbody>
<tr>
<td>3601</td>
<td></td>
</tr>
</tbody>
</table>
### INFORMATION SHEET

#### Part A - FIELD REPRESENTATIVE TRANSCRIPTION ITEMS

Transcribe from Household Record Card (LGT-10), Item 7.

**R3. Current marital status**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Married, spouse present</td>
</tr>
<tr>
<td>2</td>
<td>Married, spouse absent</td>
</tr>
<tr>
<td>3</td>
<td>Widowed</td>
</tr>
<tr>
<td>4</td>
<td>Divorced</td>
</tr>
<tr>
<td>5</td>
<td>Separated</td>
</tr>
<tr>
<td>6</td>
<td>Never married</td>
</tr>
</tbody>
</table>

#### Part B - PAST TRANSCRIPTION ITEMS - Continued

**R9. Respondent’s Place of Birth Check**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Ask for respondent’s place of birth</td>
</tr>
<tr>
<td>2</td>
<td>Do not ask for respondent’s place of birth</td>
</tr>
</tbody>
</table>

#### Part C - 1992 QUESTIONNAIRE TRANSCRIPTION

**R10. Respondent’s current labor force group**

(Information from items 1, 2a, 3a, page 3 and 4a, page 4)

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Labor Force Group A (“WK” or “J” in 1 or “Yes” in 2a or 3a)</td>
</tr>
<tr>
<td>2</td>
<td>Labor Force Group B (“LK” in 1 or “Yes” in 4a)</td>
</tr>
<tr>
<td>3</td>
<td>Labor Force Group C (All others)</td>
</tr>
</tbody>
</table>

**R11. Date respondent last worked**

(Information from item 5, page 4)

<table>
<thead>
<tr>
<th>Month</th>
<th>Day</th>
<th>Year</th>
</tr>
</thead>
</table>

**R12. Class of worker for respondent**

(Information from item 9c, page 6)

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>P (Private)</td>
</tr>
<tr>
<td>2</td>
<td>G (Government)</td>
</tr>
<tr>
<td>3</td>
<td>O (Own business)</td>
</tr>
<tr>
<td>4</td>
<td>WP (Working without pay)</td>
</tr>
</tbody>
</table>

**R13. Husband’s current labor force group**

(Information from items 109, 110a, and 111a, page 88)

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Labor Force Group A (“WK” in 109 or “Yes” in 110a or 111a)</td>
</tr>
</tbody>
</table>

### NOTES