



Income Statistics Division

Survey of Financial Security - 2005

Confidential when completed

Collected under the authority of the Statistics Act, Revised Statutes of Canada, 1985, Chapter S19.

Si vous préférez ce questionnaire en français, veuillez cocher

While participation in this survey is voluntary, your cooperation is important to ensure that the information collected in this survey is as accurate and as comprehensive as possible.

PLACE LABEL HERE

If no label is present code questionnaire ID below

Questionnaire ID					
		-			-

For Statistics Canada use only

M	F	L	STAT
<input type="radio"/>	<input type="radio"/>	1	

Does more than one family or unattached individual live at this address?

A family is all persons related by blood, marriage, common-law, adoption, foster and guardianship.

- 1 Yes → a separate questionnaire for each family or unattached individual.
- 2 No → Use only one questionnaire

If the address above is not correct, cross out only the incorrect information and enter the required corrections below.

Household Contact

Street

Telephone Number

Area Code

City

Province

Postal Code

8-5400-70.1: 2004-11-10 STC/ISD-047-75117

Enter the person ID, first name and age for each person 15 or older as reported in A3.

If more than six people 15 or over are reported in A3, select the six oldest.

Person ID

Person ID

First Name

Age

First Name

Age

A Family composition

A1. (a) What are the names of all family members who usually live here?

List the reference person first. The reference person is the adult mainly responsible for the financial support of the family. If two or more people share this responsibility, choose one.

(b) Are any other family members staying here temporarily that have no other usual residence?

Add a person only if he/she has no other usual residence.

(c) Are there any other family members who usually live here but are now away at school, in hospital or somewhere else?

A2. What is ...'s date of birth?

A3. Then ... is (years old)?

A4. Enter ...'s sex.

Person ID (Used at top of the page)	Last Name	First Name	Day	Month	Year	Enter age	Mark sex
01	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1 <input type="radio"/> Male 2 <input type="radio"/> Female
02	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1 <input type="radio"/> Male 2 <input type="radio"/> Female
03	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1 <input type="radio"/> Male 2 <input type="radio"/> Female
04	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1 <input type="radio"/> Male 2 <input type="radio"/> Female
05	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1 <input type="radio"/> Male 2 <input type="radio"/> Female
06	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1 <input type="radio"/> Male 2 <input type="radio"/> Female
07	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1 <input type="radio"/> Male 2 <input type="radio"/> Female
08	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1 <input type="radio"/> Male 2 <input type="radio"/> Female

A Family composition

A5. What is ...'s current marital status? 01 Married 02 Living common-law 03 Separated 04 Divorced 05 Widowed 06 Single, never married	A6. During the past 3 years, has ...'s marital status changed?	A7. What is ...'s relationship to ... (reference person)? 01 Reference person 02 Spouse/partner (including same-sex partner) 03 Son or daughter 04 Step-son/daughter or partner's son/daughter 05 Grandchild 06 Son-in-law or daughter-in-law 07 Foster child (under 18 years) 08 Parent 09 Parent-in-law 10 Brother or sister 11 Grandparent 12 Other relative 13 Non-relative	A8. At the beginning of the year, what was ...'s main activity? 01 Working at a job or business or self-employed? 02 Looking for work? 03 Going to school (full time)? 04 Keeping house? 05 Caring for other family members including young children? 06 Retired? 07 Long term illness or disability? 08 Doing volunteer work? 09 No main activity? 10 Other (specify in comment section)
Enter code	Check	Enter code	Enter code
□□	1 <input type="radio"/> Yes 2 <input type="radio"/> No	□□	□□
□□	1 <input type="radio"/> Yes 2 <input type="radio"/> No	□□	□□
□□	1 <input type="radio"/> Yes 2 <input type="radio"/> No	□□	□□
□□	1 <input type="radio"/> Yes 2 <input type="radio"/> No	□□	□□
□□	1 <input type="radio"/> Yes 2 <input type="radio"/> No	□□	□□
□□	1 <input type="radio"/> Yes 2 <input type="radio"/> No	□□	□□
□□	1 <input type="radio"/> Yes 2 <input type="radio"/> No	□□	□□
□□	1 <input type="radio"/> Yes 2 <input type="radio"/> No	□□	□□



Are there more than 8 persons? Yes → Continue on the next page
 No → Transcribe the person ID, first name and age of those 15+ to the top of the page, then go to Section B

A Family composition

A1. (a) What are the names of all family members who usually live here?
List the reference person first. The reference person is the adult mainly responsible for the financial support of the family. If two or more people share this responsibility, choose one.

(b) Are any other family members staying here temporarily that have no other usual residence?
Add a person only if he/she has no other usual residence.

(c) Are there any other family members who usually live here but are now away at school, in hospital or somewhere else?

A2. What is ...'s date of birth?

A3. Then ... is (years old)?

A4. Enter ...'s sex.

Person ID (Used at top of the page)	Last Name	First Name	Day	Month	Year	Enter age	Mark sex
09	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1 <input type="radio"/> Male 2 <input type="radio"/> Female
10	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1 <input type="radio"/> Male 2 <input type="radio"/> Female
11	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1 <input type="radio"/> Male 2 <input type="radio"/> Female
12	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1 <input type="radio"/> Male 2 <input type="radio"/> Female
13	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1 <input type="radio"/> Male 2 <input type="radio"/> Female
14	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1 <input type="radio"/> Male 2 <input type="radio"/> Female
15	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1 <input type="radio"/> Male 2 <input type="radio"/> Female
16	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1 <input type="radio"/> Male 2 <input type="radio"/> Female

A Family composition

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Enter code	Check	Enter code	Enter code
□ □	1 <input type="radio"/> Yes 2 <input type="radio"/> No	□ □	□ □
□ □	1 <input type="radio"/> Yes 2 <input type="radio"/> No	□ □	□ □
□ □	1 <input type="radio"/> Yes 2 <input type="radio"/> No	□ □	□ □
□ □	1 <input type="radio"/> Yes 2 <input type="radio"/> No	□ □	□ □
□ □	1 <input type="radio"/> Yes 2 <input type="radio"/> No	□ □	□ □
□ □	1 <input type="radio"/> Yes 2 <input type="radio"/> No	□ □	□ □
□ □	1 <input type="radio"/> Yes 2 <input type="radio"/> No	□ □	□ □
□ □	1 <input type="radio"/> Yes 2 <input type="radio"/> No	□ □	□ □
(Empty space for comments or additional information)			

B Socio-cultural information

The next few questions are about your citizenship and language learned.

B1. What is the language that ... first learned at home in childhood and still understands?

If this person no longer understands the first language learned, indicate the second language learned.

- 1 English
 2 French
 3 Both English and French
 4 Other - Specify

- 1 English
 2 French
 3 Both English and French
 4 Other - Specify

B2. Of what country(ies) is ... a citizen?

Indicate all citizenships held.

- 1 Canada
 2 Other country (countries) → Go to B4
 3 Canada and other country (countries)

- 1 Canada
 2 Other country (countries) → Go to B4
 3 Canada and other country (countries)

B3. Is ... Canadian by birth or by naturalization?

'Canadian by naturalization' refers to the process by which an immigrant is granted citizenship of Canada under the Citizenship Act.

- 1 By birth → Go to next person/ Section C
 2 By naturalization

- 1 By birth → Go to next person/ Section C
 2 By naturalization

B4. In what year did ... first come to Canada to live?

Year

Year

B5. Is ... now, or has ... ever been a landed immigrant?

- 1 Yes
 2 No → Go to next person/ Section C

- 1 Yes
 2 No → Go to next person/ Section C

B6. In what year did ... first become a landed immigrant?

Year

Year

<p>1 <input type="radio"/> English</p> <p>2 <input type="radio"/> French</p> <p>3 <input type="radio"/> Both English and French</p> <p>4 <input type="radio"/> Other - Specify</p> <div style="border: 1px solid black; height: 60px; width: 100%;"></div>	<p>1 <input type="radio"/> English</p> <p>2 <input type="radio"/> French</p> <p>3 <input type="radio"/> Both English and French</p> <p>4 <input type="radio"/> Other - Specify</p> <div style="border: 1px solid black; height: 60px; width: 100%;"></div>	<p>1 <input type="radio"/> English</p> <p>2 <input type="radio"/> French</p> <p>3 <input type="radio"/> Both English and French</p> <p>4 <input type="radio"/> Other - Specify</p> <div style="border: 1px solid black; height: 60px; width: 100%;"></div>	<p>1 <input type="radio"/> English</p> <p>2 <input type="radio"/> French</p> <p>3 <input type="radio"/> Both English and French</p> <p>4 <input type="radio"/> Other - Specify</p> <div style="border: 1px solid black; height: 60px; width: 100%;"></div>
<p>1 <input type="radio"/> Canada</p> <p>2 <input type="radio"/> Other country (countries) → Go to B4</p> <p>3 <input type="radio"/> Canada and other country (countries)</p>	<p>1 <input type="radio"/> Canada</p> <p>2 <input type="radio"/> Other country (countries) → Go to B4</p> <p>3 <input type="radio"/> Canada and other country (countries)</p>	<p>1 <input type="radio"/> Canada</p> <p>2 <input type="radio"/> Other country (countries) → Go to B4</p> <p>3 <input type="radio"/> Canada and other country (countries)</p>	<p>1 <input type="radio"/> Canada</p> <p>2 <input type="radio"/> Other country (countries) → Go to B4</p> <p>3 <input type="radio"/> Canada and other country (countries)</p>
<p>1 <input type="radio"/> By birth → Go to next person/ Section C</p> <p>2 <input type="radio"/> By naturalization</p>	<p>1 <input type="radio"/> By birth → Go to next person/ Section C</p> <p>2 <input type="radio"/> By naturalization</p>	<p>1 <input type="radio"/> By birth → Go to next person/ Section C</p> <p>2 <input type="radio"/> By naturalization</p>	<p>1 <input type="radio"/> By birth → Go to Section C</p> <p>2 <input type="radio"/> By naturalization</p>
Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → Go to next person/ Section C</p>	<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → Go to next person/ Section C</p>	<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → Go to next person/ Section C</p>	<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → Go to Section C</p>
Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

C Activity limitations & health

The next few questions deal with health.

C1. Compared to other people his/her age, how would you describe ...'s state of health? Would you say it is . . .

- 1 Excellent
- 2 Very Good
- 3 Good
- 4 Fair
- 5 Poor

- 1 Excellent
- 2 Very Good
- 3 Good
- 4 Fair
- 5 Poor

C2. Does ... have any difficulty hearing, seeing, communicating, walking, climbing stairs, bending, learning or doing any similar activities?

- 1 Yes, sometimes
- 2 Yes, often
- 3 No

- 1 Yes, sometimes
- 2 Yes, often
- 3 No

C3. Does a physical condition, mental condition or health problem reduce the amount or the kind of activity ... can do.

(a) at home?

- 1 Yes, sometimes
- 2 Yes, often
- 3 No

- 1 Yes, sometimes
- 2 Yes, often
- 3 No

(b) at school or work?

- 1 Yes, sometimes
- 2 Yes, often
- 3 No
- 4 Not applicable

- 1 Yes, sometimes
- 2 Yes, often
- 3 No
- 4 Not applicable

(c) in other activities for example transportation or leisure?

- 1 Yes, sometimes
- 2 Yes, often
- 3 No

- 1 Yes, sometimes
- 2 Yes, often
- 3 No

<p>1 <input type="radio"/> Excellent</p> <p>2 <input type="radio"/> Very Good</p> <p>3 <input type="radio"/> Good</p> <p>4 <input type="radio"/> Fair</p> <p>5 <input type="radio"/> Poor</p>	<p>1 <input type="radio"/> Excellent</p> <p>2 <input type="radio"/> Very Good</p> <p>3 <input type="radio"/> Good</p> <p>4 <input type="radio"/> Fair</p> <p>5 <input type="radio"/> Poor</p>	<p>1 <input type="radio"/> Excellent</p> <p>2 <input type="radio"/> Very Good</p> <p>3 <input type="radio"/> Good</p> <p>4 <input type="radio"/> Fair</p> <p>5 <input type="radio"/> Poor</p>	<p>1 <input type="radio"/> Excellent</p> <p>2 <input type="radio"/> Very Good</p> <p>3 <input type="radio"/> Good</p> <p>4 <input type="radio"/> Fair</p> <p>5 <input type="radio"/> Poor</p>
<p>1 <input type="radio"/> Yes, sometimes</p> <p>2 <input type="radio"/> Yes, often</p> <p>3 <input type="radio"/> No</p>	<p>1 <input type="radio"/> Yes, sometimes</p> <p>2 <input type="radio"/> Yes, often</p> <p>3 <input type="radio"/> No</p>	<p>1 <input type="radio"/> Yes, sometimes</p> <p>2 <input type="radio"/> Yes, often</p> <p>3 <input type="radio"/> No</p>	<p>1 <input type="radio"/> Yes, sometimes</p> <p>2 <input type="radio"/> Yes, often</p> <p>3 <input type="radio"/> No</p>
<p>1 <input type="radio"/> Yes, sometimes</p> <p>2 <input type="radio"/> Yes, often</p> <p>3 <input type="radio"/> No</p> <p>1 <input type="radio"/> Yes, sometimes</p> <p>2 <input type="radio"/> Yes, often</p> <p>3 <input type="radio"/> No</p> <p>4 <input type="radio"/> Not applicable</p> <p>1 <input type="radio"/> Yes, sometimes</p> <p>2 <input type="radio"/> Yes, often</p> <p>3 <input type="radio"/> No</p>	<p>1 <input type="radio"/> Yes, sometimes</p> <p>2 <input type="radio"/> Yes, often</p> <p>3 <input type="radio"/> No</p> <p>1 <input type="radio"/> Yes, sometimes</p> <p>2 <input type="radio"/> Yes, often</p> <p>3 <input type="radio"/> No</p> <p>4 <input type="radio"/> Not applicable</p> <p>1 <input type="radio"/> Yes, sometimes</p> <p>2 <input type="radio"/> Yes, often</p> <p>3 <input type="radio"/> No</p>	<p>1 <input type="radio"/> Yes, sometimes</p> <p>2 <input type="radio"/> Yes, often</p> <p>3 <input type="radio"/> No</p> <p>1 <input type="radio"/> Yes, sometimes</p> <p>2 <input type="radio"/> Yes, often</p> <p>3 <input type="radio"/> No</p> <p>4 <input type="radio"/> Not applicable</p> <p>1 <input type="radio"/> Yes, sometimes</p> <p>2 <input type="radio"/> Yes, often</p> <p>3 <input type="radio"/> No</p>	<p>1 <input type="radio"/> Yes, sometimes</p> <p>2 <input type="radio"/> Yes, often</p> <p>3 <input type="radio"/> No</p> <p>1 <input type="radio"/> Yes, sometimes</p> <p>2 <input type="radio"/> Yes, often</p> <p>3 <input type="radio"/> No</p> <p>4 <input type="radio"/> Not applicable</p> <p>1 <input type="radio"/> Yes, sometimes</p> <p>2 <input type="radio"/> Yes, often</p> <p>3 <input type="radio"/> No</p>

D Education

D1. What degrees, certificates or diplomas has ... completed? *Mark all that apply.*

- 01 No degrees, certificates or diplomas
- 02 Secondary (high) school diploma or equivalent
- 03 Trade/vocational certificate
- 04 Apprenticeship certificate
- 05 Community college, CEGEP or nursing school diploma
- 06 University certificate or diploma below Bachelor's
- 07 Bachelor's degree (B.A., B.Sc., B.Ed.)
- 08 University degree, certificate or diploma above a Bachelor's (LL.B., M.D., D.D.S., D.M.D., D.V.M., O.D., M.A., M.Sc., M.Ed., Ph.D., D.Sc., D.Ed.)
- 09 Other - *specify*

- 01 No degrees, certificates or diplomas
- 02 Secondary (high) school diploma or equivalent
- 03 Trade/vocational certificate
- 04 Apprenticeship certificate
- 05 Community college, CEGEP or nursing school diploma
- 06 University certificate or diploma below Bachelor's
- 07 Bachelor's degree (B.A., B.Sc., B.Ed.)
- 08 University degree, certificate or diploma above a Bachelor's (LL.B., M.D., D.D.S., D.M.D., D.V.M., O.D., M.A., M.Sc., M.Ed., Ph.D., D.Sc., D.Ed.)
- 09 Other - *specify*

D2. In which year did ... obtain his/her latest degree, certificate or diploma?

Year

Year

- 01 No degrees, certificates or diplomas
- 02 Secondary (high) school diploma or equivalent
- 03 Trade/vocational certificate
- 04 Apprenticeship certificate
- 05 Community college, CEGEP or nursing school diploma
- 06 University certificate or diploma below Bachelor's
- 07 Bachelor's degree (B.A., B.Sc., B.Ed.)
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- 09 Other - *specify*

Year

- 01 No degrees, certificates or diplomas
- 02 Secondary (high) school diploma or equivalent
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- 09 Other - *specify*

Year

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- 09 Other - *specify*

Year

- 01 No degrees, certificates or diplomas
- 02 Secondary (high) school diploma or equivalent
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- 09 Other - *specify*

Year

E Current labour force characteristics

Now a few questions on your (and your family's) current employment.

E1. Is ... currently working at a job or business?

- 1 Yes → Go to E3
2 No

- 1 Yes → Go to E3
2 No

E2. Does ... have a job or business but has been absent or not working?

- 1 Yes
2 No → Go to next person/ Section F

- 1 Yes
2 No → Go to next person/ Section F

The next few questions are about ...'s current main job. The main job is the one for which this person currently works the greatest number of hours per week. If two jobs have equal hours, select the job with the highest pay.

E3. In this job or business, is ... mainly :

- 1 Working for wages, salary, tips or commissions → Go to E5
2 Working without pay for his/her spouse or another relative in a family business or farm → Go to E5
3 Self employed without paid help (alone or in partnership)
4 Self employed with paid help (alone or in partnership)

- 1 Working for wages, salary, tips or commissions → Go to E5
2 Working without pay for his/her spouse or another relative in a family business or farm → Go to E5
3 Self employed without paid help (alone or in partnership)
4 Self employed with paid help (alone or in partnership)

E4. If self-employed, was ...'s farm or business incorporated?

- 1 Yes
2 No

- 1 Yes
2 No

E5. For whom does ... work?

For self-employed persons, enter the name of their business. If the business does not have a name, enter the person's name. Enter name of firm, government agency, etc, as well as the section, plant department, if applicable.

<p>1 <input type="radio"/> Yes → Go to E3</p> <p>2 <input type="radio"/> No</p>	<p>1 <input type="radio"/> Yes → Go to E3</p> <p>2 <input type="radio"/> No</p>	<p>1 <input type="radio"/> Yes → Go to E3</p> <p>2 <input type="radio"/> No</p>	<p>1 <input type="radio"/> Yes → Go to E3</p> <p>2 <input type="radio"/> No</p>												
<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → Go to next person/ Section F</p>	<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → Go to next person/ Section F</p>	<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → Go to next person/ Section F</p>	<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → Go to Section F</p>												
<p>FOR INFORMATION ONLY</p>															
<p>1 <input type="radio"/> Working for wages, salary, tips or commissions → Go to E5</p> <p>2 <input type="radio"/> Working without pay for his/her spouse or another relative in a family business or farm → Go to E5</p> <p>3 <input type="radio"/> Self employed without paid help (alone or in partnership)</p> <p>4 <input type="radio"/> Self employed with paid help (alone or in partnership)</p>	<p>1 <input type="radio"/> Working for wages, salary, tips or commissions → Go to E5</p> <p>2 <input type="radio"/> Working without pay for his/her spouse or another relative in a family business or farm → Go to E5</p> <p>3 <input type="radio"/> Self employed without paid help (alone or in partnership)</p> <p>4 <input type="radio"/> Self employed with paid help (alone or in partnership)</p>	<p>1 <input type="radio"/> Working for wages, salary, tips or commissions → Go to E5</p> <p>2 <input type="radio"/> Working without pay for his/her spouse or another relative in a family business or farm → Go to E5</p> <p>3 <input type="radio"/> Self employed without paid help (alone or in partnership)</p> <p>4 <input type="radio"/> Self employed with paid help (alone or in partnership)</p>	<p>1 <input type="radio"/> Working for wages, salary, tips or commissions → Go to E5</p> <p>2 <input type="radio"/> Working without pay for his/her spouse or another relative in a family business or farm → Go to E5</p> <p>3 <input type="radio"/> Self employed without paid help (alone or in partnership)</p> <p>4 <input type="radio"/> Self employed with paid help (alone or in partnership)</p>												
<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No</p>	<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No</p>	<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No</p>	<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No</p>												
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<p>E6. What kind of business, industry or service is this? <i>For example, wheat farm, road maintenance, retail shoe store, secondary school.</i></p>	<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									
<p>E7. What kind of work does ... do? <i>For example, medical lab technician, accounting clerk, secondary school teacher, supervisor of data entry unit, food processing labourer.</i></p>	<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									
<p>E8. In this work what are ...'s main activities? <i>For example, analysis of blood samples, verifying invoices, teaching mathematics, organizing work schedules, cleaning vegetables.</i></p>	<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									
<p>E9. Does ... usually work 30 hours or more per week at this job?</p>	<p>1 <input type="radio"/> Yes 2 <input type="radio"/> No</p>	<p>1 <input type="radio"/> Yes 2 <input type="radio"/> No</p>												
<p>E10. When did ... first start working for this employer or start his/her business/farm, ignoring any temporary breaks?</p>	<p>Month Year <table border="1"> <tr> <td>□</td><td>□</td> <td>□</td><td>□</td><td>□</td><td>□</td> </tr> </table> </p>	□	□	□	□	□	□	<p>Month Year <table border="1"> <tr> <td>□</td><td>□</td> <td>□</td><td>□</td><td>□</td><td>□</td> </tr> </table> </p>	□	□	□	□	□	□
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□	□	□	□	□	□									
<p>E11. INTERVIEWER CHECK:</p>	<p>1 <input type="radio"/> <i>If the answer at E3 is (1) working for wages, salary, tips or commissions → Go to E12</i> 2 <input type="radio"/> <i>Otherwise → Go to next person/ Section F</i></p>	<p>1 <input type="radio"/> <i>If the answer at E3 is (1) working for wages, salary, tips or commissions → Go to E12</i> 2 <input type="radio"/> <i>Otherwise → Go to next person/ Section F</i></p>												
<p>E12. Is ... a union member at this job?</p>	<p>1 <input type="radio"/> Yes → Go to E14 2 <input type="radio"/> No</p>	<p>1 <input type="radio"/> Yes → Go to E14 2 <input type="radio"/> No</p>												
<p>E13. Is ... covered by a union contract or collective agreement?</p>	<p>1 <input type="radio"/> Yes 2 <input type="radio"/> No</p>	<p>1 <input type="radio"/> Yes 2 <input type="radio"/> No</p>												

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1 <input type="radio"/> Yes 2 <input type="radio"/> No	1 <input type="radio"/> Yes 2 <input type="radio"/> No	1 <input type="radio"/> Yes 2 <input type="radio"/> No	1 <input type="radio"/> Yes 2 <input type="radio"/> No

E14. In this job, does ... participate in any of the following:
(answer required to a, b and c below)

(a) a group RRSP?

1 Yes

2 No

1 Yes

2 No

(b) a Deferred Profit Sharing Plan?

1 Yes

2 No

1 Yes

2 No

**(c) an employer or union sponsored pension plan,
other than the Canada or Québec Pension Plan?**

1 Yes

2 No → Go to next
person/
Section F

1 Yes

2 No → Go to next
person/
Section F

E15. The following questions are about ...'s pension plan at work. They will help us to understand how important that plan is to ...'s financial security. To do this we will use a Statistics Canada file called Pension Plans in Canada. This file contains only information about the provisions of pension plans; it contains no information about individuals.

(a) What is the name of ...'s employer pension plan?

(b) What is the registration number of this plan?
(Box 50 on this person's T4 slip.)

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(c) How much did ... contribute to this plan in 2004?
(Box 20 on this person's T4 slip.)

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(d) What was ...'s pension adjustment in 2004?
(Box 52 on this person's T4 slip.)

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(e) For how many years and months has ... been a member of that plan?

Include: all time in this plan, even if with a previous employer; time that was bought back.

Exclude: periods not covered by the plan (e.g. maternity leave not bought back, temporary layoff, etc.)

Number of years	Number of months				
<table border="1"><tr><td> </td><td> </td></tr></table>			<table border="1"><tr><td> </td><td> </td></tr></table>		

Number of years	Number of months				
<table border="1"><tr><td> </td><td> </td></tr></table>			<table border="1"><tr><td> </td><td> </td></tr></table>		

This information might be available in the annual statement provided by the pension plan.

<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No</p> <p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No</p> <p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → Go to next person/ Section F</p>	<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No</p> <p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No</p> <p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → Go to next person/ Section F</p>	<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No</p> <p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No</p> <p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → Go to next person/ Section F</p>	<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No</p> <p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No</p> <p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → Go to Section F</p>
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FOR INFORMATION ONLY

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F Labour force participation in 2004

The next few questions are about your (and your family's) employment in 2004.

F1. In 2004, did ... work for pay?
Full-time is defined as 30 hours and more per week at all jobs.

- 1 **Yes - Mostly full-time**
 2 **Yes - Mostly part-time**
 3 **No - Did not work → Go to F3**

- 1 **Yes - Mostly full-time**
 2 **Yes - Mostly part-time**
 3 **No - Did not work → Go to F3**

F2. How many weeks did ... work in 2004?

Enter the total number of weeks in which:

- he/she was on vacation or sick leave with pay;
- he/she worked full time or part time;
- he/she worked for wages, salary, tips or commission;
- he/she was self-employed;
- he/she worked directly towards the operation of a family farm or business without formal pay arrangements.

- 1 None
 OR
 Number of weeks
 → Go to next person/section G

- 1 None
 OR
 Number of weeks
 → Go to next person/section G

F3. During 2004, how many weeks was ... without a job or business and looking for work?

Week(s)

Week(s)

For information only

<p>1 <input type="radio"/> Yes - Mostly full-time</p> <p>2 <input type="radio"/> Yes - Mostly part-time</p> <p>3 <input type="radio"/> No - Did not work → Go to F3</p>	<p>1 <input type="radio"/> Yes - Mostly full-time</p> <p>2 <input type="radio"/> Yes - Mostly part-time</p> <p>3 <input type="radio"/> No - Did not work → Go to F3</p>	<p>1 <input type="radio"/> Yes - Mostly full-time</p> <p>2 <input type="radio"/> Yes - Mostly part-time</p> <p>3 <input type="radio"/> No - Did not work → Go to F3</p>	<p>1 <input type="radio"/> Yes - Mostly full-time</p> <p>2 <input type="radio"/> Yes - Mostly part-time</p> <p>3 <input type="radio"/> No - Did not work → Go to F3</p>
<p>1 <input type="radio"/> None</p> <p>OR</p> <p>Number of weeks</p> <p><input type="text"/> <input type="text"/> → Go to next person/section G</p>	<p>1 <input type="radio"/> None</p> <p>OR</p> <p>Number of weeks</p> <p><input type="text"/> <input type="text"/> → Go to next person/section G</p>	<p>1 <input type="radio"/> None</p> <p>OR</p> <p>Number of weeks</p> <p><input type="text"/> <input type="text"/> → Go to next person/section G</p>	<p>1 <input type="radio"/> None</p> <p>OR</p> <p>Number of weeks</p> <p><input type="text"/> <input type="text"/> → Go to section G</p>
<p><input type="text"/> <input type="text"/> Week(s)</p>	<p><input type="text"/> <input type="text"/> Week(s)</p>	<p><input type="text"/> <input type="text"/> Week(s)</p>	<p><input type="text"/> <input type="text"/> Week(s)</p>

For information only

G Income

The next part of this interview asks about personal income. With your permission, we can access information collected under the *Income Tax Act* instead of interviewing you about your income in 2004. The information we obtain will include your income from work, income government payments, and the amount of income tax paid. This would shorten the interview.

All personal information you provide is kept strictly confidential, according to the requirements of the *Statistics Act* - not only names, but any other facts that could be used to identify a person or family.

G1a. Did ... file a tax return for 2004?

1 Yes

2 No → Go to G2

1 Yes

2 No → Go to G2

G1b. Do you give permission to Statistics Canada to use your information collected under the *Income Tax Act*, for the purpose of this survey?

1 Yes → Go to next person/
Section H

2 No

1 Yes → Go to next person/
Section H

2 No

Income from work *Report amounts in dollars only, not cents*

During 2004 what was ...'s income from the following sources?

G2. Wages and salaries from all jobs before deductions. Include commissions, tips, military pay and allowances.

- Line 101 on your income tax form.
- Exclude retiring allowances, severance pay, wage loss replacement and supplementary unemployment benefits.

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G3. Farm self-employment net income: Include gross income less operating expenses and capital cost allowances.

- Line 141 on your income tax form.
- If a partnership, report respondent's share only.
- Report rent from farms leased to others in item G8.
- If incorporated, report in item G2 and/or G6, as done on your income tax form.

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G4. Other (non-farm) self-employment net income: Include gross income less operating expenses, depreciation and capital cost allowances.

- Lines 135, 137, 139 and 143 on your income tax form.
- If a partnership, report respondent's share only.
- Report TAGS in item G18.
- If incorporated, report in item G2 and/or G6, as done on your income tax form.

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Blank header area for identification or notes.

1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to G2	1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to G2	1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to G2	1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to G2
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Report amounts in dollars only, not cents

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Investment income

G5. Interest from accounts in banks, credit unions, trust companies etc., from Guaranteed Investment Certificates (GICs), Canada Savings Bonds, provincial savings bonds, other government bonds, corporate bonds, mutual funds, Treasury Bills and life insurance policies. Include interest and dividends from outside Canada.

- Line 121 on your income tax form.
- Report interest only, not the principal.
- For joint accounts, report each respondent's share separately.

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G6. Taxable amount of dividends from Canadian corporations.

- Line 120 on your income tax form.

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G7. Taxable capital gains.

- Line 127 on your income tax form.

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G8. Other investment income not reported above such as net rental income and net partnership income, etc.

- Lines 122, 126 on your income tax form.
- Interest from loans and mortgages.
- Regular income from an estate or trust fund.

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Income from government sources

G9. Child Tax Benefits.

- To be reported by the parent who receives the cheque.
- Include BC Family Bonus, New Brunswick Child Tax Benefit, New Brunswick Working Income Supplement, Alberta Family Employment Tax Credit, and Québec Family Allowances.

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G10. Old Age Security pension, Guaranteed Income Supplement and Spouse's Allowance.

- Lines 113 and 146 on your income tax form (or line 146 only for form TIS-B/TIS-C).

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<p>G11. Canada or Québec Pension Plan benefits: Report benefits received for retirement and disability including benefits for dependent children, surviving spouse and orphan's benefit.</p> <ul style="list-style-type: none"> • Line 114 on your income tax form. • Report retirement pensions from company or union-sponsored plans in item G19, or if received from outside Canada, in item G23. 	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p>G12. Employment Insurance benefits: for job loss, sickness, maternity, paternity, adoption, job creation, work sharing, retraining and benefits to self-employed fishermen.</p> <ul style="list-style-type: none"> • Line 119 on your income tax form. 	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p>G13. Social Assistance and Provincial Income Supplements from any provincial or municipal programs. Include benefits for food, fuel, shelter, clothing, special needs and payments from work incentive programs.</p> <ul style="list-style-type: none"> • Line 145 on your income tax form. 	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p>G14. Worker's Compensation Benefits from any provincial government plan covering work related injury or disability.</p> <ul style="list-style-type: none"> • Line 144 on your income tax form. • Report benefits from any non-government plans in item G23 on your income tax form. 	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p>G15. Goods & Service Tax and Harmonized Sales Tax (GST/HST) Credits: Report the amount from all GST/HST cheques received in 2004.</p> <ul style="list-style-type: none"> • Québec resident: include Québec sale tax (QST) credits. 	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p>G16. Provincial or territorial Tax Credits.</p> <ul style="list-style-type: none"> • Line 479 on your income tax form. • Québec residents only: sum of lines 455, 458 to 462 on Québec 2004 Income Tax Return. 	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>



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For information only



<p>G17. Veterans' Pension and Civilian War Pension Allowances from Veterans Affairs.</p> <ul style="list-style-type: none"> Report regular retirement pensions from the Canadian Forces in item G19. 	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>						
<p>G18. Other income from government sources not reported above, such as:</p> <ul style="list-style-type: none"> Payments from training programs. Property tax reduction and rebates. Regular payments from provincial automobile insurance plans (exc. lump sum payments). Payments under the Program for Older Worker Adjustment (POWA). Payments for employees in the fishing industry (TAGS). 	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>Specify income types:</p> <table border="1" data-bbox="841 787 1144 934"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>				<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>Specify income types:</p> <table border="1" data-bbox="1205 787 1508 934"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>			
<p>Income from pensions, RRSPs, RRIFs</p>								
<p>G19. Retirement pensions, superannuation and annuities, excluding RRSPs: Include survivors' benefits from an employment pension plan and annuity benefits that do not come from a matured RRSP.</p> <ul style="list-style-type: none"> T4A slip boxes 16 and 24, T3 slip box 31, T5 slip box 19. Exclude return of contributions from a pension plan. Report severance pay and retiring allowances in item G23. 	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>						
<p>G20. Annuities from a matured Registered Retirement Savings Plan and withdrawals from a Registered Retirement Income Fund (RRIF), Life Income Fund (LIF) or Locked-in Retirement Income Fund (LRIF).</p> <ul style="list-style-type: none"> T4RSP slip box 16 and T4RIF slip boxes 16 and 20. 	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>						
<p>G21. RRSP withdrawals from unmatured RRSP's, excluding tax-free withdrawals through the Home Buyer's Plan:</p> <ul style="list-style-type: none"> T4RSP slip box 22, 26. 	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>						
<p>G22. Spousal and child support, separation allowance:</p> <ul style="list-style-type: none"> Report only taxable amounts in hands of receiver. Include benefits received under a court order or written agreement. Line 128 on your income tax form. 	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>						

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<p>G23. Other income not reported above such as:</p> <ul style="list-style-type: none"> retirement income received from outside Canada, non-government plan payments for work related injury or disability, severance pay/retiring allowance, wage loss replacement benefits, employer or union supplementary unemployment benefits for lost earnings due to illness, layoff etc., payment from Children's Aid, scholarships, etc., Lines 104 and 130 on your income tax form. Exclude proceeds from the sale of property, business, financial assets or personal belongings, income tax refunds, loans received, loans repaid to you as a lender, refunds of contribution to work-related pension plans. 	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>Specify income types:</p> <table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>				<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>Specify income types:</p> <table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>			

<p>G24. What is ...'s total income in 2004?</p> <ul style="list-style-type: none"> Line 150 on your income tax form. 	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
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Income tax and other tax form information

<p>G25. What is the total income tax on ...'s 2004 income? Include both federal and provincial tax.</p> <ul style="list-style-type: none"> All provinces except Québec: sum of lines 420 and 428 (or 435 only for form TIS-A/TIS-B) Québec: sum of line 420 from the federal tax return and line 450 from the Québec tax return. Subtract sum of lines 444 to 447 from line 450. 	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
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<p>G26. What were ...'s Registered Retirement Savings Plan (RRSP) contributions?</p> <ul style="list-style-type: none"> Line 208 on your income tax form. 	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
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<p>G27. What is the amount paid by ... in union dues?</p> <ul style="list-style-type: none"> Line 212 on your income tax form. 	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
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For information only

H Previous employer pension plans

<p>H1. INTERVIEWER CHECK: Is ... 25 years of age or over? Refer to age at the top of the page.</p>	<p>1 <input type="radio"/> Yes → Go to H2 2 <input type="radio"/> No → Go to next person/ Section K</p>	<p>1 <input type="radio"/> Yes → Go to H2 2 <input type="radio"/> No → Go to next person/ Section K</p>						
<p>Now a few questions about participation in previous pension plans.</p>								
<p>H2. Other than a pension plan you may have already mentioned, in the past did ... belong to any other employer pension plans? Do not consider:</p> <ul style="list-style-type: none"> • Canada or Québec Pension Plan, • a group RRSP, • a Deferred Profit Sharing Plan. 	<p>1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to next person/ Section I</p>	<p>1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to next person/ Section I</p>						
<p>H3. How many such employer pension plans did ... previously belong to?</p>	<p>1 <input type="radio"/> One 2 <input type="radio"/> More than one ↓ Enter number of plans <input type="text"/> <input type="text"/></p>	<p>1 <input type="radio"/> One 2 <input type="radio"/> More than one ↓ Enter number of plans <input type="text"/> <input type="text"/></p>						
<p>Note: The next few questions refer to the plan to which ... belonged the longest.</p>								
<p>H4. Is ... currently receiving benefits from this plan?</p>	<p>1 <input type="radio"/> Yes → Go to next person/ Section I 2 <input type="radio"/> No</p>	<p>1 <input type="radio"/> Yes → Go to next person/ Section I 2 <input type="radio"/> No</p>						
<p>H5. When ... left this plan, what happened to the funds that had accumulated in it? Were they...? Mark all that apply.</p>	<p>1 <input type="radio"/> Left in the plan 2 <input type="radio"/> Transferred to a new employer pension plan 3 <input type="radio"/> Transferred to an RRSP → Go to next person/ Section I 4 <input type="radio"/> Returned to this person in a lump sum → Go to next person/ Section I 5 <input type="radio"/> Other: Specify → Go to next person/ Section I</p> <table border="1" data-bbox="850 1843 1151 1990"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>				<p>1 <input type="radio"/> Left in the plan 2 <input type="radio"/> Transferred to a new employer pension plan 3 <input type="radio"/> Transferred to an RRSP → Go to next person/ Section I 4 <input type="radio"/> Returned to this person in a lump sum → Go to next person/ Section I 5 <input type="radio"/> Other: Specify → Go to next person/ Section I</p> <table border="1" data-bbox="1213 1843 1513 1990"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>			

<p>1 <input type="radio"/> Yes → Go to H2</p> <p>2 <input type="radio"/> No → Go to next person/ Section K</p>	<p>1 <input type="radio"/> Yes → Go to H2</p> <p>2 <input type="radio"/> No → Go to next person/ Section K</p>	<p>1 <input type="radio"/> Yes → Go to H2</p> <p>2 <input type="radio"/> No → Go to next person/ Section K</p>	<p>1 <input type="radio"/> Yes → Go to H2</p> <p>2 <input type="radio"/> No → Go to Section K</p>
<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → Go to next person/ Section I</p>	<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → Go to next person/ Section I</p>	<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → Go to next person/ Section I</p>	<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → Go to Section I</p>
<p>1 <input type="radio"/> One</p> <p>2 <input type="radio"/> More than one</p> <p>↓</p> <p>Enter number of plans <input type="text"/> <input type="text"/></p>	<p>1 <input type="radio"/> One</p> <p>2 <input type="radio"/> More than one</p> <p>↓</p> <p>Enter number of plans <input type="text"/> <input type="text"/></p>	<p>1 <input type="radio"/> One</p> <p>2 <input type="radio"/> More than one</p> <p>↓</p> <p>Enter number of plans <input type="text"/> <input type="text"/></p>	<p>1 <input type="radio"/> One</p> <p>2 <input type="radio"/> More than one</p> <p>↓</p> <p>Enter number of plans <input type="text"/> <input type="text"/></p>
<p>1 <input type="radio"/> Yes → Go to next person/ Section I</p> <p>2 <input type="radio"/> No</p>	<p>1 <input type="radio"/> Yes → Go to next person/ Section I</p> <p>2 <input type="radio"/> No</p>	<p>1 <input type="radio"/> Yes → Go to next person/ Section I</p> <p>2 <input type="radio"/> No</p>	<p>1 <input type="radio"/> Yes → Go to Section I</p> <p>2 <input type="radio"/> No</p>
<p>1 <input type="radio"/> Left in the plan</p> <p>2 <input type="radio"/> Transferred to a new employer pension plan</p> <p>3 <input type="radio"/> Transferred to an RRSP → Go to next person/ Section I</p> <p>4 <input type="radio"/> Returned to this person in a lump sum → Go to next person/ Section I</p> <p>5 <input type="radio"/> Other: Specify → Go to next person/ Section I</p> <p><input type="text"/></p> <p><input type="text"/></p> <p><input type="text"/></p>	<p>1 <input type="radio"/> Left in the plan</p> <p>2 <input type="radio"/> Transferred to a new employer pension plan</p> <p>3 <input type="radio"/> Transferred to an RRSP → Go to next person/ Section I</p> <p>4 <input type="radio"/> Returned to this person in a lump sum → Go to next person/ Section I</p> <p>5 <input type="radio"/> Other: Specify → Go to next person/ Section I</p> <p><input type="text"/></p> <p><input type="text"/></p> <p><input type="text"/></p>	<p>1 <input type="radio"/> Left in the plan</p> <p>2 <input type="radio"/> Transferred to a new employer pension plan</p> <p>3 <input type="radio"/> Transferred to an RRSP → Go to next person/ Section I</p> <p>4 <input type="radio"/> Returned to this person in a lump sum → Go to next person/ Section I</p> <p>5 <input type="radio"/> Other: Specify → Go to next person/ Section I</p> <p><input type="text"/></p> <p><input type="text"/></p> <p><input type="text"/></p>	<p>1 <input type="radio"/> Left in the plan</p> <p>2 <input type="radio"/> Transferred to a new employer pension plan</p> <p>3 <input type="radio"/> Transferred to an RRSP → Go to Section I</p> <p>4 <input type="radio"/> Returned to this person in a lump sum → Go to Section I</p> <p>5 <input type="radio"/> Other: Specify → Go to Section I</p> <p><input type="text"/></p> <p><input type="text"/></p> <p><input type="text"/></p>

H6. INTERVIEWER CHECK:	1 <input type="radio"/> If H5 is 1 or 2 → Go to H7 2 <input type="radio"/> Otherwise → Go to next person/ Section K	1 <input type="radio"/> If H5 is 1 or 2 → Go to H7 2 <input type="radio"/> Otherwise → Go to next person/ Section K								
H7. For whom did ... work when he/she belonged to this plan? <i>Name of business, government department, agency, or person, etc.</i>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>								
H8. What kind of business, industry or service was this? <i>For example, wheat farm, road maintenance, retail shoe store, secondary school.</i>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>								
H9. In what year did ... stop working for this employer?	Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>								
H10. In the last full year that ... worked for this employer what were his/her total earnings, before taxes or other deductions? Exclude any commissions, tips, bonuses or paid overtime.	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>								
H11. For how many years and months was ... a member of that employer pension plan? <i>Include</i> <ul style="list-style-type: none"> all time in this plan, even if with a previous employer; time that was bought back. <i>Exclude</i> <ul style="list-style-type: none"> periods not covered by the plan (e.g. maternity leave not bought back, temporary layoff, etc.) 	<table border="0"> <tr> <td>Number of years</td> <td>Number of months</td> </tr> <tr> <td><input type="text"/> <input type="text"/></td> <td><input type="text"/> <input type="text"/></td> </tr> </table>	Number of years	Number of months	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<table border="0"> <tr> <td>Number of years</td> <td>Number of months</td> </tr> <tr> <td><input type="text"/> <input type="text"/></td> <td><input type="text"/> <input type="text"/></td> </tr> </table>	Number of years	Number of months	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>
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Number of years	Number of months									
<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>									

<p>1 <input type="radio"/> If H5 is 1 or 2 → Go to H7</p> <p>2 <input type="radio"/> Otherwise → Go to next person/ Section K</p>	<p>1 <input type="radio"/> If H5 is 1 or 2 → Go to H7</p> <p>2 <input type="radio"/> Otherwise → Go to next person/ Section K</p>	<p>1 <input type="radio"/> If H5 is 1 or 2 → Go to H7</p> <p>2 <input type="radio"/> Otherwise → Go to next person/ Section K</p>	<p>1 <input type="radio"/> If H5 is 1 or 2 → Go to H7</p> <p>2 <input type="radio"/> Otherwise → Go to Section K</p>
<div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>
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<p>Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p>Number of years <input type="text"/> <input type="text"/> Number of months <input type="text"/> <input type="text"/></p>	<p>Number of years <input type="text"/> <input type="text"/> Number of months <input type="text"/> <input type="text"/></p>	<p>Number of years <input type="text"/> <input type="text"/> Number of months <input type="text"/> <input type="text"/></p>	<p>Number of years <input type="text"/> <input type="text"/> Number of months <input type="text"/> <input type="text"/></p>

Pension plan benefits - in pay

I1. INTERVIEWER CHECK: Is ... 25 years of age or over? <i>Refer to age at the top of the page.</i>	1 <input type="radio"/> Yes → Go to I2 2 <input type="radio"/> No → Go to next person/ Section K	1 <input type="radio"/> Yes → Go to I2 2 <input type="radio"/> No → Go to next person/ Section K
I2. Is ... <u>currently</u> receiving benefits from an employer pension plan? <i>This does not include benefits of any kind from the Canada or Québec Pension Plan.</i> (Note: This may be known from question H4)	1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to next person/ Section J	1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to next person/ Section J
I3. Is ... receiving more than one of these pensions?	1 <input type="radio"/> Yes 2 <input type="radio"/> No	1 <input type="radio"/> Yes 2 <input type="radio"/> No
The following questions are about the largest pension ... is receiving.		
I4. Is this a pension benefit from a previous employer or is it a spouse's or survivor benefit?	1 <input type="radio"/> Previous employer → Go to I6 2 <input type="radio"/> Spouse's	1 <input type="radio"/> Previous employer → Go to I6 2 <input type="radio"/> Spouse's
I5. Is any portion of this benefit an orphan's pension?	1 <input type="radio"/> Yes 2 <input type="radio"/> No } → Go to I8	1 <input type="radio"/> Yes 2 <input type="radio"/> No } → Go to I8
I6. INTERVIEWER CHECK: Is ... less than 65 years of age? <i>Refer to age at the top of the page.</i>	1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to I8	1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to I8
I7. Does this plan offer a temporary supplement paid until the person's eligibility for Old Age Security or the Canada Pension Plan/ Québec Pension Plan?	1 <input type="radio"/> Yes 2 <input type="radio"/> No 7 <input type="radio"/> DK	1 <input type="radio"/> Yes 2 <input type="radio"/> No 7 <input type="radio"/> DK
I8. What is the <u>monthly</u> amount of the full pension benefit?	\$ <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> 1 <input type="radio"/> Gross 2 <input type="radio"/> Net	\$ <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> 1 <input type="radio"/> Gross 2 <input type="radio"/> Net

1 <input type="radio"/> Yes → Go to I2 2 <input type="radio"/> No → Go to next person/ Section K	1 <input type="radio"/> Yes → Go to I2 2 <input type="radio"/> No → Go to next person/ Section K	1 <input type="radio"/> Yes → Go to I2 2 <input type="radio"/> No → Go to next person/ Section K	1 <input type="radio"/> Yes → Go to I2 2 <input type="radio"/> No → Go to next person/ Section K
1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to next person/ Section J	1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to next person/ Section J	1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to next person/ Section J	1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to next person/ Section J
1 <input type="radio"/> Yes 2 <input type="radio"/> No	1 <input type="radio"/> Yes 2 <input type="radio"/> No	1 <input type="radio"/> Yes 2 <input type="radio"/> No	1 <input type="radio"/> Yes 2 <input type="radio"/> No
1 <input type="radio"/> Previous employer → Go to I6 2 <input type="radio"/> Spouse's	1 <input type="radio"/> Previous employer → Go to I6 2 <input type="radio"/> Spouse's	1 <input type="radio"/> Previous employer → Go to I6 2 <input type="radio"/> Spouse's	1 <input type="radio"/> Previous employer → Go to I6 2 <input type="radio"/> Spouse's
1 <input type="radio"/> Yes } → Go to I8 2 <input type="radio"/> No }	1 <input type="radio"/> Yes } → Go to I8 2 <input type="radio"/> No }	1 <input type="radio"/> Yes } → Go to I8 2 <input type="radio"/> No }	1 <input type="radio"/> Yes } → Go to I8 2 <input type="radio"/> No }
1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to I8	1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to I8	1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to I8	1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to I8
1 <input type="radio"/> Yes 2 <input type="radio"/> No 7 <input type="radio"/> DK	1 <input type="radio"/> Yes 2 <input type="radio"/> No 7 <input type="radio"/> DK	1 <input type="radio"/> Yes 2 <input type="radio"/> No 7 <input type="radio"/> DK	1 <input type="radio"/> Yes 2 <input type="radio"/> No 7 <input type="radio"/> DK
\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 1 <input type="radio"/> Gross 2 <input type="radio"/> Net	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 1 <input type="radio"/> Gross 2 <input type="radio"/> Net	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 1 <input type="radio"/> Gross 2 <input type="radio"/> Net	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 1 <input type="radio"/> Gross 2 <input type="radio"/> Net

<p>I9. Is this pension indexed? In other words, does or will the amount of the pension increase?</p>	<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → <i>Go to next person/ Section J</i></p>	<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → <i>Go to next person/ Section J</i></p>						
<p>I10. Does that increase occur...?</p>	<p>1 <input type="radio"/> Every year</p> <p>2 <input type="radio"/> Less often than every year</p> <p>3 <input type="radio"/> Have not yet had an increase</p> <p>4 <input type="radio"/> Other: <i>Specify</i></p> <table border="1" data-bbox="852 934 1144 1081"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>				<p>1 <input type="radio"/> Every year</p> <p>2 <input type="radio"/> Less often than every year</p> <p>3 <input type="radio"/> Have not yet had an increase</p> <p>4 <input type="radio"/> Other: <i>Specify</i></p> <table border="1" data-bbox="1209 934 1502 1081"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>			
<p>I11. Is that increase.....?</p>	<p>1 <input type="radio"/> Equal to the increase in inflation</p> <p>2 <input type="radio"/> Equal to only part of the increase in inflation</p> <p>3 <input type="radio"/> A set percentage</p> <p>4 <input type="radio"/> At the employer's discretion</p> <p>5 <input type="radio"/> Other: <i>Specify</i></p> <table border="1" data-bbox="852 1533 1144 1680"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>				<p>1 <input type="radio"/> Equal to the increase in inflation</p> <p>2 <input type="radio"/> Equal to only part of the increase in inflation</p> <p>3 <input type="radio"/> A set percentage</p> <p>4 <input type="radio"/> At the employer's discretion</p> <p>5 <input type="radio"/> Other: <i>Specify</i></p> <table border="1" data-bbox="1209 1533 1502 1680"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>			

For information only

<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → <i>Go to next person/ Section J</i></p>	<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → <i>Go to next person/ Section J</i></p>	<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → <i>Go to next person/ Section J</i></p>	<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → <i>Go to Section J</i></p>
<p>1 <input type="radio"/> Every year</p> <p>2 <input type="radio"/> Less often than every year</p> <p>3 <input type="radio"/> Have not yet had an increase</p> <p>4 <input type="radio"/> Other: Specify</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<p>1 <input type="radio"/> Every year</p> <p>2 <input type="radio"/> Less often than every year</p> <p>3 <input type="radio"/> Have not yet had an increase</p> <p>4 <input type="radio"/> Other: Specify</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<p>1 <input type="radio"/> Every year</p> <p>2 <input type="radio"/> Less often than every year</p> <p>3 <input type="radio"/> Have not yet had an increase</p> <p>4 <input type="radio"/> Other: Specify</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<p>1 <input type="radio"/> Every year</p> <p>2 <input type="radio"/> Less often than every year</p> <p>3 <input type="radio"/> Have not yet had an increase</p> <p>4 <input type="radio"/> Other: Specify</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>
<p>1 <input type="radio"/> Equal to the increase in inflation</p> <p>2 <input type="radio"/> Equal to only part of the increase in inflation</p> <p>3 <input type="radio"/> A set percentage</p> <p>4 <input type="radio"/> At the employer's discretion</p> <p>5 <input type="radio"/> Other: Specify</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<p>1 <input type="radio"/> Equal to the increase in inflation</p> <p>2 <input type="radio"/> Equal to only part of the increase in inflation</p> <p>3 <input type="radio"/> A set percentage</p> <p>4 <input type="radio"/> At the employer's discretion</p> <p>5 <input type="radio"/> Other: Specify</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<p>1 <input type="radio"/> Equal to the increase in inflation</p> <p>2 <input type="radio"/> Equal to only part of the increase in inflation</p> <p>3 <input type="radio"/> A set percentage</p> <p>4 <input type="radio"/> At the employer's discretion</p> <p>5 <input type="radio"/> Other: Specify</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<p>1 <input type="radio"/> Equal to the increase in inflation</p> <p>2 <input type="radio"/> Equal to only part of the increase in inflation</p> <p>3 <input type="radio"/> A set percentage</p> <p>4 <input type="radio"/> At the employer's discretion</p> <p>5 <input type="radio"/> Other: Specify</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>

Retirement

<p>J1. INTERVIEWER CHECK: Is ... 45 years of age or over? Refer to age at the top of the page.</p>	<p>1 <input type="radio"/> Yes → Go to J2 2 <input type="radio"/> No → Go to next person/ Section K</p>	<p>1 <input type="radio"/> Yes → Go to J2 2 <input type="radio"/> No → Go to next person/ Section K</p>						
<p>J2. Has ... ever retired?</p>	<p>1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to J8</p>	<p>1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to J8</p>						
<p>J3. At what age did ... retire (for the first time, if more than once)?</p>	<p>Age <input type="text"/></p>	<p>Age <input type="text"/></p>						
<p>J4. For which reasons did ... retire? Mark all that apply.</p>	<p>01 <input type="radio"/> Personal health 02 <input type="radio"/> For other personal or family responsibilities 03 <input type="radio"/> Sufficient financial security 04 <input type="radio"/> Mandatory retirement policy 05 <input type="radio"/> Completed the required years of service to qualify for a pension 06 <input type="radio"/> Early retirement incentive 07 <input type="radio"/> Lay-off 08 <input type="radio"/> Other, Specify</p> <table border="1" data-bbox="852 1570 1154 1713"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>				<p>01 <input type="radio"/> Personal health 02 <input type="radio"/> For other personal or family responsibilities 03 <input type="radio"/> Sufficient financial security 04 <input type="radio"/> Mandatory retirement policy 05 <input type="radio"/> Completed the required years of service to qualify for a pension 06 <input type="radio"/> Early retirement incentive 07 <input type="radio"/> Lay-off 08 <input type="radio"/> Other, Specify</p> <table border="1" data-bbox="1214 1570 1516 1713"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>			
<p>J5. Did ... work for pay at any time after (the first) retirement?</p>	<p>1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to next person/ Section K</p>	<p>1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to next person/ Section K</p>						

1 <input type="radio"/> Yes → Go to J2 2 <input type="radio"/> No → Go to next person/ Section K	1 <input type="radio"/> Yes → Go to J2 2 <input type="radio"/> No → Go to next person/ Section K	1 <input type="radio"/> Yes → Go to J2 2 <input type="radio"/> No → Go to next person/ Section K	1 <input type="radio"/> Yes → Go to J2 2 <input type="radio"/> No → Go to Section K
1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to J8	1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to J8	1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to J8	1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to J8
Age <input type="text"/> <input type="text"/>	Age <input type="text"/> <input type="text"/>	Age <input type="text"/> <input type="text"/>	Age <input type="text"/> <input type="text"/>
01 <input type="radio"/> Personal health 02 <input type="radio"/> For other personal or family responsibilities 03 <input type="radio"/> Sufficient financial security 04 <input type="radio"/> Mandatory retirement policy 05 <input type="radio"/> Completed the required years of service to qualify for a pension 06 <input type="radio"/> Early retirement incentive 07 <input type="radio"/> Lay-off 08 <input type="radio"/> Other, Specify <input type="text"/> <input type="text"/> <input type="text"/>	01 <input type="radio"/> Personal health 02 <input type="radio"/> For other personal or family responsibilities 03 <input type="radio"/> Sufficient financial security 04 <input type="radio"/> Mandatory retirement policy 05 <input type="radio"/> Completed the required years of service to qualify for a pension 06 <input type="radio"/> Early retirement incentive 07 <input type="radio"/> Lay-off 08 <input type="radio"/> Other, Specify <input type="text"/> <input type="text"/> <input type="text"/>	01 <input type="radio"/> Personal health 02 <input type="radio"/> For other personal or family responsibilities 03 <input type="radio"/> Sufficient financial security 04 <input type="radio"/> Mandatory retirement policy 05 <input type="radio"/> Completed the required years of service to qualify for a pension 06 <input type="radio"/> Early retirement incentive 07 <input type="radio"/> Lay-off 08 <input type="radio"/> Other, Specify <input type="text"/> <input type="text"/> <input type="text"/>	01 <input type="radio"/> Personal health 02 <input type="radio"/> For other personal or family responsibilities 03 <input type="radio"/> Sufficient financial security 04 <input type="radio"/> Mandatory retirement policy 05 <input type="radio"/> Completed the required years of service to qualify for a pension 06 <input type="radio"/> Early retirement incentive 07 <input type="radio"/> Lay-off 08 <input type="radio"/> Other, Specify <input type="text"/> <input type="text"/> <input type="text"/>
1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to next person/ Section K	1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to next person/ Section K	1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to next person/ Section K	1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to Section K

<p>J6. Was the paid work mostly full-time or mostly part-time?</p>	<p>1 <input type="radio"/> Full-time mostly 2 <input type="radio"/> Part-time mostly</p>	<p>1 <input type="radio"/> Full-time mostly 2 <input type="radio"/> Part-time mostly</p>
<p>J7. Why did ... perform paid work (after the first retirement)? <i>Mark all that apply.</i></p>	<p>01 <input type="radio"/> Financial considerations 02 <input type="radio"/> Change in family situation 03 <input type="radio"/> Improvement in health 04 <input type="radio"/> Job offer from employer 05 <input type="radio"/> Did not like retirement 06 <input type="radio"/> Work was interesting 07 <input type="radio"/> Other, specify</p> <div style="border: 1px solid black; height: 40px; width: 100%;"></div> <p style="text-align: center;">→ Go to next person/ Section K</p>	<p>01 <input type="radio"/> Financial considerations 02 <input type="radio"/> Change in family situation 03 <input type="radio"/> Improvement in health 04 <input type="radio"/> Job offer from employer 05 <input type="radio"/> Did not like retirement 06 <input type="radio"/> Work was interesting 07 <input type="radio"/> Other, specify</p> <div style="border: 1px solid black; height: 40px; width: 100%;"></div> <p style="text-align: center;">→ Go to next person/ Section K</p>
<p>J8. At what age does ... plan to retire? (If not known, please give your best estimate)</p>	<p>Age <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/></p> <p>1 <input type="radio"/> Don't intend to retire → Go to next person/ Section K</p>	<p>Age <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/></p> <p>1 <input type="radio"/> Don't intend to retire → Go to next person/ Section K</p>
<p>J9. At retirement age, what best describes how adequate ...'s financial situation will be?</p>	<p>1 <input type="radio"/> More than adequate 2 <input type="radio"/> Adequate 3 <input type="radio"/> Less than adequate</p>	<p>1 <input type="radio"/> More than adequate 2 <input type="radio"/> Adequate 3 <input type="radio"/> Less than adequate</p>

Person ID <input type="text"/>	Person ID <input type="text"/>	Person ID <input type="text"/>	Person ID <input type="text"/>
First Name <input type="text"/> Age <input type="text"/>	First Name <input type="text"/> Age <input type="text"/>	First Name <input type="text"/> Age <input type="text"/>	First Name <input type="text"/> Age <input type="text"/>

<p>1 <input type="radio"/> Full-time mostly</p> <p>2 <input type="radio"/> Part-time mostly</p>	<p>1 <input type="radio"/> Full-time mostly</p> <p>2 <input type="radio"/> Part-time mostly</p>	<p>1 <input type="radio"/> Full-time mostly</p> <p>2 <input type="radio"/> Part-time mostly</p>	<p>1 <input type="radio"/> Full-time mostly</p> <p>2 <input type="radio"/> Part-time mostly</p>
<p>01 <input type="radio"/> Financial considerations</p> <p>02 <input type="radio"/> Change in family situation</p> <p>03 <input type="radio"/> Improvement in health</p> <p>04 <input type="radio"/> Job offer from employer</p> <p>05 <input type="radio"/> Did not like retirement</p> <p>06 <input type="radio"/> Work was interesting</p> <p>07 <input type="radio"/> Other, specify</p> <p><input type="text"/></p> <p><input type="text"/></p> <p><input type="text"/></p> <p>→ Go to next person/ Section K</p>	<p>01 <input type="radio"/> Financial considerations</p> <p>02 <input type="radio"/> Change in family situation</p> <p>03 <input type="radio"/> Improvement in health</p> <p>04 <input type="radio"/> Job offer from employer</p> <p>05 <input type="radio"/> Did not like retirement</p> <p>06 <input type="radio"/> Work was interesting</p> <p>07 <input type="radio"/> Other, specify</p> <p><input type="text"/></p> <p><input type="text"/></p> <p><input type="text"/></p> <p>→ Go to next person/ Section K</p>	<p>01 <input type="radio"/> Financial considerations</p> <p>02 <input type="radio"/> Change in family situation</p> <p>03 <input type="radio"/> Improvement in health</p> <p>04 <input type="radio"/> Job offer from employer</p> <p>05 <input type="radio"/> Did not like retirement</p> <p>06 <input type="radio"/> Work was interesting</p> <p>07 <input type="radio"/> Other, specify</p> <p><input type="text"/></p> <p><input type="text"/></p> <p><input type="text"/></p> <p>→ Go to next person/ Section K</p>	<p>01 <input type="radio"/> Financial considerations</p> <p>02 <input type="radio"/> Change in family situation</p> <p>03 <input type="radio"/> Improvement in health</p> <p>04 <input type="radio"/> Job offer from employer</p> <p>05 <input type="radio"/> Did not like retirement</p> <p>06 <input type="radio"/> Work was interesting</p> <p>07 <input type="radio"/> Other, specify</p> <p><input type="text"/></p> <p><input type="text"/></p> <p><input type="text"/></p> <p>→ Go to Section K</p>
<p>Age <input type="text"/></p> <p>1 <input type="radio"/> Don't intend to retire → Go to next person/ Section K</p>	<p>Age <input type="text"/></p> <p>1 <input type="radio"/> Don't intend to retire → Go to next person/ Section K</p>	<p>Age <input type="text"/></p> <p>1 <input type="radio"/> Don't intend to retire → Go to next person/ Section K</p>	<p>Age <input type="text"/></p> <p>1 <input type="radio"/> Don't intend to retire → Go to Section K</p>
<p>1 <input type="radio"/> More than adequate</p> <p>2 <input type="radio"/> Adequate</p> <p>3 <input type="radio"/> Less than adequate</p>	<p>1 <input type="radio"/> More than adequate</p> <p>2 <input type="radio"/> Adequate</p> <p>3 <input type="radio"/> Less than adequate</p>	<p>1 <input type="radio"/> More than adequate</p> <p>2 <input type="radio"/> Adequate</p> <p>3 <input type="radio"/> Less than adequate</p>	<p>1 <input type="radio"/> More than adequate</p> <p>2 <input type="radio"/> Adequate</p> <p>3 <input type="radio"/> Less than adequate</p>

K Behaviours and attitudes

Now, a few questions about the way you manage your finances. This section and the following concerns you and your family members all together.

K1. Do you (or anyone in your family) have credit cards?
This would include VISA, MasterCard, American Express, Diners Club/enRoute, gas station or retail store cards.

- 1 Yes
2 No → Go to K5

K2. In total, how many credit cards with different account numbers do you (all) use?

Cards

K3. What is the total credit limit on all credit card(s) that you own?

\$

K4. Do you (all) usually pay off credit card balances each month?

- 1 Yes
2 No } → Go to K6

K5. Is this because you have been refused this type of credit?

- 1 Yes
2 No

K6. In 2004, were (any of) you ever behind two months or more in ...
Mark all that apply.

- 1 Bills and loans
2 Rent or mortgage
3 Other
4 No

K7. In 2004, did (any of) you sell or use an asset to pay a debt?

- 1 Yes
2 No

K8. In the past 3 years, have (any of) you borrowed money through a pay day loan?

- 1 Yes
2 No

K9. In 2004, did (any of) you pawn or sell any of your possessions to a pawn broker?

- 1 Yes
2 No

K10. Have you (or any member of your family) ever declared bankruptcy or made a formal proposal or informal financial arrangement to your creditors?

- 1 Yes
2 No

K11. Is there someone you could turn to for financial assistance if you (your family) were in financial difficulty?

- 1 Yes
2 No
3 Would not be necessary

K12. Have (any of) you ever had or do you now have money in RRSPs?

- 1 Yes
2 No → Go to K14

K13. Have (any of) you ever withdrawn money from an RRSP:

- (a) to purchase an annuity or a RRIF
(Registered Retirement Income Fund)?
- 1 Yes
2 No
- (b) through the Home Buyers' Plan?
- 1 Yes
2 No
- (c) through the Lifelong Learning Plan?
- 1 Yes
2 No
- (d) for any other reason?
- 1 Yes
2 No

K14. Do you have a household budget?

- 1 Yes
2 No

K15. (a) If you had to make an unforeseen expenditure today of \$500 or more, would you...?
Mark all that apply.

- 01 Use savings
02 Borrow from a friend or relative
03 Use credit cards
04 Use line of credit
05 Arrange for a loan
06 Sell an asset
07 Could not handle unforeseen expenditures
08 Other : *Specify*

(b) And if the expenditure were \$5,000 or more?
Mark all that apply.

- 01 Use savings
02 Borrow from a friend or relative
03 Use credit cards
04 Use line of credit
05 Arrange for a loan
06 Sell an asset
07 Could not handle unforeseen expenditures
08 Other : *Specify*

K16. In 2004, excluding any money spent on investments or the purchase of a home or automobile, would you say that your (family's) spending:

- 1 Exceeded income
2 Equalled income
3 Was less than income

K17. In the next two years do you think your (family's) financial situation will get better, worse, or stay the same?

- 1 Better
2 Worse
3 Same
7 DK

Principal residence

The following questions are about your principal residence, that is, the property where you usually live.

L1. What type of dwelling is this?

Mark one circle.

- 01 Single detached
- 02 Double/semi-detached
- 03 Row or terrace
- 04 Duplex
- 05 Apartment in a building with less than five storeys
- 06 Apartment in a building with five or more storeys
- 07 Mobile home
- 08 Other - Specify

L2. Do you own this dwelling or do you pay rent?

In these questions "you" refers to all family members in the household.

- 1 Own
- 2 Rent → Go to Section M
- 3 Occupy rent free → Go to Section M

L3. Do you share ownership of this property with anyone other than family members in the household?

- 1 Yes
- 2 No → Go to L5

L4. What percent do you own?

			%
--	--	--	---

L5. Did you inherit or receive as a gift all or a part of this property?

- 1 Yes → Go to L10
- 2 No

L6. In what year did you purchase this property?

--	--	--	--

L7. What was the purchase price?

\$							
----	--	--	--	--	--	--	--

L8. Is this the first home that you (this family) has purchased and lived in?

- 1 Yes
- 2 No

L9. What was your down payment in percentage terms?

			%
--	--	--	---

L10. How much would this property sell for today?

\$							
----	--	--	--	--	--	--	--

L11. How much is now owed on the first (or only) mortgage on this property?

1 Nothing is owed → Go to L17

OR

\$

L12. Is this mortgage being paid off faster than your original amortization period requires?

Refers to the amortization period when the house was purchased and may be due to more frequent payments or periodic lump sum payments.

1 Yes

2 No

L13. Was this mortgage taken out or renegotiated for a purpose not related to your home, for example, to purchase another asset or an investment?

1 Yes

2 No

L14. Do you have a second mortgage on this property?

1 Yes

2 No → Go to L17

L15. How much is now owed on it?

\$

L16. Was this mortgage taken out or renegotiated for a purpose not related to your home, for example, to purchase another asset or an investment?

1 Yes

2 No

L17. Do you have a reverse mortgage on this property?

A reverse mortgage is a loan against your property through the Canadian Home Ownership Income (CHIP) Plan.

1 Yes

2 No → Go to L20

L18. In what year did you receive the reverse mortgage?

L19. What amount was received for your reverse mortgage?

\$

L20. On your tax return, do you deduct a percentage of the expenses of this property because it is used for business purposes?

1 Yes → What percent? %

2 No

L21. Is part of this property rented out?

1 Yes → What percent? %

2 No

L22. Is this property a farm?

1 Yes

2 No → Go to Section M

Complete these questions only if the principal residence is a farm.

L23. For what type of farming was this property primarily used?

Type that generates the largest percentage of farm income.

- 01 Cash crops
- 02 Dairy
- 03 Beef
- 04 Hogs
- 05 Poultry
- 06 Sheep
- 07 Special enterprise (e.g. beekeeping, fur animals, horses, maple syrup, aquaculture)
- 08 Mixed enterprise

L24. Can you estimate the value of the farmhouse (and yard) separately from the rest of the farm?

Exclude: farm buildings and equipment.

- 1 Yes
- 2 No → Go to Section M

L25. How much would the farmhouse (and yard) sell for today?

\$

For information only

M Other real estate / property

The following questions deal with assets other than the principal residence. Provide this information for all family members in your household, regardless of age. If applicable, remember to exclude any assets associated with any business you own. These are reported later.

Provide the current value of each item. **Current value** is defined as the amount you could get if you sold the item today (the market value) or, in the case of chequing and savings accounts, the balance in the account.

- Include interest and investment income earned to date if it is still held within the investment.
- If an investment or item is in another country or currency please estimate the value in Canadian dollars.

If you have more than one of any of the assets below, you may find it easier to report the value of each separately.

	Total or Asset 1	Asset 2	Remainder
--	------------------	---------	-----------

Do you have any of the following:

M1. Real estate or property

(other than the principal residence)?
Report family members' share of property if owned in partnership with others.

- (a) In Canada? 1 Yes →
2 No

Type of property?

- 01 Vacant Lot
02 Cottage
03 Vacation home/second home
04 Timeshare
05 Rental property (residential)
06 Commercial property
07 Other
Specify:

Amount it could be sold for:

\$

Type of property?

- 01 Vacant Lot
02 Cottage
03 Vacation home/second home
04 Timeshare
05 Rental property (residential)
06 Commercial property
07 Other
Specify:

Amount it could be sold for:

\$

Amount it could be sold for:

\$

	Total or Asset 1	Asset 2	Remainder						
<p>(b) Outside Canada? (in Canadian \$)</p> <p>1 <input type="radio"/> Yes → 2 <input type="radio"/> No</p>	<p>Type of property?</p> <p>01 <input type="radio"/> Vacant Lot 02 <input type="radio"/> Cottage 03 <input type="radio"/> Vacation home/ second home 04 <input type="radio"/> Timeshare 05 <input type="radio"/> Rental property (residential) 06 <input type="radio"/> Commercial property 07 <input type="radio"/> Other Specify:</p> <table border="1" style="width: 100%; height: 40px;"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>				<p>Type of property?</p> <p>01 <input type="radio"/> Vacant Lot 02 <input type="radio"/> Cottage 03 <input type="radio"/> Vacation home/ second home 04 <input type="radio"/> Timeshare 05 <input type="radio"/> Rental property (residential) 06 <input type="radio"/> Commercial property 07 <input type="radio"/> Other Specify:</p> <table border="1" style="width: 100%; height: 40px;"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>				
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<p>M2. Do you still owe amounts for mortgages on real estate or property other than your principal residence?</p> <p>(a) In Canada?</p> <p>1 <input type="radio"/> Yes → 2 <input type="radio"/> No 9 <input type="radio"/> Not applicable</p> <p>(b) Outside Canada? (in Canadian \$)</p> <p>1 <input type="radio"/> Yes → 2 <input type="radio"/> No 9 <input type="radio"/> Not applicable</p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>						

N Cars / Other vehicles

N1. Excluding any leased vehicle do you own any licensed cars, trucks, vans or sport utility vehicles?

- 1 Yes
 2 No → Go to N3
 7 DK

Exclude: leased vehicles, company cars, motorcycles.
Include: vehicles licensed only part of year.

(a) How many do you own?

	Total or Asset 1	Asset 2	Remainder
<p>For each vehicle, what is the make:</p> <p>(b) Make? (Chrysler, Ford, → Honda, Mazda, Toyota, etc.)</p> <p>(c) Model? (Escort, Accord, → 626, Tercel, etc.)</p> <p>(d) Year? →</p> <p>(e) How much could it be sold for?</p>	<p><input type="text"/></p> <p><input type="text"/></p> <p><input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p><input type="text"/></p> <p><input type="text"/></p> <p><input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p><input type="text"/></p> <p><input type="text"/></p> <p><input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p>N2. Do you still owe amounts on the loans for these licensed cars, trucks, vans or sport utility vehicles?</p> <p>1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF</p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p>N3. Do you own any other vehicles, water or aircraft? <i>Include: motorhome, RVs, trailers, motorcycles, boats (including sail, canoe or jetski), snowmobiles, ATVs, aircraft, etc.</i></p> <p>1 <input type="radio"/> Yes → 2 <input type="radio"/> No → Go to next asset/ Section O 7 <input type="radio"/> DK 9 <input type="radio"/> RF</p>	<p>Amount it could be sold for:</p> <p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>Amount it could be sold for:</p> <p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>Amount it could be sold for:</p> <p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p>N4. Do you still owe amounts on the loans for these vehicles, water or aircraft?</p> <p>1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF</p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>

Financial assets

Do you have any of the following registered/tax-sheltered savings plans? If so, report total amount or value of the plan, not just this year's contributions. In addition, you will be asked details on investments, later in the survey.

Do you have any:	Total or Asset 1	Asset 2	Remainder
O1. Registered Education Savings Plans? (RESPs) 1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
O2. RRSPs or LIRAs <i>(Registered Retirement Savings Plan, Locked-in Retirement Accounts)</i> 1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
O3. Registered Retirement Income Funds? (RRIFs) <i>Includes: Life Income Funds (LIFs) and Locked-in Retirement Income Funds (LRIFs).</i> 1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
O4. Deferred Profit Sharing Plans? 1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>

Report the value or amount of each of the following accounts or assets, and be sure to **EXCLUDE** amounts held in registered savings plans already reported. Convert amounts in a foreign currency to Canadian dollars. Do you have any:

O5. Chequing and savings accounts with a non-zero balance? <i>Include uncashed cheques.</i> 1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
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06. Term deposits and guaranteed investment certificates (GICs)? <i>Include: interest re-invested.</i>	Total or Asset 1	Asset 2	Remainder
1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
07. Savings bonds <i>(Canada Savings Bonds, provincial savings bonds)</i> 1 <input type="radio"/> Yes 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF What is the: (a) Face value of bonds being paid by instalment? <i>(meaning per payment)</i> (b) Face value of fully paid bonds? (c) Interest earned to date on compound interest bonds?	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
08. Mutual funds and other investment funds? <i>If in RRSPs report in O2.</i> 1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	Current value \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> ↓ Total purchase value (book value) \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Current value \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> ↓ Total purchase value (book value) \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Current value \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> ↓ Total purchase value (book value) \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
09. Income Trust <i>If in RRSPs report in O2.</i> 1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	Current value \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> ↓ Total purchase value (book value) \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Current value \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> ↓ Total purchase value (book value) \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Current value \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> ↓ Total purchase value (book value) \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

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O16. Annuities? <i>Total value, not amount of payment.</i>	Total or Asset 1	Asset 2	Remainder
1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
O17. Other money held in trust? <i>Example : inheritance (estate) trusts (not reported in other categories)</i> 1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
O18. Asset-backed securities? 1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
O19. Money owed to you in the form of mortgages held? 1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
O20. Amount in foreign pension plans? <i>For example: U.S. 401K plans.</i> 1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
O21. Other investments or financial assets? <i>Include: Derivatives (e.g., futures contracts, options), short-term paper, NISA accounts (for farmers), brokerage accounts, and precious metals certificates.</i> 1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>

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P Other assets

	Total or Asset 1	Asset 2	Remainder
<p>P1. Do you have any collectibles and valuables?</p> <p><i>For example: antiques, artwork, jewellery, collections of stamps, coins, dolls, classic automobiles.</i></p> <p>1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF</p>	<p>Current value:</p> <p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>Current value:</p> <p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>Current value:</p> <p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>

<p>P2. What is the approximate value of the contents of your principal residence? Provide the value if sold today, not the insured or replacement value.</p> <p><i>Include: major appliances, electronic equipment, furniture other than antiques.</i></p> <p>Enter range</p> <p><input type="text"/> <input type="text"/></p> <p>01 - 16</p>	<p>01) under \$1,000 09) \$75,000 - \$99,999</p> <p>02) \$1,000 - \$4,999 10) \$100,000 - \$149,999</p> <p>03) \$5,000 - \$9,999 11) \$150,000 - \$199,999</p> <p>04) \$10,000 - \$19,999 12) \$200,000 - \$299,999</p> <p>05) \$20,000 - \$29,999 13) \$300,000 - \$499,999</p> <p>06) \$30,000 - \$39,999 14) \$500,000 - \$749,999</p> <p>07) \$40,000 - \$49,999 15) \$750,000 - \$999,999</p> <p>08) \$50,000 - \$74,999 16) \$1,000,000 or more</p>		
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<p>P3. Do you have other assets not already described?</p> <p><i>For example: copyrights, patents, royalties, etc.</i></p> <p>1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF</p>	<p>Current value:</p> <p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>Current value:</p> <p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>Current value:</p> <p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
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Q Debts

We now have some questions about your family's debts. Once again, "you" refers to you and all family members in the household. If applicable, remember to exclude any debts or loans associated with any business you own.

Do you have outstanding balances on the following?	Total or Debt 1	Debt 2	Remainder
<p>Q1. VISA, MasterCard, American Express, Diners Club/enRoute? <i>Total amount still owing on your last bill/bills excluding new purchases.</i></p> <p>1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF</p>	<i>Report amounts in dollars only, not cents</i>		
<p>Q2. Other credit cards? <i>Total amount still owing on your last bill/bills excluding new purchases. Include retail store cards, gas station cards, etc.</i></p> <p>1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF</p>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<p>Q3. Deferred payment and instalment plans (unless reported in Q2)? <i>Do not include amounts previously included in N2 and N4.</i></p> <p>1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF</p>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Do you have outstanding balances on the following?	Total or Debt 1	Debt 2	Remainder
<p>Q4. Personal lines of credit: Do not include amounts previously included in N2 and N4.</p> <p>(a) Home equity line of credit?</p> <p>1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF</p> <p>(b) Other lines of credit?</p> <p>1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF</p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p>Q5. Other loans from financial institutions?</p> <p><i>For example: banks, credit unions, trust and mortgage loan companies. Include: home renovation loans, debt consolidation loans, loans to purchase RRSPs, etc.</i></p> <p><i>Exclude: loans already reported, money borrowed for a business (Section S), student loans (Section R).</i></p> <p><i>Do not include amounts previously included in N2 and N4.</i></p> <p>1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF</p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p>Q6. Other money owed and not already reported?</p> <p><i>Include: taxes owing, past due bills, etc.</i> <i>Exclude: same items as in question Q5</i></p> <p>1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF</p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>

R Student Loans

Now, some questions about your family's student loans.

R1. Do you (or any family member in the household) owe any money on student loans? Exclude loans from family members and other individuals.

- 1 Yes
 2 No → Go to Section S

R2. How many people in this family have student loans?

Beginning with the person with the largest outstanding amount in student loans.

R3. In whose name is this loan?	<input type="text"/> <input type="text"/> Enter person ID from Section A	<input type="text"/> <input type="text"/> Enter person ID from Section A	<input type="text"/> <input type="text"/> Enter person ID from Section A
R4. In total, how much was borrowed by this person?	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
R5. How much is still owed by this person for student loans?	1 <input type="radio"/> Same amount or 2 <input type="radio"/> ↓ \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	1 <input type="radio"/> Same amount or 2 <input type="radio"/> ↓ \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	1 <input type="radio"/> Same amount or 2 <input type="radio"/> ↓ \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
R6. Is this person currently making payments on the amount owed?	1 <input type="radio"/> Yes 2 <input type="radio"/> No	1 <input type="radio"/> Yes 2 <input type="radio"/> No	1 <input type="radio"/> Yes 2 <input type="radio"/> No
R7. In which year did ... last receive a student loan?	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> year	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> year	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> year

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S Businesses - Incorporated and unincorporated

S1. Do you, or any family member in the household, own an incorporated or unincorporated business? Include a professional practice or farm.

- 1 Yes → How many?
- 2 No → Go to Section T

Ensure assets and debts are not double counted, here and in earlier sections (Sections L (Principal Residence), and M (Other real estate\Property)). "You" includes you and all family members in the household.

Beginning with the business with the highest market value ...	Business 1	Business 2	Business 3
S2. Is this business ...	1 <input type="radio"/> Incorporated? 2 <input type="radio"/> Unincorporated?	1 <input type="radio"/> Incorporated? 2 <input type="radio"/> Unincorporated?	1 <input type="radio"/> Incorporated? 2 <input type="radio"/> Unincorporated?
S3. In which year, did you start or buy this business?	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> year	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> year	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> year
S4. What percentage of the business do you own?	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
S5. What is your equity in the business, that is, the net amount you (your family) would receive if this business were sold today? Deduct any outstanding debts that must be paid.	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
S6. What is the book value of the assets of the <u>entire</u> business (cost price less depreciation)? Include: financial assets, accounts receivable, inventories, land, buildings, machinery, equipment, customer lists, intangible assets, etc.	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
S7. What is the total amount of the debts and liabilities of the business? Include: loans and mortgages, payables, deferred taxes, accrued payroll, etc.	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
S8. Are you currently using any personal assets to secure any debts of this business?	1 <input type="radio"/> Yes 2 <input type="radio"/> No	1 <input type="radio"/> Yes 2 <input type="radio"/> No	1 <input type="radio"/> Yes 2 <input type="radio"/> No

	Business 1	Business 2	Business 3
S9. What source of funding was used when this business was first established or acquired? <i>Mark all that apply.</i>	01 <input type="radio"/> Own money 02 <input type="radio"/> Money from friend/relative 03 <input type="radio"/> Government loan 04 <input type="radio"/> Mortgage 05 <input type="radio"/> Home line of credit 06 <input type="radio"/> Other loans from financial institutions 07 <input type="radio"/> No start-up money required 08 <input type="radio"/> Other: <i>Specify</i> <input type="text"/> <input type="text"/>	01 <input type="radio"/> Own money 02 <input type="radio"/> Money from friend/relative 03 <input type="radio"/> Government loan 04 <input type="radio"/> Mortgage 05 <input type="radio"/> Home line of credit 06 <input type="radio"/> Other loans from financial institutions 07 <input type="radio"/> No start-up money required 08 <input type="radio"/> Other: <i>Specify</i> <input type="text"/> <input type="text"/>	01 <input type="radio"/> Own money 02 <input type="radio"/> Money from friend/relative 03 <input type="radio"/> Government loan 04 <input type="radio"/> Mortgage 05 <input type="radio"/> Home line of credit 06 <input type="radio"/> Other loans from financial institutions 07 <input type="radio"/> No start-up money required 08 <input type="radio"/> Other: <i>Specify</i> <input type="text"/> <input type="text"/>
S10. What source(s) of funding is/are being used? <i>Mark all that apply.</i>	01 <input type="radio"/> Own money 02 <input type="radio"/> Money from friend/relative 03 <input type="radio"/> Government loan 04 <input type="radio"/> Mortgage 05 <input type="radio"/> Home line of credit 06 <input type="radio"/> Other loans from financial institutions 07 <input type="radio"/> Business equity/income 08 <input type="radio"/> Other: <i>Specify</i> <input type="text"/> <input type="text"/>	01 <input type="radio"/> Own money 02 <input type="radio"/> Money from friend/relative 03 <input type="radio"/> Government loan 04 <input type="radio"/> Mortgage 05 <input type="radio"/> Home line of credit 06 <input type="radio"/> Other loans from financial institutions 07 <input type="radio"/> Business equity/income 08 <input type="radio"/> Other: <i>Specify</i> <input type="text"/> <input type="text"/>	01 <input type="radio"/> Own money 02 <input type="radio"/> Money from friend/relative 03 <input type="radio"/> Government loan 04 <input type="radio"/> Mortgage 05 <input type="radio"/> Home line of credit 06 <input type="radio"/> Other loans from financial institutions 07 <input type="radio"/> Business equity/income 08 <input type="radio"/> Other: <i>Specify</i> <input type="text"/> <input type="text"/>
S11. What type of business is this? <input type="text"/> <input type="text"/> If a farm → Go to S12 Otherwise → Go to next business/ Section T	<input type="text"/> <input type="text"/> If a farm → Go to S12 Otherwise → Go to next business/ Section T	<input type="text"/> <input type="text"/> If a farm → Go to S12 Otherwise → Go to next business/ Section T	<input type="text"/> <input type="text"/> If a farm → Go to S12 Otherwise → Go to Section T
S12. Have you included the farmhouse in: (a) the value of your equity in the business (Question S5)? (b) the book value of the business assets (Question S6)?	1 <input type="radio"/> Yes in S5 2 <input type="radio"/> Not in S5 1 <input type="radio"/> Yes in S6 2 <input type="radio"/> Not in S6	1 <input type="radio"/> Yes in S5 2 <input type="radio"/> Not in S5 1 <input type="radio"/> Yes in S6 2 <input type="radio"/> Not in S6	1 <input type="radio"/> Yes in S5 2 <input type="radio"/> Not in S5 1 <input type="radio"/> Yes in S6 2 <input type="radio"/> Not in S6

T Expenses

Now, a few questions about some of the major expenses that must be paid on a regular basis.
 How much do you (and your family) pay for the following expenses associated with your principal residence?
 Exclude expenses for vacation homes and secondary residences.

Shelter

Report amounts in dollars only, not cents

Do you pay...

T1. Mortgage payments (regular payment excluding taxes)	1 <input type="radio"/> Pay → 2 <input type="radio"/> Do not pay	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	1 <input type="radio"/> Monthly (average) 2 <input type="radio"/> Quarterly (average) 3 <input type="radio"/> Annually
T2. Additional or lump sum mortgage payments made in 2004	1 <input type="radio"/> Made → 2 <input type="radio"/> Not made	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	1 <input type="radio"/> Monthly (average) 2 <input type="radio"/> Quarterly (average) 3 <input type="radio"/> Annually
T3. Property taxes <i>Include school taxes if paid separately.</i>	1 <input type="radio"/> Pay → 2 <input type="radio"/> Do not pay	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	1 <input type="radio"/> Monthly (average) 2 <input type="radio"/> Quarterly (average) 3 <input type="radio"/> Annually
T4. Condominium fees <i>Include common area maintenance fees.</i>	1 <input type="radio"/> Pay → 2 <input type="radio"/> Do not pay	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	1 <input type="radio"/> Monthly (average) 2 <input type="radio"/> Quarterly (average) 3 <input type="radio"/> Annually
T5. Rent <i>Should not apply for those that own their principal residence.</i>	1 <input type="radio"/> Pay → 2 <input type="radio"/> Do not pay	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	1 <input type="radio"/> Monthly (average) 2 <input type="radio"/> Quarterly (average) 3 <input type="radio"/> Annually
T6. Insurance premiums paid on principal residence	1 <input type="radio"/> Pay → 2 <input type="radio"/> Do not pay	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	1 <input type="radio"/> Monthly (average) 2 <input type="radio"/> Quarterly (average) 3 <input type="radio"/> Annually
T7. Electricity	1 <input type="radio"/> Pay → 2 <input type="radio"/> Do not pay/ included in other payments	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	1 <input type="radio"/> Monthly (average) 2 <input type="radio"/> Quarterly (average) 3 <input type="radio"/> Annually
T8. Oil, gas, propane, wood, etc.	1 <input type="radio"/> Pay → 2 <input type="radio"/> Do not pay/ included in other payments	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	1 <input type="radio"/> Monthly (average) 2 <input type="radio"/> Quarterly (average) 3 <input type="radio"/> Annually
T9. Water	1 <input type="radio"/> Pay → 2 <input type="radio"/> Do not pay/ included in other payments	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	1 <input type="radio"/> Monthly (average) 2 <input type="radio"/> Quarterly (average) 3 <input type="radio"/> Annually

Other expenses

How much do you (and your family) pay for the following other ongoing expenses?

<p>T10. Vehicle registration and insurance including public and private insurance</p>	<p>1 <input type="radio"/> Pay → 2 <input type="radio"/> Do not pay</p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>1 <input type="radio"/> Monthly (average) 2 <input type="radio"/> Quarterly (average) 3 <input type="radio"/> Annually</p>
<p>T11. How much are the payments on leased vehicles? <i>Exclude company cars</i></p>	<p>1 <input type="radio"/> Pay → 2 <input type="radio"/> Do not pay</p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>1 <input type="radio"/> Monthly (average) 2 <input type="radio"/> Quarterly (average) 3 <input type="radio"/> Annually</p>
<p>T12. Average payments on non-mortgage loans. <i>For example loans for automobiles, personal, student, line of credit, etc. Do not include full-balance payments on your credit card.</i></p>	<p>1 <input type="radio"/> Pay → 2 <input type="radio"/> Do not pay</p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>1 <input checked="" type="radio"/> Monthly (average) 2 <input type="radio"/> Quarterly (average) 3 <input type="radio"/> Annually</p>
<p>T13. In 2004, did you, or any member of your family pay any support payments to a former spouse or partner? By support payments we mean alimony, separation allowance, or child support.</p>	<p>1 <input type="radio"/> Pay → 2 <input type="radio"/> Do not pay</p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>1 <input type="radio"/> Monthly (average) 2 <input type="radio"/> Quarterly (average) 3 <input type="radio"/> Annually</p>
<p>T14. In 2004, did you, or any member of your family pay for child care, such as day care or babysitting, so that a family member could work at his/her paid job(s)?</p>	<p>1 <input type="radio"/> Pay → 2 <input type="radio"/> Do not pay</p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>1 <input type="radio"/> Monthly (average) 2 <input type="radio"/> Quarterly (average) 3 <input type="radio"/> Annually</p>
<p>T15. In addition to any amounts reported in the previous question (T14), did you, or any member of your family pay for babysitting or programs for children during school year so that a family member could work at his/her paid job(s)?</p>	<p>1 <input type="radio"/> Pay → 2 <input type="radio"/> Do not pay</p>	<p>\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>1 <input type="radio"/> Monthly (average) 2 <input type="radio"/> Quarterly (average) 3 <input type="radio"/> Annually</p>

U Other factors affecting family financial position

<p>U1. Do you (or any member of your household) have any life insurance policies? Include term, permanent, mortgage, and group insurance.</p>	<p>1 <input type="radio"/> Yes → How many people? <input type="text"/> <input type="text"/></p> <p>2 <input type="radio"/> No → Go to U4</p>
<p>U2. What is the total face value of all policies, that is, the amount it/they would pay if the insured dies? Include the total for all family members.</p>	<p>Amount \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p>U3. What is the total <u>cash</u> value of all permanent life insurance policies, that is, the amount the insurance company would pay if the policy were surrendered (e.g. cancelled) today?</p>	<p>Amount \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p>U4. Have any of the current family members ever received an inheritance(s)?</p>	<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → Go to U6</p>
<p>U5. For each inheritance received, list the year in which it was received and the market value of the inheritance at the time it was received. Include financial and non-financial inheritances. (if more than 5 inheritances received, list only 5 largest). <i>Some inheritances are doled out as annual stipends from an estate trust arrangement.</i></p>	<p>Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>Amount \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>Amount \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>Amount \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>Amount \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p>U6. In 2004, did you (or any family member in the household) give any amounts for living expenses to any family member outside your household (e.g. children, parents). Do not include alimony or child support previously reported.</p>	<p>1 <input type="radio"/> Yes</p> <p>2 <input type="radio"/> No → Go to U8</p>
<p>U7. What was the total amount of this financial assistance paid for the year?</p>	<p>Amount \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>

<p>U8. In 2004, did you (or any family member in the household) receive any amounts for living expenses from any family member outside your household (i.e. children, elderly parents). Do not include alimony or child support previously reported.</p>	<p>1 <input type="radio"/> Yes 2 <input type="radio"/> No → Go to U10</p>
<p>U9. What was the total amount of this financial assistance received for the year?</p>	<p>Amount \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p>U10. Over the past 3 years, what was your <u>annual average family income</u>?</p>	<p>01 <input type="radio"/> Less than \$0 02 <input type="radio"/> Between 0 - \$19,999 03 <input type="radio"/> \$20,000 - \$39,999 04 <input type="radio"/> \$40,000 - \$59,999 05 <input type="radio"/> \$60,000 - \$79,999 06 <input type="radio"/> \$80,000 - \$99,999 07 <input type="radio"/> \$100,000 - \$149,999 08 <input type="radio"/> \$150,000 - \$199,999 09 <input type="radio"/> \$200,000 - \$249,999 10 <input type="radio"/> more than \$250,000</p>
<p>U11. Have you (or any family member in your household) ever invested money directly in another person's business (such a family member, friend, colleague, business associate or even a stranger)? Include all forms of investment, e.g. loans, equity. Excluding investments in the stock market publicly traded companies, mutual funds, etc.</p>	<p>1 <input type="radio"/> Yes 2 <input type="radio"/> No</p>

For information only

V Registered plans investments distribution

INTERVIEWER CHECK:

Verify if amounts are reported in questions
O1 (RESP), O2 (RRSP or LIRA) or O3 (RRIF) - Page 50

- 1 Yes → Complete section
2 No → Go to section W2

Do you own:		If yes, are they in a: (Mark all that apply)	What is the current value of this investment:
V1. Term deposits and Guaranteed Investment Certificates (GIC's)	1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	1 <input type="radio"/> LIRAs → 2 <input type="radio"/> RRSPs → 3 <input type="radio"/> RRIFs → 4 <input type="radio"/> RESPs → 7 <input type="radio"/> DK	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
V2. Savings bonds (Canada Savings Bonds, Provincial Savings Bonds)	1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	1 <input type="radio"/> LIRAs → 2 <input type="radio"/> RRSPs → 3 <input type="radio"/> RRIFs → 4 <input type="radio"/> RESPs → 7 <input type="radio"/> DK	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
V3. Mutual Funds (include exchange traded funds e.g.. iUNits, iShares)	1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	1 <input type="radio"/> LIRAs → 2 <input type="radio"/> RRSPs → 3 <input type="radio"/> RRIFs → 4 <input type="radio"/> RESPs → 7 <input type="radio"/> DK	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
V4. Income trust	1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	1 <input type="radio"/> LIRAs → 2 <input type="radio"/> RRSPs → 3 <input type="radio"/> RRIFs → 4 <input type="radio"/> RESPs → 7 <input type="radio"/> DK	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Do you own:		If yes, are they in a: (Mark all that apply)	What is the current value of this investment:
V5. Canadian and foreign publicly traded stocks	1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	1 <input type="radio"/> LIRAs → 2 <input type="radio"/> RRSPs → 3 <input type="radio"/> RRIFs → 4 <input type="radio"/> RESPs → 7 <input type="radio"/> DK	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
V6. Canadian and foreign bonds/debentures	1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	1 <input type="radio"/> LIRAs → 2 <input type="radio"/> RRSPs → 3 <input type="radio"/> RRIFs → 4 <input type="radio"/> RESPs → 7 <input type="radio"/> DK	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
V7. Treasury bills	1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	1 <input type="radio"/> LIRAs → 2 <input type="radio"/> RRSPs → 3 <input type="radio"/> RRIFs → 4 <input type="radio"/> RESPs → 7 <input type="radio"/> DK	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
V8. Other registered plan investments	1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	1 <input type="radio"/> LIRAs → 2 <input type="radio"/> RRSPs → 3 <input type="radio"/> RRIFs → 4 <input type="radio"/> RESPs → 7 <input type="radio"/> DK	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

INTERVIEWER CHECK:

Verify if amounts are reported in question O8 (Mutual Funds) - Page 51

1 Yes → Complete section

Types of Mutual Funds		Please provide amounts or percentages
W2. (a) Money market funds	1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> OR <input type="text"/> <input type="text"/> <input type="text"/> %
(b) Bond funds	1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> OR <input type="text"/> <input type="text"/> <input type="text"/> %
(c) Equity funds	1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> OR <input type="text"/> <input type="text"/> <input type="text"/> %
(d) Income trust funds	1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> OR <input type="text"/> <input type="text"/> <input type="text"/> %
(e) Balanced funds	1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> OR <input type="text"/> <input type="text"/> <input type="text"/> %
(f) Other	1 <input type="radio"/> Yes → 2 <input type="radio"/> No 7 <input type="radio"/> DK 9 <input type="radio"/> RF	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> OR <input type="text"/> <input type="text"/> <input type="text"/> %

Thank you for your participation in the Survey of Financial security.
If you receive comments, please write them down on the next page.

Comments *(for interviewer's information only)*

For information only

Record of contact

Contact	Date		Time		Contact code	Comments
	Day	Month	Began	Ended		
1	<input type="text"/>	<input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/>	
2	<input type="text"/>	<input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/>	
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4	<input type="text"/>	<input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/>	
5	<input type="text"/>	<input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/>	
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7	<input type="text"/>	<input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/>	
8	<input type="text"/>	<input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/>	
9	<input type="text"/>	<input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/>	
10	<input type="text"/>	<input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/>	
11	<input type="text"/>	<input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/>	
12	<input type="text"/>	<input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/>	
13	<input type="text"/>	<input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/>	
14	<input type="text"/>	<input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/>	
15	<input type="text"/>	<input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="text"/>	

For information only

Contact codes	
T Telephone	1 Unsuccessful attempt to contact
V Visit	2 Contact made, no interview held
	3 Interview
	4 Follow-up

Interviewer ID	Interviewer signature
1001	
1002	