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RACE

(PLEASE CHOOSE ONE OR MORE)

1 — White

2 — Black or African American

3 — American Indian or Alaskan Native

4 — Asian

5 — Native Hawaiian or Other Pacific Islander
ASIAN ORIGIN

1 — Chinese
2 — Filipino
3 — Japanese
4 — Korean
5 — Vietnamese
6 — Asian Indian
7 — Other group not listed
EDUCATION

00 — Never attended, preschool, kindergarten

01 — 11 — 1st grade through 11th grade

38 — 12th grade, no diploma

39 — High school graduate — high school diploma, or the equivalent (For example: GED)

40 — Some college but no degree

41 — Associate degree in college — Occupational/Vocational program

42 — Associate degree in college — Academic program

43 — Bachelor’s degree (For example: BA, AB, BS)

44 — Master’s degree (For example: MA, MS, MEng, MEd, MSW, MBA)

45 — Professional School Degree (For example: MD, DDS, DVM, LLB, JD)

46 — Doctorate degree (For example: PhD, EdD)
A person is considered to be in the armed forces if they serve in any branch of the U.S. military. This includes the Army, Navy, Marine Corps, Air Force and Coast Guard, their Reserve components and the Air and Army National Guard.
Section 1 — GENERAL SURVEY INFORMATION

Part B — GENERAL HOUSING CHARACTERISTICS

Type of structure

1 — Single family detached (detached structure with only one primary residence; however, the structure could include a rental unit(s) in the basement, attic, etc.)

2 — Row or townhouse — inner unit (2, 3, or 4 story structure with 2 walls in common with other units and a private ground level entrance; it may have a rental unit as part of the structure)

3 — End row or end townhouse (one common wall)

4 — Duplex (detached two unit structure with one common wall between the units)

5 — 3-plex or 4-plex (3 or 4 unit structure with all units occupying the same level or levels)

6 — Garden (a multi-unit structure, usually wider than it is high, having 2, 3, or possibly 4 floors; characteristically the units not only have common walls but are also stacked on top of one another)

7 — High-rise (a multi-unit structure which has 4 or more floors)

8 — Apartment or flat (a unit not described above; could be located in the basement, attic, second floor or over the garage of one of the units described above)

9 — Mobile home or trailer

10 — College dormitory

Fuels

1 — Gas (underground pipes)

2 — Electricity

3 — Fuel oil

4 — Other

5 — No fuel used

Included with this housing unit

1 — Swimming pool

2 — Off-street parking

3 — Porch, terrace, patio, or balcony

4 — Apartment or guest house

5 — Central air conditioning

6 — Window air conditioning
Section 1 — GENERAL SURVEY INFORMATION — Continued

Part C — MAJOR HOUSEHOLD APPLIANCES

1 — Cooking stove, range, or oven
2 — Microwave oven
3 — Refrigerator
4 — Home freezer
5 — Built-in dishwasher
6 — Portable dishwasher
7 — Garbage disposal
8 — Clothes washer
9 — Clothes dryer
10 — Television
11 — Home computer
12 — Sound components, component systems, or compact disc sound systems
13 — VCRs, DVD players, or digital video recorders
Section 3 — OWNED LIVING QUARTERS AND OTHER OWNED REAL ESTATE

TYPES OF OWNED REAL ESTATE

1 — A home in which you used to live
2 — Property for business or investment purposes only
3 — A second home, vacation home, or recreational property
4 — Unimproved land with no buildings on it
5 — Other property
CLOSING COSTS

- Property survey charges
- Title search
- Recording fees
- Transfer taxes
- Escrow payment
- Points paid by buyer
- Deed preparation
- Lawyer’s fees
- Advertising costs
COSTS FOR SELLING A PROPERTY

Commission to Realtor
Closing costs
Points for financing
Mortgage penalties
Property inspection
Lawyer’s fees
Advertising costs
Deferred mortgage interest payment
MORTGAGE DEFINITIONS

1 — Fixed rate mortgage (Conventional Mortgage, Fully Amortized Payment Mortgage)

2 — Rate of interest is not fixed and can go up or down over the life of the loan depending on the current interest rate (Variable Rate Mortgage, Adjustable Rate Mortgage, ARM)

3 — Payments start out low but increase later (Graduated Payment Mortgage)

4 — Interest and required payment are renegotiated on a regular basis through the life of the loan (Rollover or Renegotiable Mortgage)

5 — Initial interest and required payments are lower than usual mortgage rates. The lender receives the deferred interest plus a fee when the property is sold (Deferred Interest Mortgage)

6 — Other (Specify)
Section 3 — OWNED LIVING QUARTERS AND OTHER OWNED REAL ESTATE — Continued

MORTGAGE PAYMENT ITEMS

1 — Principal and interest
2 — Property taxes
3 — Property insurance
4 — Life insurance
5 — Mortgage guarantee insurance
6 — Any other payments (Specify)
Section 3 — OWNED LIVING QUARTERS AND OTHER OWNED REAL ESTATE — Continued

FEES FOR COOPERATIVES

1 — Repayment of loans owed by cooperative
2 — Property taxes
3 — Property insurance
4 — Management
5 — Repairs and maintenance, including lawn care and snow removal
6 — Improvements
7 — Recreational, including swimming, golf, and tennis facilities
8 — Security, including guards and alarm systems
9 — Utilities: such as gas, electricity, water, heat
10 — Trash collection
11 — Other (Specify)
HOMEOWNER’S ASSOCIATIONS OR CONDOMINIUMS FEES

1 — Management
2 — Repairs and maintenance, including lawn care and snow removal
3 — Improvements
4 — Utilities: such as gas, electricity, water, heat
5 — Parking
6 — Recreational, including swimming, golf, and tennis facilities
7 — Security, including guards and alarm systems
8 — Maid service
9 — Medical services
10 — Trash collection
11 — Other *(Specify)*
Part A — TELEPHONE EXPENSES

TELEPHONE (OR PAGER) SERVICES INCLUDED IN BILL

1 — Residential Service
2 — Mobile/Cellular Service
3 — Pager/Beeper Services

OTHER TELEPHONE AND NON-TELEPHONE SERVICE ITEMS

1 — Basic (local) service charge
2 — Domestic long distance charge
3 — International long distance charges
4 — Telephone related services such as caller ID, call waiting, call forwarding or voice mailboxes (Do not include data services)
5 — Installation or repair of telephone line(s)
6 — Telephone or pager purchases or rentals
7 — Internet access or data services
8 — Cable or satellite television services
9 — DSL or ISDN charges
10 — Non-telephone related rentals or purchases
Section 4 — UTILITIES AND FUELS FOR OWNED AND RENTED PROPERTIES — Continued

Part C — INTERNET SERVICE EXPENSES

1 — CABLE OR SATELLITE TV OR SATELLITE RADIO SERVICES
   Cable TV  DirecTV  Dish TV
   TiVo  Satellite XM Radio

2 — INTERNET CONNECTION OR INTERNET SERVICE PROVIDERS
   AOL  Earthlink  ISPs

3 — LISTENING TO OR DOWNLOADING MUSIC OR AUDIO FILES
   Napster  Kazaa  iTunes

4 — VIEWING OR DOWNLOADING VIDEO FILES

5 — ONLINE GAMES OR OTHER INTERNET ENTERTAINMENT SITES

6 — INTERNET SERVICES AWAY FROM HOME SUCH AS WEB CAFES OR INTERNET KIOSKS
Section 4 — UTILITIES AND FUELS FOR OWNED AND RENTED PROPERTIES

Part D — UTILITIES, FUELS, AND SERVICES

1 — Electricity
2 — Natural or utility gas
3 — Fuel oil
4 — Bottled or tank gas
5 — Other fuels including wood
6 — Piped-in water
7 — Sewerage maintenance
8 — Trash/garbage collection
9 — Water softening service
10 — Septic tank cleaning
JOB TYPES

1 — Dwellings under construction, including a vacation or second home
2 — Building an addition to the house or a new structure, such as a porch, garage, or new wing
3 — Finishing a basement or an attic or enclosing a porch
4 — Remodeling one or more rooms in the house
5 — Landscaping the ground or planting new shrubs or trees
6 — Building outdoor patios, walks, fences, or other enclosures, driveways, or permanent swimming pools
7 — Repairing outdoor patios, walks, fences, driveways, or permanent swimming pools (including permanent above ground swimming pools)
8 — Inside painting or papering, spackling, sanding
9 — Outside painting, caulking, sanding, or surface repairs
10 — Plastering or paneling
11 — Plumbing or water heating installations and repairs
12 — Electrical work
13 — Heating or air conditioning jobs
14 — Flooring repair or replacement, including inlaid linoleum or vinyl tile
15 — Insulation
16 — Roofing, gutters, or downspouts
17 — Siding
18 — Installation, repair, or replacement of window panes, screens, storm doors, awnings, and the like
19 — Masonry, brick, or stucco work
20 — Other improvements or repairs (include security systems which are hard-wired into the home)
Section 5 — CONSTRUCTION, REPAIRS, ALTERATIONS AND MAINTENANCE OF OWNED AND RENTED PROPERTY — Continued

**APPLIANCES**

1. Electric cooking stove, range, or oven
2. Gas cooking stove, range, or oven
3. Microwave oven
4. Other cooking stove, range, or oven including wood, coal, or peat burning stoves
5. Refrigerator
6. Home freezer
7. Dishwasher — built-in
8. Dishwasher — portable
9. Garbage disposal
10. Clothes washer
11. Clothes dryer
12. Range hood
13. Smoke alarms and detectors
14. Trash compactor
15. Window air conditioner
16. Portable cooling and heating equipment, including portable dehumidifiers, humidifiers, fans, and space heaters; excluding window air conditioners
17. Other major home appliances and equipment
Part A — HOUSEHOLD APPLIANCES

1 — MICROWAVE OVEN

2 — ELECTRIC STOVE, RANGE, OR OVEN
   (including convection oven)

3 — GAS STOVE, RANGE, OR OVEN

4 — OTHER STOVE RANGE, OR OVEN
   (such as a wood burning stove)

5 — RANGE HOOD

6 — REFRIGERATOR
   (including refrigerator/freezer combinations)

7 — HOME FREEZER

8 — BUILT-IN DISHWASHER

9 — PORTABLE DISHWASHER

10 — GARBAGE DISPOSAL

11 — CLOTHES WASHER
    (including washer/dryer combinations)

12 — CLOTHES DRYER
Section 6 — APPLIANCES, HOUSEHOLD EQUIPMENT AND OTHER SELECTED ITEMS – Continued

Part B — HOUSEHOLD APPLIANCES AND OTHER SELECTED ITEMS

SMALL HOUSEHOLD APPLIANCES

1 — SMALL ELECTRICAL KITCHEN APPLIANCES, including —
- blender
- breadmaker
- coffee grinder
- coffee maker
- crockpot
- electric barbecue
- electric can opener
- electric grill
- electric fondue set
- electric fry pan
- electric knife
- food processor
- hot plate
- ice cream maker

2 — ELECTRICAL PERSONAL CARE APPLIANCES, including —
- curling iron
- denture cleaner
- electric hair trimmer
- electric razor
- powered scale
- toothbrush
- massage
- water-pik

3 — SMOKE DETECTORS, including —
- wired
- battery-operated
- ionization chamber type
- photo-cell type

4 — ELECTRIC FLOOR CLEANING EQUIPMENT, including —
- vacuum cleaner
- hand vacuum
- rug shampooer
- floor polisher

5 — OTHER HOUSEHOLD APPLIANCES, including —
- trash compactor
- air purifier
- water filters
- carbon monoxide detector
- home security device (burglar alarm) including console, control modules, burglar alarm console, door and window transmitters

6 — SEWING MACHINES (with or without cabinet)

7 — OTHER OFFICE MACHINES INCLUDING TYPEWRITERS AND CALCULATORS, including —
- typewriter
- calculator
- copy machine
- adding machine
- fax machine

8 — PERSONAL DIGITAL ASSISTANT OR PDAS
- palm
- iPaq
Section 6 — APPLIANCES, HOUSEHOLD EQUIPMENT AND OTHER SELECTED ITEMS — Continued

Part B — HOUSEHOLD APPLIANCES AND OTHER SELECTED ITEMS — Continued

9 — COMPUTERS, COMPUTER SYSTEMS, AND RELATED HARDWARE FOR NON-BUSINESS USE, including —
   disk drives  tape equipment for computer use
   computer printers  CRT units for computer use only
   remote terminals  interface equipment
   modems  cables
   monitors  fax modems
   mouse  zip drive
   joy sticks  memory
   home computers with or without CTR’s  USB flash drives
   laptops

10 — COMPUTER SOFTWARE AND ACCESSORIES FOR NON-BUSINESS USE, including —
   software  floppy disks  printer cartridges
   zip disk  mouse pads

11 — TELEPHONES AND ACCESSORIES, including —
   telephones  beepers  headsets  chargers  car chargers
   cell phone covers  cordless telephones  phone jacks and cords  cell phones
   pagers

12 — TELEPHONE ANSWERING DEVICES
   combinations of telephone/answering machines

13 — PHOTOGRAPHIC EQUIPMENT, including —
   camera  filters  projection screen  battery pack for camera flash
   digital camera  winder  electro flash  motor driven film advancer
   lens  enlarger  strobe light  memory cards for digital
   tripod  projector  (for photographs)  cameras
   *Do not include film, film processing, or other photographic supplies.*

MUSICAL INSTRUMENTS, SUPPLIES, AND ACCESSORIES

14 — PIANOS, ORGANS, OR KEYBOARDS

15 — OTHER MUSICAL INSTRUMENTS, SUPPLIES, AND ACCESSORIES,
   including —
   guitar  valve oil  sheet music
   woodwinds  strings for musical instruments  music stand
   brass instruments  instruments  trumpet
   trombone  saxophone  any other musical
   reeds
   stringed instruments  picks
   saxophone  rosin
   drums  music books
   music books
   carrying case
Section 6 — APPLIANCES, HOUSEHOLD EQUIPMENT AND OTHER SELECTED ITEMS — Continued

Part B — HOUSEHOLD APPLIANCES AND OTHER SELECTED ITEMS — Continued

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<td>router</td>
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Section 6 — APPLIANCES, HOUSEHOLD EQUIPMENT AND OTHER SELECTED ITEMS — Continued

Part B — HOUSEHOLD APPLIANCES AND OTHER SELECTED ITEMS — Continued

TELEVISIONS, RADIOS, VIDEO, AND SOUND EQUIPMENT (Not installed in vehicles)

21 — TELEVISIONS, ALL TYPES INCLUDING COMBINATIONS OF TVs WITH DVD/VIDEO PLAYERS

- color televisions
- high definition TV
- black and white televisions

22 — VCR, VIDEO CAMERA, VIDEO DISC PLAYER, CAMCORDER, including —

- video cassette player
- video tape recorder/player
- video disc player
- video laser disc player
- combination VCR/DVD player
- DVD player

23 — SATELLITE DISHES

24 — HANDHELD PERSONAL MUSIC PLAYERS

- iPod
- jukebox music player
- Sonic Blue RIO
- personal mp3 players
- IRiver

25 — RADIO, ALL TYPES, including —

- CB (not permanently mounted in an automobile)
- clock radio
- short-wave
- transistor/portable
- Walkman (radio only)

26 — TAPE RECORDERS AND PLAYERS (not permanently mounted in an automobile), including —

- audio tape decks
- audio cassette players/recorders
- Walkman (cassette/radio combination or cassette only)

27 — SOUND COMPONENTS, COMPONENT SYSTEMS, AND COMPACT DISC SOUND SYSTEMS

- speakers
- amplifier
- tape deck (not specified)
- mixer
- turntable
- compact disc players
- stereo
- receiver
- stereo rack system
- tuner
- equalizer

28 — OTHER SOUND AND VIDEO EQUIPMENT, including —

- earphones/headphones
- battery packs
- adapter for sound equipment
- power converter
- power booster
- UHF video converter
- base station CB
- headset
- antenna (TV, radio, etc.)
- antenna
- microphone
- VCR tape rewinder
SPORTS, RECREATION, AND EXERCISE EQUIPMENT

29 — GENERAL SPORTS EQUIPMENT, including —
- roller blades
- baseball bat
- table tennis
- badminton set
- sports uniform
- football
- equipment
- soccer ball
- sports shoes
- basketball
- lawn games
- sports protective
- tennis racket
- racquetball
- frisbee
- equipment/gear
- bowling ball
- racquetball racket
- boxing equipment
- golf clubs
- baseball glove
- volleyball
- karate equipment
- basketball hoop
- skateboard

Include specialized athletic shoes such as for football, baseball, soccer, biking, and bowling, except if included in the rental or activity fee for the sport.

30 — HEALTH AND EXERCISE EQUIPMENT, including —
- trampoline
- exercise mat
- weight bench
- weights
- home gym
- treadmill
- rowing machine
- exercycle
- ab roller

31 — CAMPING EQUIPMENT, including —
- tent
- sleeping bag
- camping stove
- kerosene lamp
- sleeping pad
- camping cookware
- frame packs and
- air mattress
- portable heater
- other camping packs
- canteen

32 — HUNTING AND FISHING EQUIPMENT, including —
- fishing rod and tackle
- knife
- BB/pellet gun
- bow and arrow
- rifle
- ammunition
- crossbow
- shotgun
- scopes (not specified)

33 — WINTER SPORTS EQUIPMENT, including —
- snow skis
- ski poles
- toboggan
- ski boots
- ice skates
- sled
- snowboard
- ice boat
- snowboard equipment
- sledding equipment

34 — WATER SPORTS EQUIPMENT, including —
- water skis
- snorkel
- surf board
- life jacket
- water ski vest
- raft
- wake board
- diving equipment
- wind surf board

35 — OUTBOARD MOTORS
### Section 6 — APPLIANCES, HOUSEHOLD EQUIPMENT AND OTHER SELECTED ITEMS — Continued

#### Part B — HOUSEHOLD APPLIANCES AND OTHER SELECTED ITEMS — Continued

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<td>bicycle parts</td>
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<td>big wheels</td>
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<td>portable swimming pool</td>
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<td>paintball equipment</td>
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<td>stand tires tubes</td>
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Part B — HOUSEHOLD EQUIPMENT REPAIRS AND SERVICE CONTRACTS

1 — Garbage disposal, range hood, or built-in dishwasher

2 — Other household appliances and equipment, such as —
   washer
   refrigerator
   range/oven
   portable heating equipment
   portable air conditioning equipment (window air conditioner)
   portable fans
   dehumidifiers
   sewing machines
   typewriters
   vacuum cleaners

3 — Televisions, radios, video and sound equipment, except those installed in automobiles or other vehicles

4 — Computers, computer systems, and related equipment for non-business use

5 — Lawn and garden equipment (including lawn mower repair, snowblower repair)

6 — Musical instruments and accessories (including professional tuning)

7 — Hand or power tools

8 — Photographic equipment

9 — Sport and recreational equipment

10 — Termite or pest control treatment

11 — Heating or air conditioning equipment, such as —
   central air conditioners
   central coolers
   furnaces

Include any services provided under service contracts. Do not include repairs.
### Section 8 — HOME FURNISHINGS AND RELATED HOUSEHOLD ITEMS

#### Part A — Purchases

**LIVING, FAMILY, OR RECREATION ROOM FURNITURE**

1 — SOFAS, including —
   - sofabed
   - modular

2 — LIVING ROOM CHAIRS, including —
   - recliner
   - bean bag chair
   - rocker
   - convertible chair
   - swivel

3 — LIVING ROOM TABLES, including —
   - coffee table
   - TV table
   - end tables
   - lamp table

4 — MODULAR WALL UNITS, SHELVES, OR CABINETS including —
   - shelves
   - bookcase
   - curio cabinet
   - entertainment center

5 — PING-PONG TABLES, POOL TABLES, AND OTHER SIMILAR RECREATION ROOM ITEMS

6 — OTHER LIVING ROOM, FAMILY, OR RECREATION ROOM FURNITURE, including —
   - room divider
   - coat rack
   - card table/chairs
   - bar stools
   - foot stool (ottoman)
   - bar or porta bar
   - desk/chair
   - buffet
   - china closet

**DINING ROOM AND KITCHEN FURNITURE**

8 — ALL DINING ROOM AND KITCHEN FURNITURE, including —
   - dinette set
   - dining table and chairs
   - serving table or cart
   - kitchen chairs
   - buffet
   - china closet

**BEDROOM FURNITURE**

9 — MATTRESSES AND SPRINGS INCLUDING ROLLAWAYS

10 — BEDROOM FURNITURE OTHER THAN MATTRESSES AND SPRINGS
   - headboard
   - brass bed
   - frames
   - bunk bed
   - chest
   - dresser
   - vanity
   - cedar chest
   - night tables
   - mirrors
   - chairs
   - armoire
   - water bed
Section 8 — HOME FURNISHINGS AND RELATED
HOUSEHOLD ITEMS — Continued

Part A — Purchases — Continued

INFANTS FURNITURE AND EQUIPMENT

11 — INFANTS FURNITURE, including —
crib    mattress    toy chest
playpen    dresser    bassinet
highchair    changing table
portable crib    chest

12 — INFANTS EQUIPMENT, including —
carriage    guard rail    baby monitor
stroller    baby bottle sterilizer    baby travel systems
car seat    swing
baby backpack    baby carriers

OUTDOOR FURNITURE AND EQUIPMENT

13 — PATIO, PORCH, OR OUTDOOR FURNITURE

14 — OUTDOOR EQUIPMENT, including —
barbecue grill    patio lanterns    patio umbrella

OFFICE FURNITURE FOR HOME USE

15 — ALL OFFICE FURNITURE FOR HOME USE, including —
file cabinet    office chairs    computer furniture
safe    drawing table

Do not include any furniture used exclusively for business.
Part A — Purchases — Continued

HOUSEHOLD DECORATIVE ITEMS

16 — CLOCKS

17 — LAMPS AND OTHER LIGHTING FIXTURES, including chandeliers

18 — OTHER HOUSEHOLD DECORATIVE ITEMS, including —

- painting
- vase
- wall hangings
- plant stand
- wreaths
- baskets
- silk flowers
- mirror
- book ends
- fireplace equipment and accessories
- seasonal decorations (Christmas)

CLOSET STORAGE AND TRAVEL ITEMS

19 — STORAGE ITEMS, including —

- garment bag
- shoe bag
- shoe rack

20 — TRAVEL ITEMS, including —

- suitcases
- luggage
- portable luggage carriers
- travel garment bags
- trunk
- attaché cases
Part A — Purchases — Continued

DISHES, DINNERWARE, FLATWARE, GLASSWARE, AND COOKWARE

21 — PLASTIC DINNERWARE, including Tupperware

22 — CHINA AND OTHER DINNERWARE

23 — STAINLESS, SILVER, AND OTHER FLATWARE, EXCEPT PLASTIC

24 — GLASSWARE, including crystal

25 — SERVING PIECES OTHER THAN SILVER

26 — NONELECTRIC COOKWARE, including —
   skillet   roaster
   saucepan  pans
   pots   pressure cooker
   teakettle   casserole dishes

27 — SILVER SERVING PIECES, including —
   tray
   pitcher
   bowl
Section 8 — HOME FURNISHINGS AND RELATED
HOUSEHOLD ITEMS — Continued

Part A — Purchases — Continued

HOUSEHOLD LINENS

28 — BEDROOM LINENS, including —
   sheets  comforter  baby blanket
   pillowcases  mattress pad  electric blanket
   pillows  quilt  bedspread

29 — BATHROOM LINENS, including —
   towels  shower curtain  bath mat
   face cloths  bath rug  tub mat
   toilet cover

30 — KITCHEN AND DINING ROOM LINENS, including —
   tablecloths  cloth napkins
   dish towels  dish cloths
   small appliance cover  placemats

31 — OTHER LINENS, including —
   doilies  chair pads
   covers for living room tables  furniture protectors

32 — SLIPCOVERS, DECORATIVE PILLOWS AND CUSHIONS, CUSTOM OR
   READY-MADE
Section 8 — HOME FURNISHINGS AND RELATED HOUSEHOLD ITEMS — Continued

Part A — Purchases — Continued

FLOOR AND WINDOW COVERINGS

WALL-TO-WALL CARPETING FOR ONE OR MORE ROOMS

33 — ORIGINAL WALL-TO-WALL CARPET (original)

34 — WALL-TO-WALL CARPET (replacement)

35 — ROOM-SIZE RUGS AND OTHER NON-PERMANENT FLOOR COVERINGS, including carpet squares

36 — CURTAINS AND DRAPES (either custom or ready-made)

37 — VENETIAN BLINDS, WINDOW SHADES, AND OTHER WINDOW COVERINGS (either custom or ready-made)
### Section 9 — CLOTHING AND SEWING MATERIALS

#### Part A — Clothing *(Do not include here — clothing for children under 2 years of age.)*

1. **COATS, JACKETS, AND FURS, including —**
   - shawl
   - windbreaker
   - fur coat
   - outerwear
   - jacket
   - raincoat
   - down vest
   - winter coat

2. **SPORT COATS AND TAILORED JACKETS, including blazers**

3. **SUITS, including —**
   - formal suit
   - man’s suit (of two or more pieces)
   - woman’s suit (of two or more pieces)

4. **VESTS (purchased separately, not with a suit), excluding sweater vests and down vests**

5. **SWEATERS AND SWEATER SETS, including —**
   - cardigan
   - pullover
   - V-neck sweater
   - sweater vest
   - ski sweater

6. **PANTS, SLACKS, AND JEANS, including —**
   - jump suit
   - dress pants
   - dress slacks
   - blue jeans
   - maternity pants
   - overalls
   - casual pants

7. **SHORTS AND SHORT SETS, including men’s and boys’ dress and casual shorts and women’s and girls’ shorts and short sets.**
   *Do not include any athletic shorts.*

8. **DRESSES, including —**
   - jumpers
   - two-piece
   - sundress
   - formals or semi-formals
   - dresses
   - wedding gown

9. **SKIRTS, including short and skirt combination**
   *Do not include any tennis skirts, golf skirts, or other athletic skirts.*
Section 9 — CLOTHING AND SEWING MATERIALS — Continued

Part A — Clothing (Do not include here — clothing for children under 2 years of age.) — Continued

10 — SHIRTS, BLOUSES, AND TOPS, including —
    sport shirt jean shirt tops maternity top
dress shirt knit blouse T-shirt
Do not include any sweat shirts or athletic shirts.

11 — UNDERGARMENTS, including —
bras undershirts slips
    girdles thermal underwear underwear

12 — HOSIERY, including —
    socks knee-highs tights pantyhose

13 — NIGHTWEAR AND LOUNGEWEAR, including —
pajamas night shirt night gown thermal sleeping
robe house coat garments

14 — ACCESSORIES, including —
    umbrella gloves apron fold-up rain accessories
    belt mittens ear muffs bandannas
ties purse handkerchief prescription sunglasses
    scarves wallet bridal headpiece hair accessories

15 — ACTIVE SPORTSWEAR, including—
    athletic shorts tennis outfit sweatshirt swimwear
    athletic shirt jogging suit swimwear accessories
    hunting wear leotards snow and ski suit
Do not include any sports uniforms.

16 — UNIFORMS, other than sport, for which the cost is not reimbursed, including shirts, pants, suits, service apparel, such as: medical, barber, boy or girl scout, mechanic, waiter/waitress, plumber and lab smocks, and military apparel

17 — COSTUMES, including costumes for dance, ballet, Halloween, etc.

18 — FOOTWEAR, including —
dress shoes sandals sneakers, jogging, aerobic,
    boots bedroom slippers basketball, tennis shoes
    casual shoes
Do not include specialized athletic shoes such as for football, soccer, bowling, biking, or baseball.
Section 9 — CLOTHING AND SEWING MATERIALS — Continued

Part B — Infants Clothing

Clothing for infants under 2 years of age

1 — COATS, JACKETS, OR SNOWSUITS

2 — DRESSES AND OTHER OUTERWEAR, including —

<table>
<thead>
<tr>
<th>Item</th>
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<th>Item</th>
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</thead>
<tbody>
<tr>
<td>bathing suits</td>
<td>sweater</td>
<td>pants</td>
<td>T-shirts</td>
</tr>
<tr>
<td>sunsuit</td>
<td>romper</td>
<td>pants set</td>
<td>jeans</td>
</tr>
<tr>
<td>jumpsuit</td>
<td>overall</td>
<td>short set</td>
<td>crawler</td>
</tr>
<tr>
<td>vest</td>
<td>shirt</td>
<td></td>
<td></td>
</tr>
<tr>
<td>playsuit</td>
<td>jogging suit</td>
<td></td>
<td>tops</td>
</tr>
</tbody>
</table>

3 — UNDERWEAR AND DIAPERS, including disposable

*Do not include diaper service.*

4 — SLEEPING GARMENTS

5 — LAYETTES

6 — ACCESSORIES, including —

<table>
<thead>
<tr>
<th>Item</th>
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<th>Item</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>boots</td>
<td>socks</td>
<td>booties</td>
<td>caps/hats</td>
</tr>
<tr>
<td>mittens/gloves</td>
<td>shoes</td>
<td>bibs</td>
<td>bonnets</td>
</tr>
<tr>
<td>slippers</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Section 9 — CLOTHING AND SEWING MATERIALS — Continued

Part B — Watches, Jewelry, and Hairpieces

7 — WATCHES

8 — JEWELRY, including —
   costume jewelry, rings, and infants jewelry

9 — HAIRPIECES, WIGS, OR TOUPEES
Section 9 — CLOTHING AND SEWING MATERIALS — Continued

Part C — Clothing Services

1 — REPAIR, ALTERATION, AND TAILORING FOR CLOTHING AND ACCESSORIES

2 — SHOE REPAIR AND OTHER SHOE SERVICES

3 — WATCH OR JEWELRY REPAIR, including cleaning

4 — CLOTHING RENTAL, including formal wear

5 — CLOTHING STORAGE
Section 9 — CLOTHING AND SEWING MATERIALS — Continued

Part D — Sewing Materials

1 — SEWING AND KNITTING MATERIALS FOR THE HOME, including fabric for making slipcovers, blankets, quilts, afghans, tablecloths, flowers, curtains, etc., and for handwork including yarn

2 — SEWING MATERIALS FOR MAKING CLOTHES, including any fabric used for making clothing

3 — SEWING NOTIONS, including —
   - sewing basket
   - sewing kit
   - crochet thread
   - embroidery thread
   - seam binding
   - patterns
   - crochet hooks
   - embroidery
   - hoops
   - snaps
   - buttons
   - measuring tapes
   - scissors
   - zipper
   - needles/pins
   - knitting needles, equipment

4 — OTHER SEWING MATERIALS, including —
   - interfacing
   - fiberfill
   - beads, glitter, sequins
   - quilt pad
   - rug material
   - stuffing
   - foam
   - felt or felt square
Sections 10 and 11 — RENTED, LEASED, AND OWNED VEHICLES

1 — AUTOMOBILE

2 — TRUCK, MINIVAN, VAN, AND SUV

3 — MOTORIZED CAMPER-COACH

4 — TRAILER-TYPE CAMPER

5 — OTHER ATTACHABLE-TYPE CAMPER

6 — MOTORCYCLE, MOTOR SCOOTER AND MOPED (MOTORIZED BICYCLE)

7 — BOAT, WITH A MOTOR. INCLUDE JET SKIS

8 — BOAT, WITHOUT A MOTOR SUCH AS CANOES, KAYAKS, AND ROWBOATS

9 — TRAILER OTHER THAN CAMPER
   such as for a boat, or cycle — includes trailer for snowmobile or for moving, hauling, etc.

10 — PRIVATE PLANE

11 — ANY OTHER VEHICLE
   such as a snowmobile, dunebuggy, go-cart or riding golf cart (except charges for rental of golf carts included in golfing fees)
Part A — Vehicle Maintenance and Repair, Parts, and Equipment

1 — OIL CHANGE, LUBRICATION, and OIL FILTER
   *(Include oil only if purchased for an oil change)*

2 — MOTOR TUNE-UP, including —
   adjust ignition timing or mixture
   adjust valve
   air/fuel filters breather/vapor/air filter element
   computer sensor distributor cap, rotor emission controls
   ignition wires pcv valve spark plugs

3 — BRAKE WORK, including —
   anti-lock brake bleed brake system
   brake adjustment
   hydraulic system master cylinder
   machine drums/rotors parking brake
   shoes or pads wheel calipers wheel cylinder

4 — BATTERY PURCHASES AND INSTALLATION

5 — TIRE PURCHASES AND MOUNTING

6 — TIRE REPAIRS

7 — FRONT END ALIGNMENT, WHEEL BALANCING, WHEEL ROTATION

8 — STEERING OR FRONT-END WORK, including —
   axle bearing/seals
   axle shafts ball joints
   bushings CV joints/boots idler arms
   power steering fluid/filter rack and pinion
   steering box/linkage
   studs, lug nuts tie rods
   wheel hubs

9 — ELECTRICAL SYSTEM WORK, including —
   alternator belt alternator/ generator battery charging
   car computer coil gauges/instruments
   ignition system starter motor switches
   voltage-regulator wiring
Section 12 — VEHICLE OPERATING EXPENSES — Continued

10 — ENGINE REPAIR OR REPLACEMENT, including —
   | carburetor | fuel injector | motor mounts | timing chain/gears or belt |
   | choke      | filter        | oil pump/cooler/hoses/lines | turbo charge |
   | crankshaft | gaskets       | pistons/rods |
   | bearings   |              |              |

11 — AIR CONDITIONING WORK, including —
   | compressor | condenser   | motor/switch | recharging |

12 — ENGINE COOLING SYSTEM WORK, including —
   | coolant or filter | fan or water pump | heater core | radiator |
   | cooling fan/controls | belt | hoses | thermostat |
   | cooling fan relay | fan switch or motor | pressure cap | water pump |

13 — EXHAUST SYSTEM WORK, including —
   | catalytic converter | hanger/clamps | muffler | resonator |
   | exhaust pipe | manifold gasket |

14 — CLUTCH OR TRANSMISSION WORK, including —
   | clutch cable | hydraulic system | rebuilt | transaxle |
   | clutch fork | master cylinder | transmission | transmission filter |
   | flywheel | pilot bearing | safety switch | shaft seal |

15 — BODY WORK AND PAINTING, including —
   | convertible top | doors | T-roof |
   | crash repairs | glass replaced | vinyl top |
   | window repair/replacement | rust proofing | sanding |

16 — SHOCK ABSORBER REPLACEMENT, including MacPherson struts
Section 12 — VEHICLE OPERATING EXPENSES — Continued

17 — DRIVE SHAFT OR REAR-END WORK, including —
- axle fluid
- CV joints
- rear axle
- differential
- grommet
- rear wheel axle seal
- bushings
- rear wheel bearings
- coil or leaf springs
- tie rods
- universal joint
- CV joints
- differential
- rear axle
- grommet
- rear wheel axle seal
- rear wheel bearings

18 — VIDEO EQUIPMENT AND INSTALLATION, including —
- televisions and combinations of
- G.P.S. navigational system w/screen
- satellite receiver, In-Motion Satellite receiver
- Video game consoles

19 — AUDIO EQUIPMENT AND INSTALLATION, including —
- antenna
- CB radio
- stereo equipment
- CB antenna
- radio
- tape player
- speakers

20 — VEHICLE ACCESSORIES AND CUSTOMIZING, including —
- alarm system
- carpeting
- running boards
- steering wheel
- bike/ski racks
- fender skirts
- seat covers
- bumper guards
- luggage rack
- spoilers

21 — VEHICLE CLEANING SERVICES AND CLEANING SUPPLIES, including —
- car washes
- vehicle detailing services
- vacuuming
- cleaning mitts
- boat cleaning services
- waxes
- wheel cleaning supplies
- upholstery sprays
- protective coating

22 — OTHER VEHICLE SERVICES, PARTS, AND EQUIPMENT, including —
- battery cables
- gas cable/cap/can
- jack
- brake lights
- gasket sets
- light bulbs
- charcoal canister-
- headlights
- speedometer cable
- filters
- hub repair
- tire pressure gauge
- wheel caps
- heater repair
- tire/wheel combination
- hub caps
- vent filters
- wheel lugs
- windshield-wipers
Section 12 — VEHICLE OPERATING EXPENSES — Continued

Part B — Licensing, Registration, and Inspection of Vehicles

1 — Driver’s licenses

2 — Vehicle inspection
   emissions inspection  safety inspections

3 — State vehicle registration

4 — Local vehicle registration
## Section 13 — INSURANCE OTHER THE HEALTH

1 — LONG TERM CARE INSURANCE

2 — LIFE INSURANCE OR OTHER POLICIES WHICH PROVIDE BENEFITS IN CASE OF DEATH OR DISABILITY, including —

<table>
<thead>
<tr>
<th>Type of Insurance</th>
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</thead>
<tbody>
<tr>
<td>Term Insurance</td>
<td>Income or Disability Insurance</td>
</tr>
<tr>
<td>Whole-Life Insurance</td>
<td>Group-Life Insurance</td>
</tr>
<tr>
<td>Cash Benefits</td>
<td>Straight-Life Insurance</td>
</tr>
<tr>
<td>Mortgage Insurance</td>
<td>Flight Insurance</td>
</tr>
<tr>
<td>Veterans Insurance</td>
<td>Life Endowments</td>
</tr>
<tr>
<td>Annuities</td>
<td>Burial Insurance</td>
</tr>
</tbody>
</table>

3 — AUTOMOBILE OR OTHER VEHICLE INSURANCE, including —

<table>
<thead>
<tr>
<th>Type of Insurance</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Liability Insurance</td>
<td>Bodily Injury Insurance</td>
</tr>
<tr>
<td>Collision Insurance</td>
<td>Property Damage Insurance</td>
</tr>
<tr>
<td>Comprehensive Insurance</td>
<td>No-Fault Insurance</td>
</tr>
</tbody>
</table>

**HOME INSURANCE**

Insurance protecting your home, furniture, personal effects, or other property against fire, theft, loss, earthquakes, or damage from other means.

4 — HOMEOWNERS’S INSURANCE, including any insurance covered in mortgage payments or flood insurance

- Flood Insurance
- Fire and Extended Coverage

5 — TENANT’S INSURANCE

6 — OTHER TYPES OF NONHEALTH INSURANCE, including —

<table>
<thead>
<tr>
<th>Type of Insurance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Card Insurance</td>
</tr>
<tr>
<td>Personal Liability Insurance</td>
</tr>
<tr>
<td>Mortgage Guarantee Insurance</td>
</tr>
<tr>
<td>Ambulance</td>
</tr>
<tr>
<td>Umbrell policies</td>
</tr>
</tbody>
</table>

*Do not include malpractice insurance.*
Section 14 — HOSPITALIZATION AND HEALTH INSURANCE

1 — HEALTH MAINTENANCE ORGANIZATION

Expenses in this type of plan are usually covered in full or there is a modest co-payment at the time of your visit. There are two basic types of HMO’s. The first is the group/staff type in which you go to a central facility (group health center) to receive care. The second type is an independent practice association (IPA) in which providers work from their individual offices and are referred to as primary care physicians.

2 — FEE FOR SERVICE PLAN

In a fee for service type of plan you or your insurance company is generally billed after each visit. In a traditional fee for service plan you may go to any doctor or hospital you choose. In a Preferred Provider Organization (PPO) you are provided with a list of doctors from which you may choose. If you choose to go to one of the doctors on the PPO list, the amount of expenses covered is higher than if you go to a doctor not on the list.

3 — COMMERCIAL MEDICARE SUPPLEMENT

A Commercial Medicare Supplement is a voluntary contributory private insurance plan available to Medicare recipients, to cover the costs of deductibles, coinsurance, physician services and other medical and health services.

4 — SPECIAL PURPOSE PLAN

A special purpose plan is one which covers only specific health needs. Examples of special purpose health insurance plans are —

- Dental Insurance
- Mental Health Insurance
- Vision Insurance
- Dread Disease Policy
- Prescription Drug Insurance
Section 15 — MEDICAL AND HEALTH EXPENDITURES

EYE CARE

1 — EYE EXAMINATIONS, TREATMENT, OR SURGERY, such as —
   - eye examinations
   - surgery
   - eye treatments

2 — PURCHASE OF EYE GLASSES OR CONTACT LENSES, such as —
   - eye glasses
   - contact lenses
   - warranty expenses
   - insurance

DENTAL CARE

3 — DENTAL CARE, such as —
   - examinations
   - cleanings
   - X-rays
   - dentures
   - bridges
   - orthodontic work
   - fillings
   - caps or crowns
   - root canals
   - any other dental services

INPATIENT HOSPITAL CARE

4 — HOSPITAL ROOMS OR SERVICES including —
   - anesthetics
   - blood transfusions
   - drugs and medicine examinations
   - any other services
   - injections
   - intensive care unit
   - nursing services
   - treatment rooms
   - operating room
   - oxygen
   - recovery room
   - therapy
   - X-rays
   - general care hospitals
   - substance abuse hospitals
   - psychiatric hospitals
   - birthing centers

FROM FACILITIES SUCH AS —
Section 15 — MEDICAL AND HEALTH EXPENDITURES — Continued

SERVICES BY MEDICAL PROFESSIONALS OTHER THAN PHYSICIANS

5 — ALL SERVICES BY MEDICAL PROFESSIONALS OTHER THAN PHYSICIANS, such as —
- chiropractor
- acupuncturist
- homeopath
- physical therapist
- podiatrist
- midwife
- naturopath
- nurse practitioners

PHYSICIAN SERVICES

6 — ALL SERVICES PROVIDED AND BILLED BY PHYSICIANS, such as —
- general practitioner
- internist
- gynecologist
- dermatologist
- urologist
- psychiatrist
- osteopath
- surgeon
- any other type of physicians

OTHER MEDICAL CARE SERVICES

7 — LAB TESTS OR X-RAYS
- X-rays
- blood tests
- other types of lab tests

Do not include services received in a hospital as an inpatient or services for eye and dental care.

8 — CARE IN CONVALESCENT OR NURSING HOME, such as —
- substance abuse centers
- nursing home

Include all services provided and billed by a convalescent or nursing home.

9 — OTHER MEDICAL CARE, such as —
- ambulance services
- outpatient hospital care
- emergency room services
- blood donation

If medical care is given in outpatient department or emergency room, include —
- injections
- cardiogram
- baby shots
- allergy shots
- skin treatment
- physicians check up
- cardiology test
- hearing test
- broken/sprained bones
- cancer treatment
- blood pressure check
Section 15 — MEDICAL AND HEALTH EXPENDITURES — Continued

MEDICINE AND MEDICAL SUPPLIES

10 — PURCHASE OF HEARING AIDS

11 — PRESCRIBED MEDICINES OR PRESCRIBED DRUGS

12 — RENTAL OF SUPPORTIVE OR CONVALESCENT MEDICAL EQUIPMENT, such as —

- braces
- splints
- whirlpools
- crutches
- cervical collars
- slings
- canes
- wheelchairs
- ace bandages
- walkers

13 — PURCHASE OF SUPPORTIVE OR CONVALESCENT MEDICAL EQUIPMENT, such as —

- braces
- splints
- whirlpools
- crutches
- cervical collars
- slings
- canes
- wheelchairs
- ace bandages

14 — RENTAL OF MEDICAL OR SURGICAL EQUIPMENT FOR GENERAL USE, such as —

- ice bags
- sinus masks
- sun lamps
- hot water bottles
- blood pressure kits
- therapeutic heat lamps
- heating pads
- vaporizers
- ostomy supplies
- pollen masks
- home defibrillator
- oxygen
- orthopedic appliances
- (supports)

15 — PURCHASE OF MEDICAL OR SURGICAL EQUIPMENT FOR GENERAL USE, such as —

- thermometers
- insulin needles
- sun lamps
- ice bags
- syringes
- therapeutic heat lamps
- hot water bottles
- blood pressure kits
- ostomy supplies
- heating pads
- vaporizers
- oxygen
- pollen masks
- home defibrillator
- orthopedic appliances
- (supports)

Do not include purchases of items such as band aids, gauze, cotton roll, and cotton balls.
## Section 16 — EDUCATIONAL EXPENSES

1. **RECREATIONAL LESSONS OR OTHER INSTRUCTIONS**, including —
   - golf
dancing
driving
tennis
music
photography
skiing
painting
sailing
swimming
sewing
instructional day camps
skydiving
needlepoint
any other recreational lessons
cooking
horse riding

2. **NURSERY SCHOOL OR CHILD DAY CARE CENTERS**, including noninstructional day camps

3. **TUITION**, including —
   - college or university
business school
elementary school
high school
secretarial school
parochial school
seminary
technical school
adult education
preparatory school
vocational school
   
   Include only those expenses paid directly to the school or to other educational facility.

4. **HOUSING WHILE ATTENDING SCHOOL**, including —
   - student dormitory
sorority
housing for married students
fraternity
   
   Include only those expenses paid directly to the school or to other educational facility.

5. **FOOD OR BOARD WHILE ATTENDING SCHOOL**
   
   Include only those expenses paid directly to the school or to other educational facility.

6. **PRIVATE SCHOOL BUS**

7. **PURCHASE OF ANY SCHOOL BOOKS, SUPPLIES, OR EQUIPMENT, WHICH HAS NOT ALREADY BEEN REPORTED**, including —
   - text books
slide rule
drafting equipment
microscopes
art supplies
laboratory equipment
technical books
cap and gown

8. **OTHER SCHOOL RELATED EXPENSES NOT ALREADY REPORTED**, including the rental of any school books or expenses
   - laboratory fees
matriculation fees
athletic fees
registration fees
health fees
transportation fees
laundry fees
student union fees
conferences and seminars
cap and gown rentals
tutoring
rental of school equipment
rental of school books
administration fees
Section 17 — SUBSCRIPTIONS, MEMBERSHIPS, BOOKS, 
AND ENTERTAINMENT EXPENSES

Part A — SUBSCRIPTIONS AND MEMBERSHIPS

1 — Subscriptions to newspapers, magazines, or periodicals. Include online subscriptions
2 — Books purchased from book club
3 — Season tickets to theater, concert series, opera, other musical series, or amusement parks
4 — Season tickets to sporting events
5 — Encyclopedias or other sets of reference books
6 — Golf courses, country clubs and other social organizations
7 — Health clubs, fitness centers, swimming pools, weight loss centers, or other sports and recreational organizations
8 — Civic, service, or fraternal organization
9 — Credit card membership fees
10 — Shopping club memberships such as COSTCO and SAM’S
11 — Global positioning services, or GPS, such as OnStar
12 — Direct or online dating services
Section 17 — SUBSCRIPTIONS, MEMBERSHIPS, BOOKS, AND ENTERTAINMENT EXPENSES — Continued

Part B — BOOKS AND ENTERTAINMENT EXPENSES

1 — Fees for participation in sports, including —
   tennis     golf     bowling     swimming

2 — Single admissions to spectator sporting events, including —
   football    baseball    hockey    soccer

3 — Single admissions to performances, including —
   movies     operas     plays     concerts

4 — Single admissions to other entertainment activities, including —
   museums     amusement parks    zoos     state parks

5 — Books not purchased through book clubs, including —
   paperbacks     hardcover     audio
   Exclude reference books or school books

6 — Single copies of newspapers, magazines, periodicals (non-subscription)

7 — Compact discs, audio tapes, or records

8 — Photographic film, including —
   disposable cameras

9 — Photo processing
   digital photo processing     video film processing

10 — Video tapes, or DVD’s other than through a mail-order club

11 — Rental of video tapes or DVDs
Part A – TYPES OF TRIPS

1 — Visit friends or relatives
2 — Business trips
3 — Recreational trips, such as –
   Sightseeing
   Sports events
   Club or organizational meetings
   Outdoor recreation
4 — Any other trips that occur overnight or longer
5 — Any day trips at least 75 miles away
TYPES OF TRANSPORTATION

(COMMERCIAL)
1 — local (taxi, etc.)
2 — airplane
3 — train
4 — bus
5 — ship

(RENTED)
6 — car, jeep
7 — truck, van
8 — motorcycle, moped
9 — private plane
10 — boat, trailer
11 — camper
12 — other vehicles

(PRIVATE)
13 — car owned by CU
14 — vehicle leased by CU
15 — other vehicle owned by CU
16 — vehicle owned by someone else
17 — other transport
Section 18 — TRIPS AND VACATIONS — Continued

RENTAL OF SPORTS EQUIPMENT

Golf clubs
Skis/snowboards
Fishing equipment
Boat
Scuba/snorkeling equipment
Other sports equipment
Section 18 — TRIPS AND VACATIONS — Continued

FEES FOR PLAYING SPORTS

Golf
Fishing
Swimming
Tennis
Skiing/snowboarding
Bowling
Exercise classes
Scuba/snorkeling
Other sports
Section 18 — TRIPS AND VACATIONS — Continued

ENTERTAINMENT OR ADMISSIONS

Movies
Theater
Concerts
Museums
Tours
Sports events
Other entertainment events
Section 19 — MISCELLANEOUS EXPENSES

Part A — Miscellaneous Expenses

1. PURCHASE OR UPKEEP OF CEMETERY LOTS OR VAULTS

2. FUNERALS, BURIALS, OR CREMATION
   - burial fees
   - limousines (used during funeral)
   - burial plans
   - flowers for funeral

3. CATERED AFFAIRS, including —
   - bridal showers
   - parties
   - Bar Mitzvah
   - weddings
   - graduations
   - Bat Mitzvah
   - anniversaries
   - confirmations

4. FRESH FLOWERS OR POTTED PLANTS

5. PROFESSIONAL PHOTOGRAPHY FEES

6. SERVICES OF LAWYERS AND OTHER LEGAL PROFESSIONALS, including —
   - Will
   - Civil litigation, including lawsuits,
   - Divorce
   - bankruptcies, etc.
   - Bails bonds
   - Contracts
   - Estate settlement
   - Criminal litigation, including traffic
   - Do not include fees for business purposes or those related to closing costs for the purchase of real estate.

7. ACCOUNTING FEES, including —
   - income tax
   - trust management
   - estate management
   - Do not include fees for business purposes.

8. OCCUPATIONAL EXPENSES, such as union dues or professional licenses.

HOME SERVICES PROVIDED BY NON-CU MEMBER

9. GARDENING OR LAWN CARE SERVICES, including —
   - fertilize lawn, etc.
   - lawn cutting
   - hedge trimming
   - tree removal
   - tillng
   - tree pruning
   - planting
   - plowing
   - Include any services provided under service contracts.
   - Do not include services which are covered by management or maintenance fees.
Section 19 — MISCELLANEOUS EXPENSES — Continued

Part A — Miscellaneous Expenses — Continued

10 — HOUSEKEEPING SERVICES, including —
   cleaning  laundering  cooking
   window washing  carpet cleaning

11 — HOME SECURITY SYSTEM SERVICE FEES

12 — OTHER HOME SERVICES AND SMALL REPAIR JOBS AROUND THE HOUSE, NOT PREVIOUSLY REPORTED
   Include diaper service.

13 — MOVING, STORAGE, AND FREIGHT
   moving companies  mini-warehouses
   self storage units  cargo shipping
   Do not include expenses that are reimbursed by employer or other persons outside of the CU.

14 — BABYSITTING, NANNY SERVICES, OR OTHER CHILD CARE IN YOUR HOME
   Do not include nursery school care or care in a day care center.

15 — BABYSITTING, NANNY SERVICES, OR OTHER CHILD CARE IN SOMEONE ELSE’S HOME
   Do not include nursery school care or care in a day care center.

16 — CARE FOR INVALIDS, CONVALESCENTS, HANDICAPPED, OR ELDERLY PERSONS IN THE HOME
   Do not include institutional or medical care.

17 — ADULT DAY CARE CENTERS

18 — VIDEO AND COMPUTER HARDWARE, SOFTWARE, GAMEBOYS AND ACCESSORIES
   TV computer game  video game hardware  Playstation
   hardware  video games  X box

19 — TOYS AND GAMES
   games  trains  dart board
   infant toys  stuffed animals  dolls  action figures
   trucks

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Section 19 — MISCELLANEOUS EXPENSES — Continued

Part A — Miscellaneous Expenses – Continued

20 — ARTS AND CRAFTS KITS
- model kits
- needlepoint kits
- rug kits
- arts and craft supplies

21 — STAMP AND COIN COLLECTING
- stamp albums
- coin albums
- first day covers

22 — LOTTERIES AND GAMES OF CHANCE

23 — PURCHASE OF PETS, PET SUPPLIES, AND MEDICINE FOR PETS, including —
- aquarium
- tropical fish
- dog house
- collars
- hamster cage
- pet toys
- bird cage
- dog
- guinea pig
- cat
- bird
- hamster
- gerbil

24 — PET SERVICES, including —
- grooming
- kennels
- license

25 — VETERINARIAN EXPENSES FOR PETS
- vet insurance
Section 19 — MISCELLANEOUS EXPENSES – Continued

Part B — Contributions

Given any money by cash, checks, or given any gift cards to —

1 — COLLEGE STUDENTS LIVING AWAY FROM HOME
   Money to pay for tuition, room, board, books, fees, transportation, clothing, and entertainment expenses

2 — ANY OTHER PEOPLE NOT IN YOUR CU, such as —
   friends, street musicians, cash gifts at the office
   co-workers, birthday money, wedding money
   homeless persons, money to assist others

Paid any of the following —

3 — CHILD SUPPORT

4 — ALIMONY

Given any money by cash, checks, money orders or credit cards to benefit —

5 — EDUCATIONAL INSTITUTIONS
   alumni funds, scholarship funds
   educational endowments, school fund-raisers

6 — POLITICAL ORGANIZATIONS
   political parties, building funds
   political candidates, religious televisions/radio ministries
   Political Action Committees (PACs)

7 — RELIGIOUS ORGANIZATIONS, INCLUDING CHURCHES, TEMPLES AND MOSQUES, BUT NOT INCLUDING PAROCHIAL SCHOOLS
   tithes and offerings, building funds
   religious funds raisers, religious television/radio ministries

8 — CHARITIES AND ALL OTHER ORGANIZATIONS
   Red Cross, Humane Society
   civic organizations, American Cancer Society
   social service, American Heart Association
   organizations, fine arts and literary
   American Red Cross
   public television/radio organizations

9 — STOCKS, BONDS, MUTUAL FUNDS
   Include only funds given to persons or organizations outside of your CU
Section 20B — EXPENSE PATTERNS FOR SELECTED SERVICES AND GOODS

1 — COIN OPERATED LAUNDRY OR DRY CLEANING MACHINES
   clothing    quilts    linens
   coats       rugs      drapes

2 — LAUNDRY OR DRY CLEANING SERVICES
   clothing    quilts    linens
   coats       rugs      drapes

3 — CIGARETTES

4 — OTHER TOBACCO PRODUCTS
   cigars       pipe tobacco    chewing tobacco

5 — HAIRCUTTING, STYLING, MANICURES, MASSAGES AND OTHER SALON SERVICES
   hair coloring    pedicures    facials
   waxing

6 — SAFE DEPOSIT BOX LOCATED IN A BANK OR SIMILAR FINANCIAL INSTITUTION

7 — CHARGES OR FEES FOR PERSONAL FINANCIAL SERVICES SUCH AS ATM FEES OR ACCOUNT SERVICE CHARGES FROM FINANCIAL INSTITUTIONS SUCH AS BANKS, CREDIT UNIONS, AND FINANCE COMPANIES —
   ATM fees
   certified check fee
   check cashing fee
   check ordering fee
   regular service charges
   money order fee
   below minimum balance fee
   check order fee
   online banking and bill payment fee
   fees for personal loans, excluding those for real estate management fee for trust, custodial or escrow accounts

8 — TAXI OR LIMOUSINE SERVICE

9 — MASS TRANSPORTATION SERVICES SUCH AS A BUS, SUBWAY, MINI-BUS OR TRAIN
Section 21 — CREDIT LIABILITY

Credit Balances

1 — Gasoline credit cards — Shell, Exxon, Citgo, etc.

2 — Store credit cards — Department, Speciality, Electronic, or Sporting Goods

3 — Major credit cards — Visa, MasterCard, American Express, Discover, or other revolving credit accounts

4 — Store installment credit accounts

5 — Financial institutions — Banks, brokerages, savings and loans, credit unions, or insurance companies

Do not include insurance premium payments

6 — Doctors, dentists, hospitals, or other medical practitioners for expenses not covered by insurance

7 — Other credit — School loans, personal loans, or loans from retirement plans
Section 22 — OCCUPATIONS

01 — ADMINISTRATOR, MANAGER
administrator manager funeral director

02 — TEACHER
teacher guidance counselor

03 — PROFESSIONAL
registered nurse computer systems analyst social worker lawyer
engineer physician clergy

04 — ADMINISTRATIVE SUPPORT, INCLUDING CLERICAL
secretary bookkeeper clerk
computer assistant receptionist typist

05 — SALES, RETAIL
cashier motor vehicle salesperson door to door salesperson
commodity salesperson apparel salesperson

06 — SALES, BUSINESS GOODS AND SERVICES
mining sales representative real estate sales person
financial services wholesale sales representative
manufacturing sales representative insurance salesperson

07 — TECHNICIAN
health technician practical nurse clinical laboratory technician
drafting electronic technician

08 — PROTECTIVE SERVICE
private guard police officer firefighter

09 — PRIVATE HOUSEHOLD SERVICE
nanny household worker

10 — OTHER SERVICE
janitor cook waiter/waitress
food preparer food counter/fountain worker orderly
child care worker hairstylist maid/houseman

11 — MACHINE OPERATOR, ASSEMBLER, INSPECTOR
machine operator assembler inspector

12 — TRANSPORTATION OPERATOR
truck driver bus driver tractor operator

13 — HANDLER, HELPER, LABORER
stock handler freight handler material handler
construction laborer packager

14 — MECHANIC, REPAIRER, PRECISION PRODUCTION
automobile mechanic machine repairer machinist
sheet metal worker meat cutter tailor

15 — CONSTRUCTION, MINING
carpenter electrician painter
plumber mining worker

16 — FARMING
farmer farm worker

17 — FORESTRY, FISHING, GROUNDSKEEPING
forestry worker fisher groundskeeper
animal caretaker

18 — ARMED FORCES
armed forces
## Section 22 — WORK EXPERIENCE AND INCOME

### CARD A

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CARD B

1. Less than $300
2. $ 300 — $ 399
3. $ 400 — $ 499
4. $ 500 — $ 599
5. $ 600 — $ 699
6. $ 700 — $ 799
7. $ 800 — $ 899
8. $ 900 — $ 999
9. $ 1,000 — $ 1,499
10. $ 1,500 and over
Section 22 — WORK EXPERIENCE AND INCOME

CARD C

0. Loss

1. $0 — $999

2. $ 1,000 — $ 1,999

3. $ 2,000 — $ 2,999

4. $ 3,000 — $ 3,999

5. $ 4,000 — $ 4,999

6. $ 5,000 — $ 9,999

7. $10,000 — $14,999

8. $15,000 — $19,999

9. $20,000 — $29,999

10. $30,000 — $39,999

11. $40,000 — $49,999

12. $50,000 and over
1. Loss
2. Under $3,000
3. $3,000 — $5,999
4. $6,000 — $7,499
5. $7,500 — $9,999
6. $10,000 — $12,999
7. $13,000 — $14,999
8. $15,000 — $19,999
9. $20,000 — $24,999
10. $25,000 — $29,999
11. $30,000 — $34,999
12. $35,000 — $49,999
13. $50,000 — $74,999
14. $75,000+
# CALENDAR

## 2005

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PRIVACY ACT STATEMENT

The U.S. Census Bureau is conducting the Consumer Expenditure Surveys for the Bureau of Labor Statistics of the U.S. Department of Labor under title 29, United States Code. The surveys’ purpose is to obtain information on what Americans are purchasing in order to update the Consumer Price Index (CPI). All survey information will be used for statistical purposes only.

Any information you provide for this survey is confidential, by law, under title 13, United States Code. Participation in this survey is voluntary and there are no penalties for refusing to answer any question(s). However, your cooperation is extremely important to help insure the completeness and accuracy of these data.

INTRODUCTIONS

(1st visit)

"Good morning. I am (your name) from the U.S. Census Bureau. Here is my identification card. We are conducting a Consumer Expenditure Survey for the Bureau of Labor Statistics. I have some questions I would like to ask you. Did you receive a letter saying someone would call on you?"

(2nd through 5th visits)

"Good morning. I am (your name) from the U.S. Census Bureau. Here is my identification card. I was here in (month) to obtain information for the Consumer Expenditure Survey. This is my (number) quarterly visit. I have some questions to ask. Did you receive our letter?"