

# Consumer Expenditure Surveys

Quarterly Interview Survey

## Information Booklet



U S C E N S U S B U R E A U

*Helping You Make Informed Decisions*

CE-305  
(4-1-2009)

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## Hispanic Origin

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- 1 – Mexican
- 2 – Mexican-American
- 3 – Chicano
- 4 – Puerto Rican
- 5 – Cuban
- 6 – Cuban-American
- 7 – Central or South American
- 8 – Other

## Race

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**(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

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



## Education

- 0** – Never attended, preschool, kindergarten
- 1 - 11** – 1<sup>st</sup> grade through 11<sup>th</sup> grade
- 38** – 12<sup>th</sup> 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
- 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)

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## Armed Forces

A person is considered to be in the armed forces if he or she serves 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 all units occupying the same level or levels)
- 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
- 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

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Cooking stove, range, or oven

Microwave oven

Refrigerator or home freezer

Built-in dishwasher

Portable dishwasher

Garbage disposal

Clothes washer

Clothes dryer

Television

Home computer

Stereo or sound systems

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, including timeshares
- 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  
Real estate listing fees



## 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  
Real estate listing fees



## SECTION 3 – OWNED LIVING QUARTERS AND OTHER OWNED REAL ESTATE (continued)

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### Mortgage Payment Items

- |                           |   |
|---------------------------|---|
| <b>1</b> – Principal      | <b>4</b> – Property insurance           |
| <b>2</b> – Interest       | <b>5</b> – Mortgage guarantee insurance |
| <b>3</b> – Property taxes | <b>6</b> – Any other payments (Specify) |



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### 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
- 8** – Security, including guards and alarm systems
- 9** – Utilities, such as gas, electricity, water, heat
- 10** – Trash collection
- 11** – Other (Specify)



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### Homeowners' Associations or Condominium 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)





# SECTION 4 – UTILITIES AND FUELS FOR OWNED AND RENTED PROPERTIES

## Part A – Telephone Expenses

### Telephone services included in bill

- 1 – Residential Service
- 2 – Mobile/Cellular Service
- 3 – Voice Over IP

### Other telephone and non-telephone service items

- 1 – Internet access (including broadband, DSL, or dial-up)
- 2 – Cable or satellite television services
- 3 – Non-telephone related rentals or purchases such as a modem



## Part C – Internet Service Expenses

- 1 – Cable or satellite TV, not already reported
  - Cable TV      Direct TV      Dish TV      TiVo
- 2 – Satellite radio services
  - Sirius Radio      XM Radio
- 3 – Internet connection or internet service providers, not already reported
  - AOL      Road Runner      ISPs      Comcast      Verizon
- 4 – Listening to or downloading music or audio files
  - Napster      iTunes      Rhapsody
- 5 – Viewing or downloading video files
- 6 – Online games or other internet entertainment sites
- 7 – Internet services away from home such as web cafes or internet kiosks



## Part D – Utilities, Fuels, and Services

- 1 – Electricity
- 2 – Natural or utility gas
- 3 – Fuel oil
- 4 – Bottled or tank gas
- 5 – Other fuels
- 6 – Piped-in water
- 7 – Sewerage maintenance
- 8 – Trash/garbage collection including:
  - hazardous waste collection
  - waste disposal
  - recyclable material collection
- 9 – Water softening service
- 10 – Septic tank cleaning



# SECTION 5 – CONSTRUCTION, REPAIRS, ALTERATIONS AND MAINTENANCE OF OWNED AND RENTED PROPERTY

## 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 grounds or planting new shrubs or trees
- 6 – Building outdoor patios, walks, fences, or other enclosures, driveways, permanent swimming pools, or hot tubs
- 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 windows or window panes, screens, storm doors, awnings, and the like
- 19 – Masonry, brick, or stucco work
- 20 – Other improvements or repairs (include security systems that are hard-wired into the home)



Section 5 - CONSTRUCTION, REPAIRS, ALTERATIONS  
AND MAINTENANCE OF OWNED AND RENTED PROPERTY  
continued

# SECTION 5 – CONSTRUCTION, REPAIRS, ALTERATIONS AND MAINTENANCE OF OWNED AND RENTED PROPERTY (continued)

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## Appliances


- 1** – Cooking stove, range, or oven
- 2** – Microwave oven
- 3** – Refrigerator or home freezer
- 4** – Dishwasher – built-in
- 5** – Dishwasher – portable
- 6** – Garbage disposal
- 7** – Clothes washer
- 8** – Clothes dryer
- 9** – Range hood
- 10** – Smoke alarms and detectors
- 11** – Trash compactor
- 12** – Window air conditioner
- 13** – Portable cooling and heating equipment, including portable dehumidifiers, humidifiers, fans, and space heaters; excluding window air conditioners
- 14** – Other major home appliances and equipment

# SECTION 6 – APPLIANCES, HOUSEHOLD EQUIPMENT AND OTHER SELECTED ITEMS

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## Part A – Major Household Appliances

- 1 – Microwave oven
- 2 – Cooking stove, range, or oven  
(including convection oven)
- 3 – Range hood
- 4 – Refrigerator or home freezer
- 5 – Built-in dishwasher
- 6 – Portable dishwasher
- 7 – Garbage disposal
- 8 – Clothes washer  
(including washer/dryer combinations)
- 9 – Clothes dryer



Section 6 – APPLIANCES, HOUSEHOLD  
EQUIPMENT AND OTHER SELECTED ITEMS  
continued

# 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	electric frying pan	mixer
breadmaker	electric iron	pizza oven
coffee grinder	electric knife	popcorn maker
coffee maker	electric timer	rice cooker
crockpot	electric wine chiller	sandwich grill
deep fryer	electric wok	slow cooker
electric barbecue	food processor	smoothie maker
electric can opener	hot plate	toaster
electric grill	ice cream maker	toaster oven
electric fondue set	juicer	waffle iron

#### **2 – Electrical personal care appliances, including –**

curling iron	electric toothbrush	make-up mirror
denture cleaner	facial sauna	massager
electric hair trimmer	foot bath	water-pik
electric razor	hair dryer	
digital scale	heating pad	

#### **3 – Smoke detectors, including –**

wired	battery operated	ionization chamber type	photo-cell type
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#### **4 – Electrical floor cleaning equipment, including –**

vacuum cleaner	hand vacuum	rug shampooer	floor polisher
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#### **5 – Other household appliances, including –**

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

#### **6 – Sewing machines (with or without cabinet)**

#### **7 – Office machines including fax machines and calculators, also including –**

typewriters	copy machines
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#### **8 – Personal Digital Assistant or PDAs, including –**

Palm	iPaq
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## SECTION 6 – APPLIANCES, HOUSEHOLD EQUIPMENT AND OTHER SELECTED ITEMS (continued)

### Part B – Household Appliances and Other Selected Items (continued)

**9 – Computers, computer systems, or related hardware for non-business use, including –**

CD/DVD drive	cables	home computers with or without monitors
computer printers	fax modems	external hard drive
keyboards	scanner	CD/DVD burner
modems	memory	mouse
monitors	Micro PC	laptops

**10 – Computer software, including computer games, or accessories, for non-business use, including –**

PC games	printer cartridges	mouse pads
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**11 – Video game hardware, video games, or accessories, including –**

Nintendo Wii	Gamecube	Nintendo DS	PSP
Gameboy	Playstation	Xbox	

**12 – Telephones or accessories, including –**

telephones	headsets	cordless telephones	car chargers
beepers	chargers	cell phone covers	cell phones
phone jacks and cords	paggers	Bluetooth accessories	

**13 – Telephone answering machines, including –**  
combinations of telephone/answering machines

**14 – Photographic equipment, including –**

camera	filter	projection screen	battery pack for camera flash
digital camera	winder	electro flash	motor driven film advancer
lens	enlarger	strobe light	
tripod	projector	(for photographs)	

*Do not include film, film processing, or other photographic supplies.*

**15 – Musical instruments, supplies, or accessories, including –**

piano	sheet music	saxophone	music books
guitar	strings for musical instruments	music stand	trumpet
woodwinds		clarinet	any other musical accessories
brass instruments	stringed instruments	picks	carrying case
trombone		rosin	keyboards
reeds	valve oil	drums	

*Do not include music lessons.*

Section 6 – APPLIANCES, HOUSEHOLD  
EQUIPMENT AND OTHER SELECTED ITEMS  
continued

## SECTION 6 – APPLIANCES, HOUSEHOLD EQUIPMENT AND OTHER SELECTED ITEMS (continued)

### Part B – Household Appliances and Other Selected Items (continued)

#### 16 – Lawnmowing machinery or other yard equipment, including –

lawn mowers	motorized tiller	snow blower	shovel
tractor (farm, garden, etc.)	wheelbarrow	electric lawn trimmer	spreader
	rake		

### TOOLS FOR HOME USE

#### 17 – Power tools, including –

electric drill	sander	cordless circular saw
electric saw	lathe	electric swimming pool cleaning equipment
router	electric plane	air compressor
cordless drill	electric polisher	

#### 18 – Nonpower tools including –

wrench	axe	saw	drill
socket	screwdriver	level	trouble light
hammer	pliers	plane	caulking gun

### HEATING AND COOLING EQUIPMENT

#### 19 – Window air conditioners

#### 20 – Portable cooling or heating equipment, including –

space heater	dehumidifier	humidifier	fan
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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 on vehicles)**

**21 – Televisions, all types including combinations of TVs with DVD/video players, including –**  
flat screen TV                      plasma TV                      high definition TV

**22 – DVD players, VCRs, DVRs, or video cameras, including –**  
TiVo unit    digital TV converter box  
Blu-ray disc player                              video tape recorder/player  
high definition disc player                      video laser disc player  
combination of VCR/DVD player              video cassette recorder/player

**23 – Satellite dishes, receivers, or accessories**

**24 – Handheld personal music players, including –**  
iPod    personal mp3 players

**25 – Radio, all types, including –**  
CB (not permanently                      clock radio                      short-wave                      transistor/portable  
mounted in an                      console                      walky-talky                      Walkman (radio only)  
automobile)

**26 – Tape recorders or players (not permanently mounted in an automobile), including –**  
audio tape decks                      audio cassette players/recorders  
reel-to-reel tape decks                      Walkman (cassette/radio combination or cassette only)

**27 – Sound components, component systems, or compact disc sound systems, including –**  
speakers    amplifier    tape deck (not specified)  
mixer    turntable    compact disc players  
stereo    receiver    stereo rack system  
tuner    equalizer

**28 – Other sound or video equipment, including –**  
earphones/headphones                      battery packs    adapter for sound equipment  
power converter                                      power booster    base station CB antenna  
antenna (TV, radio, etc.)                      headset    microphone

Section 6 – APPLIANCES, HOUSEHOLD  
EQUIPMENT AND OTHER SELECTED ITEMS  
continued



## SECTION 6 – APPLIANCES, HOUSEHOLD EQUIPMENT AND OTHER SELECTED ITEMS (continued)

### Part B – Household Appliances and Other Selected Items (continued)

#### **29 – Portable memory, such as flash drives, memory cards, and recordable discs and tapes, including –**

thumb drives	blank DVDs	blank CDs
zip drives	memory stick	USB flash drive

### **SPORTS, RECREATION, AND EXERCISE EQUIPMENT**

#### **30 – 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	golf shoes	golf cart (non-riding)	

*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.*

#### **31 – Health and exercise equipment, including –**

trampoline	exercise mat	weight bench
weights	home gym	treadmill
rowing machine	exercycle	pedometer

#### **32 – Camping equipment, including –**

tent	sleeping bag	camping stove
kerosene lamp	sleeping pad	camping cookware
frame packs and other camping packs	air mattress	portable heater
	canteen	

#### **33 – Hunting and fishing equipment, including –**

fishing rod and tackle	knife	BB/pellet gun
bow and arrow	rifle	ammunition
crossbow	shotgun	scopes (not specified)

#### **34 – Winter sports equipment, including –**

snow skis	ski poles	toboggan
ski boots	ice skates	sled
snowboard	ice boat	
snowboard equipment	sledding equipment	

## SECTION 6 – APPLIANCES, HOUSEHOLD EQUIPMENT AND OTHER SELECTED ITEMS (continued)

### Part B – Household Appliances and Other Selected Items (continued)

#### 35 – Water sports equipment, including –

water skis	snorkel	surf board
life jacket	water ski vest	raft
wake board	diving equipment	wind surf board

#### 36 – Outboard motors

#### 37 – Bicycles, including –

bicycle helmets	stand	tires	tubes
bicycle parts	locks	rack	supplies

#### 38 – Tricycles or battery powered riders, including – big wheels

#### 39 – Playground equipment, including –

portable swimming pool	swing set	sand box	gym set
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#### 40 – Other sports or recreation equipment, including –

telescope	metal detector
paintball equipment	

## SECTION 7 – HOUSEHOLD ITEM 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
  - 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 (including bicycles)
- 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                      loveseat                      sectionals                      futon

#### 2 – Living room chairs, including –

recliner                      convertible chair                      rocker  
bean bag chair                      swivel

#### 3 – Living room tables, including –

coffee table                      end tables                      TV table                      lamp table

#### 4 – Wall units, shelves, or cabinets, including –

bookcase                      curio cabinet                      entertainment center

#### 5 – Ping-pong tables, pool tables, and other similar recreation room items

#### 6 – Other living room, family room, or recreation room furniture, including –

room divider                      bar stools                      desk/chair                      card table/chairs  
coat rack                      gun cabinet                      bar or portable bar                      foot stool (ottoman)

#### 7 – Living room furniture combinations, including –

sofa, chair, and table combinations or suites

### DINING ROOM AND KITCHEN FURNITURE

#### 8 – All dining room and kitchen furniture, including –

dinette set                      buffet                      serving table or cart  
kitchen chairs                      china cabinet                      dining table and chairs

### BEDROOM FURNITURE

#### 9 – Mattresses and springs, including rollaways

#### 10 – Bedroom furniture other than mattresses and springs, including –

headboard                      dresser                      mirrors                      bunk bed  
brass bed                      vanity                      chairs                      night tables  
frames                      cedar chest                      armoire                      water bed  
chest                      mattress topper

## 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	changing table
playpen	dresser	bassinet	portable crib
high chair	chest		

##### 12 – Infants equipment, including –

carriage	guard rail	baby monitor	baby bottle sterilizer
stroller	swing	baby jogger	baby travel systems
car seat	baby carriers	baby backpack	

#### OUTDOOR FURNITURE AND EQUIPMENT

##### 13 – Patio, porch, or outdoor furniture, including –

patio umbrella

##### 14 – Barbecue grills or outdoor decorative items, including –

patio lanterns	patio statues	bird houses
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#### 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.*

# SECTION 8 – HOME FURNISHINGS AND RELATED HOUSEHOLD ITEMS (continued)

## Part A – Purchases (continued)

### HOUSEHOLD DECORATIVE ITEMS

#### 16 – Lamps and other lighting fixtures, including chandeliers

#### 17 – Other household decorative items, including –

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

### CLOSET STORAGE AND TRAVEL ITEMS

#### 18 – Closet storage items, including –

garment bag	shoe bag	shoe rack
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#### 19 – Travel items including luggage, also including –

travel garment bags	trunk	attaché cases
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### DISHES, DINNERWARE, FLATWARE, GLASSWARE, AND COOKWARE

#### 20 – Plastic dinnerware, including Tupperware

#### 21 – China and other dinnerware

#### 22 – Stainless, silver, and other flatware, except plastic

#### 23 – Glassware, including crystal

#### 24 – Serving pieces other than silver

#### 25 – Nonelectric cookware, including –

skillet	roaster	pots	pressure cooker
saucepan	pans	teakettle	casserole dishes

#### 26 – Silver serving pieces, including –

tray	pitcher	bowl
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Section 8 - HOUSEHOLD FURNISHINGS  
AND RELATED HOUSEHOLD ITEMS  
continued

## SECTION 8 – HOME FURNISHINGS AND RELATED HOUSEHOLD ITEMS (continued)

### Part A – Purchases (continued)

#### HOUSEHOLD LINENS

##### 27 – Bedroom linens, including –

sheets	comforter	baby blanket	blanket
pillowcases	mattress pad	electric blanket	bedspread
pillows	quilt	duvet	

##### 28 – Bathroom linens, including –

towels	shower curtain	bath mat	toilet cover
face cloths	bath rug	tub mat	

##### 29 – Kitchen and dining room linens, including –

tablecloths	cloth napkins	placemats	small appliance covers
dish towels	dish cloths		

##### 30 – Other linens, including –

doilies	chair pads	furniture protectors	covers for living room tables
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##### 31 – Slipcovers, decorative pillows and cushions, custom or ready-made

#### FLOOR AND WINDOW COVERINGS

##### WALL-TO-WALL CARPETING FOR ONE OR MORE ROOMS

##### 32 – Original wall-to-wall carpet (original)

##### 33 – Wall-to-wall carpet (replacement)

##### 34 – Room-size rugs and other non-permanent floor coverings, including carpet squares

##### 35 – Curtains and drapes (either custom or ready-made)

##### 36 –Blinds, shades, and other window coverings (either custom or ready-made)

# SECTION 9 – CLOTHING AND SEWING MATERIALS

## Part A – Clothing

*Do not include clothing for children under 2 years of age.*

### 1 – Coats, jackets, and furs, including –

shawl	raincoat	fur coat	winter coat
windbreaker	down vest	outerwear jacket	

### 2 – Sport coats and tailored jackets, including blazers

### 3 – Suits, including –

woman's suit (of two or more pieces)	formal suit
man'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, jeans, or shorts, including –

jump suit	blue jeans	maternity pants	dress slacks
dress pants	overalls	short sets	casual pants

*Do not include any athletic shorts.*

### 7 – Dresses, including –

two-piece dresses	wedding gown	maternity dresses	formals or semi-formals
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### 8 – Skirts, including skorts

*Do not include any tennis skirts, golf skirts, or other athletic skirts.*

### 9 – Shirts, blouses, and tops, including –

sport shirts	tops	maternity tops
dress shirts	knit blouses	T-shirts

*Do not include any sweat shirts or athletic shirts.*

### 10 – Undergarments, including –

bras	undershirts	slips
shapewear	underwear	thermal underwear

### 11 – Hosiery, including –

socks	knee-highs	tights	pantyhose
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### 12 – Nightwear and loungewear, including –

pajamas	night shirt	night gown
robe	house coat	thermal sleeping garments

Section 9 – CLOTHING AND SEWING MATERIALS  
continued



## SECTION 9 – CLOTHING AND SEWING MATERIALS (continued)

### Part A – Clothing (continued)

*Do not include clothing for children under 2 years of age.*

#### 13 – Accessories, including –

umbrellas	gloves	apron	fold-up rain accessories
belts	mittens	ear muffs	bandannas
ties	purse	handkerchiefs	hair accessories
scarves	wallet	bridal headpiece	non-prescription sunglasses

#### 14 – Swimsuits or warm-up or ski suits, including –

athletic shorts	tennis outfit	sweatshirt	swimwear accessories
athletic shirt	jogging suit	swimwear	snow and ski suit
hunting wear	leotards		

*Do not include any sports uniforms.*

#### 15 – 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

#### 16 – Costumes, including costumes for dance, ballet, Halloween, etc.

#### 17 – Footwear, including –

dress shoes	sandals	bedroom slippers
casual shoes	boots	sneakers, jogging, aerobic, basketball, tennis 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 children under 2 years of age)

#### 1 – Coats, jackets, or snowsuits

#### 2 – Dresses and other outerwear, including –

bathing suits	sweater	pants	T-shirts
sunsuit	romper	pants set	jeans
jumpsuit	overalls	short set	vest
shirt	crawler	playsuit	jogging suit
tops			

#### 3 – Underwear and diapers, including disposable

*Do not include diaper service.*

#### 4 – Sleeping garments

#### 5 – Layettes

#### 6 – Accessories, including –

boots	socks	booties	caps/hats
mittens/gloves	shoes	bibs	bonnets
slippers			

### 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

# 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 outside the home**

## 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 clothes**

**3 – Sewing notions, including –**

sewing basket	patterns	buttons	thread
sewing kit	crochet hooks	measuring tapes	knitting needles, equipment
crochet thread	scissors	zipper	embroidery hoops
seam binding	snaps	needles/pins	embroidery thread

**4 – Other sewing materials, including –**

interfacing	fiberfill	stuffing	beads, glitter, sequins
quilt pad	foam	rug material	felt or felt squares

## SECTIONS 10 and 11 – RENTED, LEASED, AND OWNED VEHICLES

- 1 – Automobile
- 2 – Truck, minivan, van, and SUV
- 3 – Motor home
- 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 airplane
- 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)

# SECTION 12 – VEHICLE OPERATING EXPENSES

## 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 –

air/fuel filters	computer sensor	ignition wires	ignition timing or mixture
distributor cap, rotor	PCV valve	valve adjustment	adjustment
emission controls	spark plugs		breather/vapor/air filter element

### 3 – Brake work, including –

anti-lock brakes	hydraulic system	shoes or pads	bleed brake system
master cylinder	wheel calipers	wheel cylinder	machine drums/rotors
brake adjustment	parking brake		

### 4 – Battery purchase or installation

### 5 – Tire purchase or mounting

### 6 – Tire repairs

### 7 – Front end alignment, wheel balancing, wheel rotation

### 8 – Steering or front-end work, including –

axel bearing/seals	bushings	studs/lug nuts	power steering fluid/filter
axle shafts	CV joints/boots	tie rods	idler arms
rack and pinion	wheel hubs	ball joints	steering box/linkage

### 9 – Electrical system work, including –

alternator belt	car computer	ignition system	voltage regulator
alternator/generator	coil	starter motor	gauges/instruments
battery charge	switches	wiring	

### 10 – Engine repair or replacement, including –

carburetor	fuel injector	motor mounts	timing chain/gears or belt
fuel pump/lines/filter	turbo charge	pistons/rods	oil pump/cooler/hoses
crankshaft bearings	gaskets	choke	

### 11 – Air conditioning work, including –

compressor	condenser	motor/switch	recharging
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### 12 – Engine cooling system work, including –

coolant or filter	heater core	radiator	fan or water pump belt
hoses	thermostat	water pump	cooling fan/controls
pressure cap	cooling fan relay	fan switch or belt	

## SECTION 12 – VEHICLE OPERATING EXPENSES (continued)

### Part A – Vehicle Maintenance and Repair, Parts, and Equipment (continued)

#### 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 transmission	transaxle
clutch fork	master cylinder	safety switch	transmission filter
flywheel	pilot bearing	shaft seal	

#### 15 – Body work or painting, including –

convertible top	doors	T-roof	crash repairs
glass replacement	vinyl top	rust proofing	window repair/replacement
sanding			

#### 16 – Shock absorber replacement, including MacPherson struts

#### 17 – Drive shaft or rear-end work, including –

axle fluid	CV joints	rear axle	suspension
differential	tie rods	grommet	rear wheel axle seal
rear wheel bearings	universal joint	coil or leaf springs	axle mounts/bushings

#### 18 – Video equipment or installation, including –

televisions and combinations of TVs with VCRs and/or DVD players Video game consoles	GPS navigational system with screen satellite receiver, In-Motion Satellite receiver
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#### 19 – Audio equipment or installation, including –

antenna	CB radio	speakers	tape player
CB antenna	radio	stereo equipment	satellite radio equipment

#### 20 – Vehicle accessories or customizing, including –

alarm system	carpeting	running boards	steering wheel covers
bike/ski racks	fender skirts	seat covers	spoilers
bumper guards	luggage rack		

#### 21 – Vehicle cleaning services or cleaning supplies, including –

car washes	vacuuming	cleaning mitts	vehicle detailing services
waxes	upholstery sprays	protective coating	wheel cleaning supplies
boat cleaning services			

#### 22 – Other vehicle services, parts, or equipment, including –

battery cables	vent filters	jack	charcoal canister filters
gas cable/cap/can	brake lights	gasket sets	windshield wipers
light bulbs	wheel lugs	headlights	speedometer cable
wheels/rims	hub caps	heater repair	tire/wheel combination
upholstery work			

Section 12 – VEHICLE OPERATING EXPENSES  
continued

## SECTION 12 – VEHICLE OPERATING EXPENSES (continued)

### Part B – Licensing, Registration, and Inspection of Vehicles

#### **1 – Driver’s licenses**

#### **2 – Vehicle inspection** emissions inspection safety inspection

#### **3 – State vehicle registration**

#### **4 – Local vehicle registration**

# SECTION 13 – INSURANCE OTHER THAN HEALTH

## 1 – Long term care insurance

## 2 – Life insurance or other policies which provide benefits in case of death or disability, including –

term insurance	income or disability insurance
whole-life insurance	group-life insurance
cash benefits	straight-life insurance
mortgage insurance	flight insurance
veterans insurance	life endowments
annuities	burial insurance

## HOME INSURANCE

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

## 3 – Homeowners' insurance, including any insurance covered in mortgage payments or flood insurance

flood insurance	fire and extended coverage
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## 4 – Renters' insurance

## 5 – Automobile or other vehicle insurance, including –

liability insurance	bodily injury insurance
collision insurance	property damage insurance
comprehensive insurance	no-fault insurance

## 6 – Other types of non-health insurance, including –

- credit card insurance
- personal liability insurance
- mortgage guarantee insurance
- ambulance
- umbrella policies

*Do not include malpractice insurance.*



# SECTION 14 – HOSPITALIZATION AND HEALTH INSURANCE

## 1 – Health Maintenance Organization

Expenses usually covered in full, or there may be a modest co-payment at the time of your visit.

- Group/staff type: You go to a central facility (group health center) to receive care.
- Independent practice association (IPA): Providers work from their individual offices (and are referred to as primary care physicians).

## 2 – Fee for Service Plan

You or your insurance company are generally billed after each visit.

- Traditional fee for service plan: You may go to any doctor or hospital you choose.
- Preferred Provider Organization (PPO): You are given a list of doctors from which to choose. If you go to a doctor on the PPO list, more expenses are covered than if you go to a doctor not on the list.

## 3 – Commercial Medicare Supplement

Voluntary contributory private insurance plan available to Medicare recipients. Covers the costs of deductibles, co-insurance, physician services, and other medical and health services.

## 4 – Special Purpose Plan

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	

*Do not include Medicare Prescription Drug plans.*

# SECTION 15 – MEDICAL AND HEALTH EXPENDITURES

## EYE CARE

### 1 – Eye examinations, treatment, or surgery, such as –

eye examinations      laser surgery      eye treatments

### 2 – Purchase of eye glasses or contact lenses, such as –

eye glasses      contact lenses      contact lens insurance  
warranty expenses      fittings      kits and equipment  
prescription sunglasses

## DENTAL CARE

### 3 – Dental care, such as –

examinations      bridges      root canals      teeth whitening in a  
cleanings      orthodontic work      X-rays      dental office  
dentures      caps or crowns      fillings      any other dental services

## INPATIENT CARE

### 4 – Hospital rooms or services, including –

anesthetics      injections      operating room      examinations  
blood transfusions      oxygen      intensive care unit      nursing services  
drugs and medicine      laboratory tests      recovery room      X-rays  
treatment rooms      therapy      any other services

### From facilities, such as –

general care hospitals      substance abuse hospitals  
psychiatric hospitals      birthing centers

Section 15 – MEDICAL AND HEALTH EXPENDITURES  
continued

# SECTION 15 – MEDICAL AND HEALTH EXPENDITURES (continued)

## SERVICES BY MEDICAL PROFESSIONALS OTHER THAN PHYSICIANS

### 5 – All services provided by medical professionals other than physicians, such as –

chiropractor	podiatrist	psychologist	substance abuse professionals
acupuncturist	midwife	homeopath	naturopath
marriage counselor	physical therapist	nurse practitioners	medical massage therapist (certified)

*Include services provided both inside and outside the home.*

## PHYSICIAN SERVICES

### 6 – All services provided and billed by physicians, such as –

general practitioner	internist	pediatrician	gynecologist
dermatologist	urologist	psychiatrist	any other type of physicians
surgeon	plastic surgeon	osteopath	

## OTHER MEDICAL CARE SERVICES

### 7 – Lab tests or x-rays

X-rays	blood tests	other types of lab tests
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*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

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

### 9 – Care for invalids, convalescents, handicapped, or elderly persons in the home

*Do not include institutional or medical care.*

### 10 – Adult day care centers

### 11 – Other medical care and outpatient services, such as –

ambulance services	blood donation	emergency room services
rescue services	outpatient hospital care	

*If medical care is given in outpatient department or emergency room, include -*

injections	electro cardiogram	baby shots	physicians check up
allergy shots	skin treatment	cardiology test	broken bones/sprains
hearing test	cancer treatment	blood pressure check	

# SECTION 15 – MEDICAL AND HEALTH EXPENDITURES (continued)

## MEDICINE OR MEDICAL SUPPLIES

### 12 – Purchase of hearing aids

### 13 – Prescription drugs

### 14 – Rental of supportive or convalescent medical equipment, such as –

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

### 15 – Purchase of supportive or convalescent medical equipment, such as –

braces	splints	whirlpools	crutches
cervical collars	slings	canes	wheelchairs
ace bandages	walkers	orthotics	power chair/scooter

### 16 – Rental of medical or surgical equipment for general use, such as –

ice bags	sinus masks	sun lamps	hot water bottles
blood pressure kits	heating pads	vaporizers	therapeutic heat lamps

### 17 – Purchase of medical or surgical equipment for general use, such as –

thermometers	sinus masks	sun lamps	therapeutic heat lamps
ice bags	insulin needles	hot water bottles	syringes
ostomy supplies	heating pads	blood pressure kits	oxygen
pollen masks	vaporizers	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	cooking	self defense
driving lessons	horseback riding		

## 2 – Nursery school or child day care centers, including non-instructional day camps

## 3 – Tuition, including –

college or university	business school	elementary school	high school
secretarial school	parochial school	seminary	technical school
adult education	vocational school	preparatory school	middle/junior high school

*Include only those expenses paid directly to the school or to other educational facility.  
Do not report student loans.*

## 4 – Housing while attending school, including –

student dormitory	sorority	fraternity	housing for married students
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*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 – Test preparation or tutoring services

## 8 – Purchase of any school books, supplies, or equipment, which has not already been reported, including –

text books	ruler	drafting equipment	laboratory equipment
microscopes	art supplies	technical books	cap and gown

## 9 – Other school related expenses not already reported, including the rental of any school books or expenses

laboratory fees	matriculation fees	transportation fees	conferences and seminars
registration fees	health fees	student union fees	
laundry fees	athletic fees	rental of school books	
cap and gown rentals	administration fees	rental of school equipment	

*Do not report student loans.*

# 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 – Vacation clubs
- 9 – Civic, service, or fraternal organization
- 10 – Credit card membership fees
- 11 – Shopping club memberships such as COSTCO and SAM'S
- 12 – Services that use Global Positioning Systems (GPS) such as OnStar, not already reported
- 13 – Direct or online dating services



Section 17 – SUBSCRIPTIONS, MEMBERSHIPS,  
BOOKS, AND ENTERTAINMENT EXPENSES  
continued

# SECTION 17 – SUBSCRIPTIONS, MEMBERSHIPS, BOOKS, AND ENTERTAINMENT EXPENSES (continued)

## Part B – Books and Entertainment Expenses

### **Fees for participation in sports, including –**

tennis                                      golf                                      bowling                                      swimming  
billiards

### **Single admissions to spectator sporting events, including –**

football                                      baseball                                      hockey                                      soccer  
auto racing                                      basketball

### **Single admissions to performances, including –**

movies                                      operas                                      plays                                      concerts

### **Single admissions to other entertainment activities, including –**

museums                                      zoos                                      state parks                                      amusement parks  
historic sites

### **Books not purchased through book clubs, including –**

paperbacks                                      hardcover                                      audio                                      digital books

*Exclude reference books or school books.*

### **Single copies of newspapers, magazines, periodicals (non-subscription)**

### **Compact discs, audio tapes, or records**

*Do not include blank or recordable CDs or blank or recordable audio tapes.*

### **Photographic film, including disposable cameras**

### **Photo processing, including –**

digital photo processing                                      video film processing

### **Purchase of video tapes or DVDs**

*Do not include blank or recordable DVDs or blank or recordable video tapes.*

### **Rental of video tapes or DVDs, including –**

mail delivery DVD rentals

# SECTION 18 – TRIPS AND VACATIONS

## 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 to a place at least 75 miles away

## Types of Transportation

### **COMMERCIAL**

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

### **RENTED**

- 6 – automobile
- 7 – truck, van
- 8 – motorcycle, moped
- 9 – private plane
- 10 – boat, trailer
- 11 – camper
- 12 – other vehicles

### **PRIVATE**

- 13 – automobiles or other vehicles privately owned or leased by CU
- 14 – vehicle owned by someone else
- 15 – other transport

Section 18 – TRIPS AND VACATIONS  
continued



## SECTION 18 – TRIPS AND VACATIONS (continued)

### Rental of Sports Equipment

- Golf clubs
- Skis/snowboards
- Fishing equipment
- Boat
- Scuba/snorkeling equipment
- Other sports equipment

### Fees for Exercising or Playing Sports

- Golf
- Fishing
- Swimming
- Tennis
- Skiing/snowboarding
- Bowling
- Exercise classes
- Scuba/snorkeling
- Other sports

### Entertainment or Admissions

- Movies
- Theater
- Concerts
- Museums
- Tours
- Sports events
- Other entertainment events

# SECTION 19 – MISCELLANEOUS EXPENSES

## Part A – Miscellaneous Expenses

### 1 – Fresh flowers or potted plants

### 2 – Professional photography

### 3 – Services of lawyers or other legal professionals, including –

will	divorce	civil litigation, including lawsuits,
bail bonds	contracts	bankruptcies, etc.
arbitration services	estate settlement	criminal litigation, including
mediation		traffic citations

*Do not include fees for business purposes or those related to closing costs for the purchase of real estate.*

### 4 – Accounting fees, including –

estate management	trust management	income tax preparation
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*Do not include fees for business purposes.*

### 5 – Occupational expenses, such as union dues or professional licenses

### 6 – Gardening or lawn care services, including –

fertilizing	lawn cutting	hedge trimming
tree removal	tilling	tree pruning
planting	plowing	

*Include any services provided under service contracts.*

*Do not include services that are covered by management or maintenance fees.*

### 7 – Housekeeping services, including –

cleaning	laundrying	cooking
window washing	carpet cleaning	

### 8 – Home security system service fees

### 9 – Other home services or small repair jobs around the house, not previously reported

*Include diaper service.*

### 10 – Moving, storage, or freight, including –

moving companies	mini-warehouses	self-storage units	cargo shipping
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*Do not include expenses that are reimbursed by employer or other persons outside of the CU.*

Section 19 – MISCELLANEOUS EXPENSES  
continued

## SECTION 19 – MISCELLANEOUS EXPENSES (continued)

### Part A – Miscellaneous Expenses (continued)

**11 – Stamp or coin collecting, including –**

stamp albums                      coin albums                      first day covers

**12 – Lotteries or games of chance**

**13 – Babysitting, nanny services, or other child care in YOUR home**

*Do not include nursery school care or care in a day care center.*

**14 – 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.*

**15 – Toys or games, including –**

games                      trains                      dart board                      action figures  
infant toys                      stuffed animals                      dolls                      trucks

**16 – Arts or crafts kits, including –**

model kits                      rug kits                      needlepoint kits                      arts and craft supplies

**17 – Purchase of pets, pet supplies, or medicine for pets, including –**

aquarium                      tropical fish                      dog house                      collars  
hamster cage                      pet toys                      bird cage                      dog  
guinea pig                      cat                      bird                      hamster  
gerbil

**18 – Pet services, including –**

grooming                      kennels                      license                      pet daycare  
pet resorts

**19 – Veterinarian expenses for pets, including –**

vet insurance                      veterinary treatment

**20 – Food and beverages for catered affairs**

bridal showers                      parties                      Bar/Bat Mitzvahs                      quinceañeras  
weddings                      graduations                      anniversaries                      confirmations

**21 – Live entertainment for catered affairs**

**22 – Rental of party supplies for catered affairs**

**23 – Purchase or upkeep of cemetery lots or vaults**

**24 – Funerals, burials, or cremation, including –**

burial fees                      flowers for funeral                      musician honoraria                      limousines (used  
burial plans                      clergy                      funeral transcript                      during funeral)  
headstones                      footstones

## 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	co-workers	homeless persons
street musicians	birthday money	wedding money
cash gifts at the office	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, including –**

alumni funds	educational endowments	parochial schools
scholarship funds	school fund-raisers	

##### **6 – Political organizations, including –**

political parties	political candidates	Political Action Committees (PACs)
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##### **7 – Religious organizations, including churches, temples, and mosques, including –**

tithes and offerings	religious fund raisers
building funds	religious television/radio ministries

##### **8 – Charities or all other organizations, including –**

Red Cross	civic organizations	American Cancer Society
fine arts and literary	United Way	American Heart Association
Humane Society		

#### **GIVEN ANY STOCKS, BONDS, OR MUTUAL FUNDS**

##### **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

### **Self-service laundry machines**

clothing	quilts	linens
coats	rugs	drapes

### **Laundry or dry cleaning services**

clothing	quilts	linens
coats	rugs	drapes

### **Cigarettes**

### **Other tobacco products**

cigars	pipe tobacco	chewing tobacco
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### **Haircutting, styling, manicures, massages and other salon services**

hair coloring	pedicures	facials
waxing	tanning salons	

### **Safe deposit box located in a bank or similar financial institution**

### **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	check order fee	
certified check fee	money order fee	online banking and bill payment fee
check cashing fee	regular service charges	below minimum balance fee

fees for personal loans, except those for real estate management fee for trust, custodial or escrow accounts

### **Taxi or limousine service**

### **Mass transportation services such as a bus, subway, mini-bus, or train**

## SECTION 21 – CREDIT LIABILITY

### **CREDIT BALANCES**

*Do not include mortgages, home equity loans, automobile loans, or business related loans.*

- 1 – Gasoline credit cards – Shell, Exxon, Citgo, etc.**
- 2 – Store credit cards – department, specialty, 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 – education 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                      accountant                      physician                      social worker                      computer systems  
lawyer                                  engineer                      clergy                      photographer                      analyst

### 04 – Administrative Support, including Clerical

secretary                              bookkeeper                      clerk  
receptionist                      computer assistant                      typist

### 05 – Sales, Retail

cashier                                  commodity salesperson                      door to door salesperson  
apparel salesperson                      motor vehicle salesperson

### 06 – Sales, Business Goods and Services

mining sales representative                      real estate salesperson  
financial services                      wholesale sales representative  
manufacturing sales representative                      insurance salesperson

### 07 – Technician

health technician                      practical nurse                      drafting                      clinical laboratory technician  
electronic technician

### 08 – Protective Service

private guard                      police officer                      firefighter

### 09 – Private Household Service

nanny                                  household worker

### 10 – Other Service (except private household)

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

### 11 – Machine Operator, Assembler, Inspector

machine operator                      assembler                      inspector

### 12 – Transportation Operator

truck driver                              bus driver                              tractor operator                      taxi driver

### 13 – Handler, Helper, Laborer

stock handler                              freight handler                              material handler                      packager                              construction laborer

### 14 – Mechanic or Repairer, Precision Production

automobile mechanic                      machine repairer                      machinist                              meat cutter                              sheet metal worker

### 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

## CARD A

- 0.** Loss
- 1.** \$ 0 – \$ 4,999
- 2.** \$ 5,000 – \$ 9,999
- 3.** \$ 10,000 – \$ 14,999
- 4.** \$ 15,000 – \$ 19,999
- 5.** \$ 20,000 – \$ 29,999
- 6.** \$ 30,000 – \$ 39,999
- 7.** \$ 40,000 – \$ 49,999
- 8.** \$ 50,000 – \$ 69,999
- 9.** \$ 70,000 – \$ 89,999
- 10.** \$ 90,000 – \$ 119,999
- 11.** \$ 120,000 and over



CARD B

- 0.** Less than \$300
- 1.** \$ 300 – \$ 399
- 2.** \$ 400 – \$ 499
- 3.** \$ 500 – \$ 599
- 4.** \$ 600 – \$ 699
- 5.** \$ 700 – \$ 799
- 6.** \$ 800 – \$ 899
- 7.** \$ 900 – \$ 999
- 8.** \$ 1,000 – \$ 1,499
- 9.** \$ 1,500 and over

## 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

# CALENDAR

## 2009

JANUARY						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

FEBRUARY						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

MARCH						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

APRIL						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

MAY						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

JUNE						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

JULY						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

AUGUST						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

SEPTEMBER						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

OCTOBER						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

NOVEMBER						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

DECEMBER						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

# CALENDAR

## 2010

JANUARY						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

JULY						
S	M	T	W	T	F	S
					1	2
					3	
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

FEBRUARY						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

AUGUST						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

MARCH						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

SEPTEMBER						
S	M	T	W	T	F	S
				1	2	3
				4		
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

APRIL						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

OCTOBER						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

MAY						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

NOVEMBER						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

JUNE						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

DECEMBER						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

# FRACTION CONVERSION CHART

## Fractions to Percentages

Fraction	%	Fraction	%	Fraction	%
1/2	50.00	1/7	14.29	3/9	33.33
1/3	33.33	2/7	28.57	4/9	44.44
2/3	66.67	3/7	42.86	5/9	55.55
1/4	25.00	4/7	57.14	6/9	66.67
2/4	50.00	5/7	71.42	7/9	77.78
3/4	75.00	6/7	85.71	8/9	88.89
1/5	20.00	1/8	12.50	1/10	10.00
2/5	40.00	2/8	25.00	2/10	20.00
3/5	60.00	3/8	37.50	3/10	30.00
4/5	80.00	4/8	50.00	4/10	40.00
1/6	16.67	5/8	62.50	5/10	50.00
2/6	33.33	6/8	75.00	6/10	60.00
3/6	50.00	7/8	87.50	7/10	70.00
4/6	66.67	1/9	11.11	8/10	80.00
5/6	83.33	2/9	22.22	9/10	90.00

## 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 survey's purpose is to obtain information on what Americans are purchasing in order to update the Consumer Price Index. 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 ensure the completeness and accuracy of these data.