

Detailed Single Year Tables
Category of Change: Level of Monthly Benefits

Proposed Provision: B6.8. Starting in 2026, provide an additional monthly benefit equal to 1/12th of 2 percent of the AWI for the second prior year. This additional benefit would be available to those meeting any of the following four requirements: (a) Social Security beneficiaries who have attained age 82; (b) Social Security beneficiaries who have attained NRA and have both AIME at or below the first PIA bend point (\$1,174 for 2024 initial eligibility) and at least 11 "years of coverage" as used for Windfall Elimination Provision purposes (earnings above \$31,275 for 2024); (c) Individuals who have received Social Security benefits and/or SSI payments for at least 240 distinct months after attaining age 19; or (d) SSI recipients who have attained the Social Security NRA. This additional benefit would be paid out of the applicable Social Security OASI or DI Trust Fund for any month in which the individual is in receipt of a Social Security benefit; it would be paid out of the General Fund of the Treasury for any month in which the individual is in receipt of an SSI monthly payment but not a Social Security monthly benefit.

Year	Proposal			Trust Fund Ratio 1-1-year	Change from Current Law		
	Cost Rate	Income Rate	Annual Balance		Cost Rate	Income Rate	Annual Balance
2024	14.71	13.03	-1.68	188	0.00	0.00	0.00
2025	15.00	12.89	-2.11	171	0.00	0.00	0.00
2026	15.39	13.08	-2.31	150	0.18	0.01	-0.18
2027	15.55	13.12	-2.43	132	0.19	0.01	-0.18
2028	15.61	13.14	-2.47	114	0.20	0.01	-0.19
2029	15.67	13.17	-2.50	96	0.21	0.01	-0.20
2030	15.74	13.19	-2.55	79	0.22	0.01	-0.20
2031	15.80	13.21	-2.59	62	0.22	0.01	-0.21
2032	15.83	13.23	-2.60	45	0.23	0.01	-0.22
2033	15.90	13.28	-2.62	29	0.24	0.01	-0.23
2034	16.02	13.29	-2.73	13	0.25	0.01	-0.23
2035	16.14	13.30	-2.84	—	0.25	0.01	-0.24
2036	16.25	13.31	-2.94	—	0.26	0.02	-0.24
2037	16.36	13.32	-3.04	—	0.27	0.02	-0.25
2038	16.45	13.33	-3.12	—	0.27	0.02	-0.26
2039	16.53	13.33	-3.19	—	0.28	0.02	-0.26
2040	16.60	13.34	-3.26	—	0.28	0.02	-0.27
2041	16.67	13.35	-3.33	—	0.29	0.02	-0.27
2042	16.73	13.35	-3.38	—	0.29	0.02	-0.28
2043	16.78	13.36	-3.42	—	0.30	0.02	-0.28
2044	16.82	13.36	-3.46	—	0.30	0.02	-0.29
2045	16.86	13.36	-3.50	—	0.31	0.02	-0.29
2046	16.90	13.37	-3.53	—	0.31	0.02	-0.29
2047	16.94	13.37	-3.57	—	0.32	0.02	-0.30
2048	16.98	13.37	-3.61	—	0.32	0.02	-0.30
2049	17.03	13.38	-3.65	—	0.32	0.02	-0.30
2050	17.08	13.38	-3.69	—	0.32	0.02	-0.30
2051	17.13	13.39	-3.74	—	0.32	0.02	-0.30
2052	17.19	13.39	-3.80	—	0.32	0.02	-0.30
2053	17.25	13.40	-3.86	—	0.32	0.02	-0.30
2054	17.32	13.40	-3.92	—	0.32	0.02	-0.30
2055	17.40	13.41	-3.99	—	0.32	0.02	-0.30
2056	17.48	13.42	-4.06	—	0.32	0.02	-0.30
2057	17.56	13.42	-4.14	—	0.32	0.02	-0.30
2058	17.65	13.43	-4.22	—	0.32	0.02	-0.30
2059	17.73	13.44	-4.30	—	0.32	0.02	-0.30
2060	17.82	13.44	-4.38	—	0.32	0.02	-0.30
2061	17.90	13.45	-4.45	—	0.32	0.02	-0.30
2062	17.98	13.46	-4.52	—	0.32	0.02	-0.30
2063	18.05	13.46	-4.59	—	0.32	0.02	-0.30
2064	18.12	13.47	-4.65	—	0.33	0.02	-0.31
2065	18.18	13.47	-4.71	—	0.33	0.02	-0.31
2066	18.25	13.48	-4.77	—	0.33	0.02	-0.31
2067	18.32	13.48	-4.83	—	0.34	0.02	-0.32
2068	18.39	13.49	-4.90	—	0.34	0.02	-0.32
2069	18.46	13.50	-4.97	—	0.35	0.02	-0.32
2070	18.53	13.50	-5.03	—	0.35	0.02	-0.33
2071	18.61	13.51	-5.10	—	0.35	0.02	-0.33
2072	18.67	13.51	-5.16	—	0.36	0.02	-0.34
2073	18.74	13.52	-5.22	—	0.36	0.02	-0.34
2074	18.80	13.52	-5.28	—	0.37	0.02	-0.35
2075	18.86	13.53	-5.33	—	0.37	0.02	-0.35
2076	18.90	13.53	-5.37	—	0.38	0.02	-0.35
2077	18.94	13.53	-5.40	—	0.38	0.02	-0.35
2078	18.96	13.54	-5.43	—	0.38	0.02	-0.36
2079	18.98	13.54	-5.44	—	0.38	0.02	-0.36
2080	18.98	13.54	-5.44	—	0.38	0.02	-0.36
2081	18.97	13.54	-5.43	—	0.39	0.02	-0.36
2082	18.96	13.54	-5.42	—	0.39	0.02	-0.36
2083	18.94	13.54	-5.40	—	0.39	0.02	-0.36
2084	18.90	13.54	-5.37	—	0.39	0.02	-0.37
2085	18.86	13.53	-5.33	—	0.39	0.02	-0.37
2086	18.81	13.53	-5.28	—	0.39	0.02	-0.37
2087	18.76	13.53	-5.23	—	0.39	0.02	-0.37
2088	18.70	13.52	-5.18	—	0.40	0.03	-0.37
2089	18.64	13.52	-5.12	—	0.40	0.03	-0.37
2090	18.59	13.52	-5.07	—	0.40	0.03	-0.37
2091	18.54	13.51	-5.03	—	0.40	0.03	-0.38
2092	18.51	13.51	-4.99	—	0.40	0.03	-0.38
2093	18.48	13.51	-4.97	—	0.40	0.03	-0.38
2094	18.47	13.51	-4.96	—	0.40	0.03	-0.38
2095	18.47	13.51	-4.96	—	0.40	0.03	-0.38
2096	18.48	13.51	-4.97	—	0.40	0.03	-0.38
2097	18.50	13.51	-4.99	—	0.40	0.03	-0.38
2098	18.53	13.51	-5.01	—	0.40	0.03	-0.38
2099	18.56	13.52	-5.05	—	0.40	0.03	-0.38

Summarized Estimates: Proposal				
Year	Cost Rate	Income Rate	Actuarial Balance	Year of reserve depletion ¹
2024	17.61%	13.82%	-3.79%	2034

Summarized Estimates: Change from Current Law		
Cost Rate	Income Rate	Actuarial Balance
0.31%	0.02%	-0.30%

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