

Detailed Single Year Tables

Category of Change: Coverage of Employment or Earnings, or Inclusion of Other Sources of Revenue

Proposed Provision: F6. Apply a separate 6.2 percent tax on investment income as defined in the Affordable Care Act (ACA), with unindexed thresholds as in the ACA (\$200,000 for single filer, \$250,000 for married filing jointly), starting in 2024. Proceeds go to the OASI and DI Trust Funds.

Proposal					Change from Current Law			
Expressed as a percentage of current-law taxable payroll					Expressed as a percentage of current-law taxable payroll			
Year	Cost Rate	Income		Trust Fund	Cost Rate	Income		Annual Balance
		Rate	Balance	Ratio		Rate	Balance	
				1-1-year				
2022	14.05	12.79	-1.26	230	0.00	0.00	0.00	0.00
2023	14.31	13.04	-1.27	211	0.00	0.00	0.00	0.00
2024	14.45	13.76	-0.68	194	0.00	0.81	0.81	0.81
2025	14.66	13.78	-0.87	182	-0.00	0.81	0.81	0.81
2026	14.88	13.90	-0.98	170	-0.00	0.82	0.82	0.82
2027	15.10	13.92	-1.18	158	-0.00	0.82	0.82	0.82
2028	15.33	13.97	-1.36	146	-0.00	0.83	0.83	0.83
2029	15.53	14.01	-1.52	133	-0.00	0.83	0.84	0.84
2030	15.72	14.04	-1.68	121	-0.00	0.84	0.84	0.84
2031	15.90	14.08	-1.83	108	-0.00	0.85	0.85	0.85
2032	16.07	14.10	-1.97	95	-0.00	0.86	0.86	0.86
2033	16.20	14.12	-2.09	83	-0.00	0.86	0.86	0.86
2034	16.32	14.13	-2.19	70	-0.00	0.87	0.87	0.87
2035	16.42	14.15	-2.27	57	-0.00	0.88	0.88	0.88
2036	16.50	14.16	-2.33	43	-0.00	0.89	0.89	0.89
2037	16.58	14.18	-2.40	30	-0.00	0.89	0.90	0.90
2038	16.64	14.19	-2.44	16	-0.00	0.90	0.90	0.90
2039	16.69	14.21	-2.48	1	-0.00	0.91	0.91	0.91
2040	16.72	14.22	-2.50	---	-0.00	0.92	0.92	0.92
2041	16.74	14.23	-2.51	---	-0.00	0.93	0.93	0.93
2042	16.76	14.24	-2.53	---	-0.00	0.94	0.94	0.94
2043	16.78	14.25	-2.53	---	-0.00	0.94	0.95	0.95
2044	16.80	14.26	-2.54	---	-0.00	0.95	0.95	0.95
2045	16.82	14.27	-2.55	---	-0.00	0.96	0.96	0.96
2046	16.84	14.28	-2.56	---	-0.00	0.97	0.97	0.97
2047	16.86	14.29	-2.58	---	-0.00	0.97	0.98	0.98
2048	16.89	14.30	-2.59	---	-0.00	0.98	0.98	0.98
2049	16.91	14.31	-2.61	---	-0.00	0.99	0.99	0.99
2050	16.95	14.31	-2.63	---	-0.00	1.00	1.00	1.00
2051	16.98	14.32	-2.65	---	-0.00	1.00	1.00	1.00
2052	17.01	14.33	-2.68	---	-0.00	1.01	1.01	1.01
2053	17.05	14.34	-2.71	---	-0.00	1.01	1.02	1.02
2054	17.10	14.35	-2.75	---	-0.00	1.02	1.02	1.02
2055	17.15	14.36	-2.79	---	-0.00	1.03	1.03	1.03
2056	17.20	14.37	-2.83	---	-0.00	1.03	1.03	1.03
2057	17.26	14.38	-2.88	---	-0.00	1.04	1.04	1.04
2058	17.32	14.39	-2.93	---	-0.00	1.04	1.04	1.04
2059	17.39	14.40	-2.98	---	-0.00	1.05	1.05	1.05
2060	17.45	14.41	-3.04	---	-0.00	1.05	1.05	1.05
2061	17.51	14.42	-3.09	---	-0.00	1.06	1.06	1.06
2062	17.57	14.43	-3.14	---	-0.00	1.06	1.06	1.06
2063	17.63	14.44	-3.18	---	-0.00	1.07	1.07	1.07
2064	17.68	14.45	-3.23	---	-0.00	1.07	1.07	1.07
2065	17.73	14.46	-3.27	---	-0.00	1.08	1.08	1.08
2066	17.78	14.47	-3.31	---	-0.00	1.08	1.08	1.08
2067	17.83	14.47	-3.36	---	-0.00	1.08	1.09	1.09
2068	17.89	14.48	-3.40	---	-0.00	1.09	1.09	1.09
2069	17.94	14.49	-3.45	---	-0.00	1.09	1.09	1.09
2070	18.00	14.50	-3.50	---	-0.00	1.10	1.10	1.10
2071	18.06	14.51	-3.55	---	-0.00	1.10	1.10	1.10
2072	18.11	14.52	-3.59	---	-0.00	1.10	1.11	1.11
2073	18.16	14.52	-3.64	---	-0.00	1.11	1.11	1.11
2074	18.21	14.53	-3.68	---	-0.00	1.11	1.11	1.11
2075	18.25	14.54	-3.72	---	-0.00	1.11	1.12	1.12
2076	18.29	14.54	-3.74	---	-0.00	1.12	1.12	1.12
2077	18.31	14.55	-3.76	---	-0.00	1.12	1.12	1.12
2078	18.32	14.55	-3.76	---	-0.00	1.13	1.13	1.13
2079	18.31	14.56	-3.76	---	-0.00	1.13	1.13	1.13
2080	18.30	14.56	-3.74	---	-0.00	1.13	1.13	1.13
2081	18.28	14.56	-3.71	---	-0.00	1.14	1.14	1.14
2082	18.24	14.56	-3.68	---	-0.00	1.14	1.14	1.14
2083	18.20	14.57	-3.64	---	-0.00	1.14	1.14	1.14
2084	18.16	14.57	-3.59	---	-0.00	1.14	1.15	1.15
2085	18.10	14.57	-3.54	---	-0.00	1.15	1.15	1.15
2086	18.05	14.57	-3.48	---	-0.00	1.15	1.15	1.15
2087	17.98	14.56	-3.42	---	-0.00	1.15	1.16	1.16
2088	17.91	14.56	-3.35	---	-0.00	1.16	1.16	1.16
2089	17.85	14.56	-3.29	---	-0.00	1.16	1.16	1.16
2090	17.79	14.56	-3.23	---	-0.00	1.16	1.16	1.16
2091	17.74	14.56	-3.18	---	-0.00	1.17	1.17	1.17
2092	17.70	14.56	-3.14	---	-0.00	1.17	1.17	1.17
2093	17.67	14.56	-3.11	---	-0.00	1.17	1.17	1.17
2094	17.65	14.56	-3.09	---	-0.00	1.17	1.17	1.17
2095	17.64	14.56	-3.08	---	-0.00	1.17	1.18	1.18
2096	17.64	14.57	-3.07	---	-0.00	1.18	1.18	1.18
2097	17.65	14.57	-3.08	---	-0.00	1.18	1.18	1.18

Summarized Estimates: Proposal				
	Cost Rate	Income Rate	Actuarial Balance	Year of reserve depletion ¹
2022				
-2096	17.20%	14.76%	-2.44%	2039

Summarized Estimates: Change from Current Law			
	Cost Rate	Income Rate	Actuarial Balance
	-0.00%	0.98%	0.98%

¹ Under current law, the year of Trust Fund reserve depletion is 2035.