

Phone: Pensions

For more information on the Pensions Module see Appendix Q - Cor935.

OVERVIEW

The sibling spouse pension questions mirror those asked of the siblings. The section begins with the types of retirement plans that the spouses own, then follows by asking whether any benefits are being received from these plans. If they were not, eligibility age and expected benefit level are collected. (If the spouses were currently receiving benefits, this information was collected in the income module.)

As in the sibling interview, unfolding brackets followed questions asking for dollar amounts in this section. Associated with these items are four variables (identified by the eight characters of the variable name) detailing the information collected in the bracketing sequence. The character "b" is associated with a summary variable, "u" and "l" denote the upper and lower bounds and "e" indicates the entry point into the bracketing sequence.

During the interview, interviewers had a chance to leave notes with additional information obtained from the respondents. The WLS staff reviewed and processed these notes using a standardized set of decision rules for each section. In many cases processing the notes resulted in changes to the coded responses which created inconsistencies in the skip pattern of the CASES instrument. While we put considerable effort into adjusting such discrepancies, we could not eliminate them all. Occasionally, notes indicated problematic cases due to the lack of specific information or, conversely, cases that contained extra information that was important enough to retain. In such instances we created a flag, identified by the character "f" and attached it to the variable name, for the affected variable.

BRIEF VARIABLE DESCRIPTIONS

| | |
|-----------------|-------------------------------|
| BT001RE-BT006RE | Type of pension plans |
| BT007RE-BT011RE | Current and expected benefits |

bt001re: Besides Social Security, do you yourself have any pension or retirement plans, including those you became eligible for through your spouse?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone
Source variables: h_b210, h_emp14, h_b220_a

| Value | Label | Frequencies | | |
|-------|-------------------|-------------|--------|-------|
| | | Male | Female | Total |
| -5 | PARTIAL INTERVIEW | 9 | 5 | 14 |
| -4 | NOT ASCERTAINED | 0 | 1 | 1 |
| -3 | REFUSED | 4 | 3 | 7 |
| -1 | DON'T KNOW | 1 | 3 | 4 |
| 1 | YES | 836 | 908 | 1744 |
| 2 | NO | 96 | 259 | 355 |

bt002re: Did Sibling Spouse Respondent report employer provided pensions?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone

Source variables: h_b210, h_emp14, h_b220_a, h_b220_b, h_b220_c, h_b220_d, h_b220_e, h_b220_f

| Value | Label | Frequencies | | |
|-------|-------------------------------------------|-------------|--------|-------|
| | | Male | Female | Total |
| -5 | PARTIAL INTERVIEW | 9 | 5 | 14 |
| -4 | NOT ASCERTAINED | 2 | 1 | 3 |
| -3 | REFUSED | 1 | 8 | 9 |
| -2 | INAPPROPRIATE INAP/NO RETIREMENT PLANS | 101 | 265 | 366 |
| -1 | DON'T KNOW | 1 | 6 | 7 |
| 1 | YES | 497 | 407 | 904 |
| 2 | NO | 335 | 487 | 822 |

bt003re: Did Sibling Spouse Respondent report IRAs or Keogh plans?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone

Source variables: h_b210, h_emp14, h_b220_a, h_b220_b, h_b220_c, h_b220_d, h_b220_e, h_b220_f

| Value | Label | Frequencies | | |
|-------|-------------------------------------------|-------------|--------|-------|
| | | Male | Female | Total |
| -5 | PARTIAL INTERVIEW | 9 | 5 | 14 |
| -4 | NOT ASCERTAINED | 2 | 1 | 3 |
| -3 | REFUSED | 1 | 8 | 9 |
| -2 | INAPPROPRIATE INAP/NO RETIREMENT PLANS | 101 | 265 | 366 |
| -1 | DON'T KNOW | 1 | 6 | 7 |
| 1 | YES | 392 | 464 | 856 |
| 2 | NO | 440 | 430 | 870 |

bt004re: Did Sibling Spouse Respondent report 401k or 403b plans?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone

Source variables: h_b210, h_emp14, h_b220_a, h_b220_b, h_b220_c, h_b220_d, h_b220_e, h_b220_f

| Value | Label | Frequencies | | |
|-------|-------------------------------------------|-------------|--------|-------|
| | | Male | Female | Total |
| -5 | PARTIAL INTERVIEW | 9 | 5 | 14 |
| -4 | NOT ASCERTAINED | 2 | 1 | 3 |
| -3 | REFUSED | 1 | 8 | 9 |
| -2 | INAPPROPRIATE INAP/NO RETIREMENT PLANS | 101 | 265 | 366 |
| -1 | DON'T KNOW | 1 | 6 | 7 |
| 1 | YES | 318 | 358 | 676 |
| 2 | NO | 514 | 536 | 1050 |

bt005re: Did Sibling Spouse Respondent report annuities?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone

Source variables: h_b210, h_emp14, h_b220_a, h_b220_b, h_b220_c, h_b220_d, h_b220_e, h_b220_f

| Value | Label | Frequencies | | |
|-------|-------------------------------------------|-------------|--------|-------|
| | | Male | Female | Total |
| -5 | PARTIAL INTERVIEW | 9 | 5 | 14 |
| -4 | NOT ASCERTAINED | 2 | 1 | 3 |
| -3 | REFUSED | 1 | 8 | 9 |
| -2 | INAPPROPRIATE INAP/NO RETIREMENT PLANS | 101 | 265 | 366 |
| -1 | DON'T KNOW | 1 | 6 | 7 |
| 1 | YES | 133 | 160 | 293 |
| 2 | NO | 699 | 734 | 1433 |

bt006re: Did Sibling Spouse Respondent report any other type of pension or retirement plan?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone

Source variables: h_b210, h_emp14, h_b220_a, h_b220_b, h_b220_c, h_b220_d, h_b220_e, h_b220_f

| Value | Label | Frequencies | | |
|-------|-------------------------------------------|-------------|--------|-------|
| | | Male | Female | Total |
| -5 | PARTIAL INTERVIEW | 9 | 5 | 14 |
| -4 | NOT ASCERTAINED | 2 | 1 | 3 |
| -3 | REFUSED | 1 | 8 | 9 |
| -2 | INAPPROPRIATE INAP/NO RETIREMENT PLANS | 101 | 265 | 366 |
| -1 | DON'T KNOW | 1 | 6 | 7 |
| 1 | YES | 192 | 156 | 348 |
| 2 | NO | 640 | 738 | 1378 |

bt007re: Are you currently receiving payments from any of these plans?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone

Source variables: h_b230, h_b210, h_emp14, h_b220_a

| Value | Label | Frequencies | | |
|-------|-------------------------------------------|-------------|--------|-------|
| | | Male | Female | Total |
| -5 | PARTIAL INTERVIEW | 9 | 5 | 14 |
| -3 | REFUSED | 4 | 6 | 10 |
| -2 | INAPPROPRIATE INAP/NO RETIREMENT PLANS | 101 | 265 | 366 |
| -1 | DON'T KNOW | 0 | 4 | 4 |
| 1 | YES | 499 | 267 | 766 |
| 2 | NO | 333 | 632 | 965 |

bt008re: Do you have any retirement plans from which you are NOT currently receiving benefits?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone
Source variables: h_b240, h_b230, h_b210, h_emp14, h_b220_a

| Value | Label | Frequencies | | |
|-------|-------------------------------------------|-------------|--------|-------|
| | | Male | Female | Total |
| -5 | PARTIAL INTERVIEW | 9 | 5 | 14 |
| -3 | REFUSED | 4 | 5 | 9 |
| -2 | INAPPROPRIATE INAP/NO RETIREMENT PLANS | 101 | 265 | 366 |
| -1 | DON'T KNOW | 2 | 1 | 3 |
| 1 | YES | 475 | 756 | 1231 |
| 2 | NO | 355 | 147 | 502 |

bt009re: What is the earliest AGE at which you were or would be eligible for these benefits?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone
Source variables: h_b250, h_b240, h_b230, h_b210, h_emp14, h_b220_a

| Value | Label | Frequencies | | |
|---------|----------------------------------|-------------|--------|-------|
| | | Male | Female | Total |
| -5 | PARTIAL INTERVIEW | 9 | 5 | 14 |
| -4 | NOT ASCERTAINED | 4 | 0 | 4 |
| -3 | REFUSED | 0 | 1 | 1 |
| -2 | INAPPROPRIATE INAP | 462 | 418 | 880 |
| -1 | DON'T KNOW | 22 | 90 | 112 |
| 1 | NOW/AT ANY AGE / WHENEVER I WANT | 66 | 74 | 140 |
| 39 - 59 | | 152 | 215 | 367 |
| 60 - 62 | | 117 | 175 | 292 |
| 63 - 68 | | 75 | 121 | 196 |
| 69 - 82 | | 39 | 80 | 119 |

bt010re: Amount for: About how much do you EXPECT to receive from these plans when you start receiving benefits? //Bracketed//

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone
 Source variables: h_b260_1, h_b250, h_b240, h_b230, h_b210, h_emp14, h_b220_a

| Value | Label | Frequencies | | |
|----------------------|---------------------------------------------------------------|-------------|--------|-------|
| | | Male | Female | Total |
| -5 | PARTIAL INTERVIEW | 9 | 5 | 14 |
| -4 | NOT ASCERTAINED | 2 | 1 | 3 |
| -3 | REFUSED | 21 | 25 | 46 |
| -2 | INAPPROPRIATE INAP/NO PLANS/RECEIVING BENEFITS FROM ALL | 462 | 418 | 880 |
| -1 | DON'T KNOW | 166 | 467 | 633 |
| 0 - 700 | | 41 | 77 | 118 |
| 730 - 1800 | | 47 | 64 | 111 |
| 2000 - 4000 | | 67 | 56 | 123 |
| 4200 - 40000 | | 69 | 44 | 113 |
| 45000 - 5,000,000 | | 62 | 22 | 84 |

bt011re: Unit for: About how much do you EXPECT to receive from these plans when you start receiving benefits?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone
Source variables: h_b260_2, h_b250, h_b240, h_b230, h_b210, h_emp14, h_b220_a

| Value | Label | Frequencies | | |
|-------|-----------------------|-------------|--------|-------|
| | | Male | Female | Total |
| -5 | PARTIAL INTERVIEW | 9 | 5 | 14 |
| -4 | NOT ASCERTAINED | 18 | 80 | 98 |
| -2 | INAPPROPRIATE INAP | 636 | 833 | 1469 |
| 1 | PER MONTH | 159 | 186 | 345 |
| 2 | PER YEAR | 97 | 36 | 133 |
| 3 | PERCENTAGE OF PAY | 1 | 3 | 4 |
| 4 | TOTAL SUM OF BENEFIT | 16 | 24 | 40 |
| 5 | LUMP SUM | 9 | 12 | 21 |
| 7 | SOMETHING ELSE | 1 | 0 | 1 |

bt010reb: Response summary for: About how much do you EXPECT to receive from these plans when you start receiving benefits?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone
Source variables: h_b260_1, h_b250, h_b240, h_b230, h_b210, h_emp14, h_b220_a

| Value | Label | Frequencies | | |
|-------|----------------------------------------|-------------|--------|-------|
| | | Male | Female | Total |
| -9 | ITEM NOT ON PATH | 462 | 418 | 880 |
| -5 | PARTIAL INTERVIEW - QUESTION NOT ASKED | 9 | 5 | 14 |
| -4 | AMOUNT NOT ASCERTAINED | 2 | 1 | 3 |
| 0 | NO INFO IN BRACKETING | 313 | 379 | 692 |
| 1 | PARTIAL INFO IN BRACKETING | 32 | 69 | 101 |
| 2 | COMPLETE INFO IN BRACKETING | 128 | 307 | 435 |

bt010rel: Bracket lower bound for: About how much do you EXPECT to receive from these plans when you start receiving benefits?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone
 Source variables: h_b260_1, h_b250, h_b240, h_b230, h_b210, h_emp14, h_b220_a

| Frequencies | | | | |
|--------------------|-----------------------|-------------|---------------|--------------|
| Value | Label | Male | Female | Total |
| -5 | PARTIAL INTERVIEW | 9 | 5 | 14 |
| -2 | INAPPROPRIATE INAP | 748 | 681 | 1429 |
| 0 | | 47 | 231 | 278 |
| 500 | | 38 | 101 | 139 |
| 1000 | | 35 | 102 | 137 |
| 2000 | | 43 | 50 | 93 |
| 4000 | | 26 | 9 | 35 |

bt010reu: Bracket upper bound for: About how much do you EXPECT to receive from these plans when you start receiving benefits?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone
 Source variables: h_b260_1, h_b250, h_b240, h_b230, h_b210, h_emp14, h_b220_a

| Frequencies | | | | |
|--------------------|-----------------------|-------------|---------------|--------------|
| Value | Label | Male | Female | Total |
| . | System missing - NR | 81 | 166 | 247 |
| -5 | PARTIAL INTERVIEW | 9 | 5 | 14 |
| -2 | INAPPROPRIATE INAP | 748 | 681 | 1429 |
| 500 | | 21 | 108 | 129 |
| 1000 | | 35 | 107 | 142 |
| 2000 | | 25 | 86 | 111 |
| 4000 | | 27 | 26 | 53 |

bt010ree: Bracketing entry point for: About how much do you EXPECT to receive from these plans when you start receiving benefits?

Data source: Sibling Spouse Respondent Collected in: 2005 Mode: phone

Source variables: h_b260_1, h_b250, h_b240, h_b230, h_b210, h_emp14, h_b220_a

| Value | Label | Frequencies | | |
|-------|-----------------------|-------------|--------|-------|
| | | Male | Female | Total |
| -5 | PARTIAL INTERVIEW | 9 | 5 | 14 |
| -2 | INAPPROPRIATE INAP | 746 | 675 | 1421 |
| 500 | | 66 | 186 | 252 |
| 1000 | | 66 | 179 | 245 |
| 2000 | | 59 | 134 | 193 |

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