

Summary Measures and Graphs

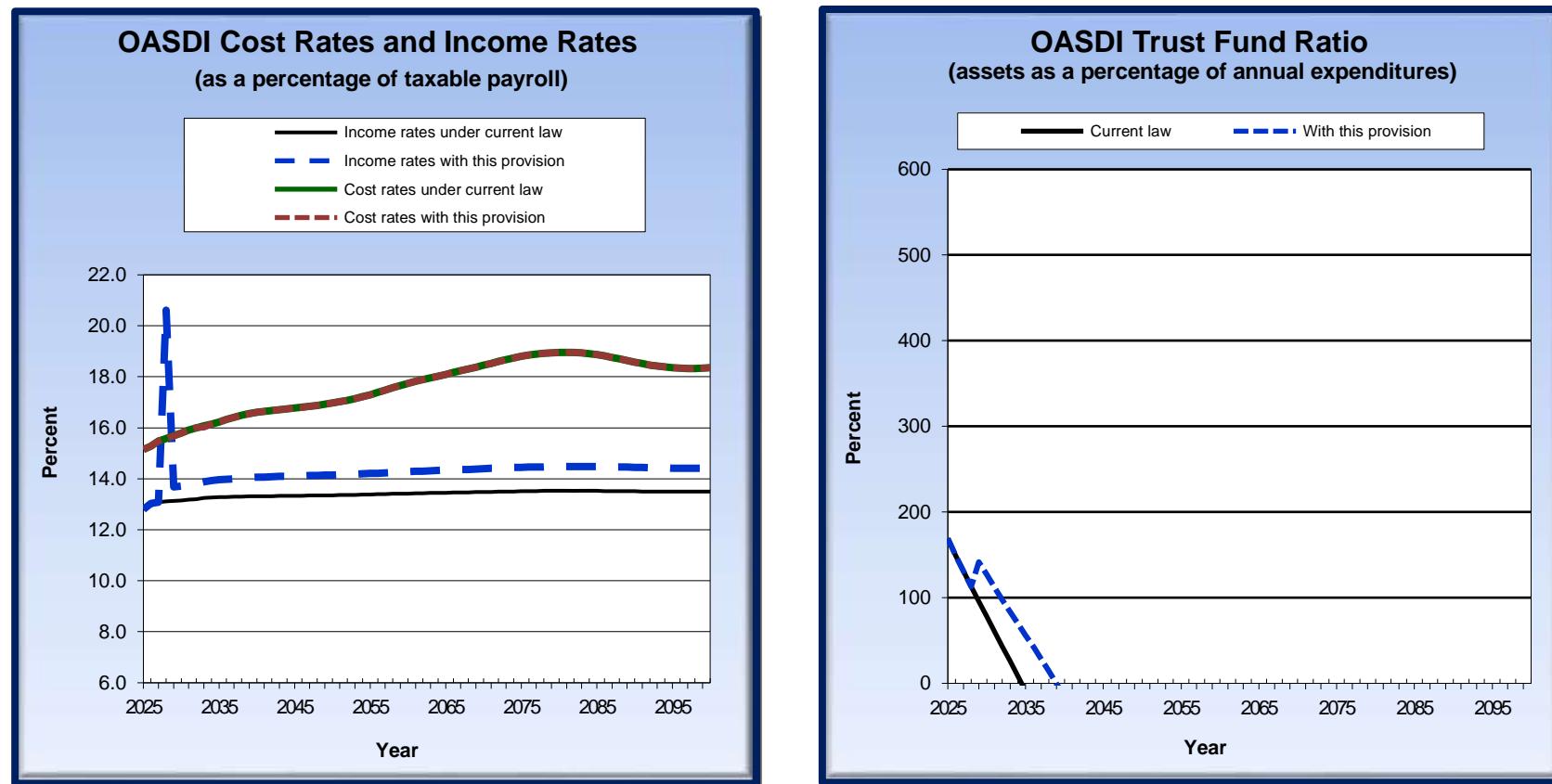
Category of Change: Taxation of Benefits

Proposed Provision: H8. Place all proceeds from taxation of Social Security benefits, including retrospective benefits, into the OASI and DI Trust Funds beginning on January 1, 2028.

Current law [percent of payroll]	
Long-range actuarial balance	Annual balance in 75th year
-3.82	-4.84

Change from current law [percent of payroll]	
Long-range actuarial balance	Annual balance in 75th year
0.90	0.93

Shortfall eliminated	
Long-range actuarial balance	Annual balance in 75th year
24%	19%



Estimates based on the intermediate assumptions of the 2025 Trustees Report

Office of the Chief Actuary
Social Security Administration
July 24, 2025