

Detailed Single Year Tables

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

Proposed Provision: F9. Apply a separate 12.4 percent tax on investment income as defined in the Affordable Care Act (ACA), with unindexed thresholds as in the ACA (\$200,000 single filer, \$250,000 for married filing joint), starting in 2024. Proceeds go to the OASDI 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	Income		Annual	Trust Fund	Cost Rate	Income		Annual	Ratio
	Cost Rate	Rate	Balance	1-1-year		Rate	Balance		
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	14.46	0.01	194	0.00	1.50	1.50	1.50	
2025	14.65	14.56	-0.09	187	-0.00	1.59	1.60	1.60	
2026	14.88	14.68	-0.20	180	-0.00	1.60	1.61	1.61	
2027	15.10	14.71	-0.39	172	-0.00	1.61	1.62	1.62	
2028	15.32	14.76	-0.56	165	-0.00	1.62	1.63	1.63	
2029	15.52	14.81	-0.71	157	-0.00	1.64	1.64	1.64	
2030	15.72	14.85	-0.87	149	-0.00	1.65	1.65	1.65	
2031	15.90	14.89	-1.01	140	-0.00	1.66	1.66	1.66	
2032	16.06	14.92	-1.14	132	-0.00	1.68	1.68	1.68	
2033	16.20	14.95	-1.26	124	-0.00	1.69	1.69	1.69	
2034	16.32	14.97	-1.35	116	-0.00	1.70	1.71	1.71	
2035	16.42	14.99	-1.43	108	-0.00	1.72	1.72	1.72	
2036	16.50	15.01	-1.48	100	-0.00	1.73	1.74	1.74	
2037	16.57	15.04	-1.54	91	-0.00	1.75	1.75	1.75	
2038	16.64	15.06	-1.58	83	-0.00	1.77	1.77	1.77	
2039	16.68	15.08	-1.60	74	-0.00	1.78	1.79	1.79	
2040	16.72	15.10	-1.61	65	-0.00	1.80	1.80	1.80	
2041	16.74	15.12	-1.62	56	-0.00	1.82	1.82	1.82	
2042	16.76	15.13	-1.63	47	-0.00	1.83	1.83	1.83	
2043	16.78	15.15	-1.63	38	-0.00	1.85	1.85	1.85	
2044	16.80	15.17	-1.63	29	-0.00	1.86	1.87	1.87	
2045	16.82	15.19	-1.63	20	-0.00	1.88	1.88	1.88	
2046	16.84	15.20	-1.63	10	-0.00	1.89	1.89	1.89	
2047	16.86	15.22	-1.64	1	-0.00	1.91	1.91	1.91	
2048	16.89	15.23	-1.65	---	-0.00	1.92	1.92	1.92	
2049	16.91	15.25	-1.66	---	-0.00	1.93	1.94	1.94	
2050	16.95	15.27	-1.68	---	-0.00	1.95	1.95	1.95	
2051	16.98	15.28	-1.69	---	-0.00	1.96	1.96	1.96	
2052	17.01	15.30	-1.71	---	-0.00	1.97	1.98	1.98	
2053	17.05	15.31	-1.74	---	-0.00	1.98	1.99	1.99	
2054	17.10	15.33	-1.77	---	-0.00	1.99	2.00	2.00	
2055	17.15	15.34	-1.80	---	-0.00	2.01	2.01	2.01	
2056	17.20	15.36	-1.84	---	-0.00	2.02	2.02	2.02	
2057	17.26	15.37	-1.89	---	-0.00	2.03	2.03	2.03	
2058	17.32	15.39	-1.93	---	-0.00	2.04	2.04	2.04	
2059	17.38	15.40	-1.98	---	-0.00	2.05	2.05	2.05	
2060	17.45	15.42	-2.03	---	-0.00	2.06	2.06	2.06	
2061	17.51	15.43	-2.08	---	-0.00	2.07	2.07	2.07	
2062	17.57	15.45	-2.12	---	-0.00	2.08	2.08	2.08	
2063	17.62	15.46	-2.16	---	-0.00	2.09	2.09	2.09	
2064	17.68	15.47	-2.20	---	-0.00	2.09	2.10	2.10	
2065	17.73	15.49	-2.24	---	-0.00	2.10	2.11	2.11	
2066	17.78	15.50	-2.28	---	-0.00	2.11	2.12	2.12	
2067	17.83	15.51	-2.32	---	-0.00	2.12	2.12	2.12	
2068	17.89	15.52	-2.36	---	-0.00	2.13	2.13	2.13	
2069	17.94	15.54	-2.41	---	-0.00	2.14	2.14	2.14	
2070	18.00	15.55	-2.45	---	-0.00	2.15	2.15	2.15	
2071	18.05	15.56	-2.49	---	-0.00	2.15	2.16	2.16	
2072	18.11	15.57	-2.53	---	-0.00	2.16	2.16	2.16	
2073	18.16	15.58	-2.58	---	-0.00	2.17	2.17	2.17	
2074	18.21	15.59	-2.61	---	-0.00	2.17	2.18	2.18	
2075	18.25	15.60	-2.65	---	-0.00	2.18	2.18	2.18	
2076	18.28	15.61	-2.67	---	-0.00	2.19	2.19	2.19	
2077	18.31	15.62	-2.68	---	-0.00	2.20	2.20	2.20	
2078	18.32	15.63	-2.69	---	-0.00	2.20	2.21	2.21	
2079	18.31	15.64	-2.67	---	-0.00	2.21	2.21	2.21	
2080	18.30	15.64	-2.65	---	-0.00	2.22	2.22	2.22	
2081	18.27	15.65	-2.62	---	-0.00	2.22	2.23	2.23	
2082	18.24	15.65	-2.59	---	-0.00	2.23	2.23	2.23	
2083	18.20	15.66	-2.54	---	-0.00	2.24	2.24	2.24	
2084	18.16	15.66	-2.49	---	-0.00	2.24	2.24	2.24	
2085	18.10	15.67	-2.44	---	-0.00	2.25	2.25	2.25	
2086	18.04	15.67	-2.38	---	-0.00	2.25	2.26	2.26	
2087	17.98	15.67	-2.31	---	-0.00	2.26	2.26	2.26	
2088	17.91	15.67	-2.24	---	-0.00	2.27	2.27	2.27	
2089	17.85	15.67	-2.18	---	-0.00	2.27	2.27	2.27	
2090	17.79	15.67	-2.11	---	-0.00	2.28	2.28	2.28	
2091	17.74	15.68	-2.06	---	-0.00	2.28	2.28	2.28	
2092	17.70	15.68	-2.02	---	-0.00	2.29	2.29	2.29	
2093	17.67	15.68	-1.99	---	-0.00	2.29	2.29	2.29	
2094	17.65	15.69	-1.96	---	-0.00	2.30	2.30	2.30	
2095	17.64	15.69	-1.95	---	-0.00	2.30	2.30	2.30	
2096	17.64	15.70	-1.94	---	-0.00	2.31	2.31	2.31	
2097	17.64	15.70	-1.94	---	-0.00	2.31	2.31	2.31	

Summarized Estimates: Proposal				
	Cost Rate	Income Rate	Actuarial Balance	Year of reserve depletion ¹
2022				
-2096	17.20%	15.70%	-1.49%	2047

Summarized Estimates: Change from Current Law			
	Cost Rate	Income Rate	Actuarial Balance
	-0.00%	1.92%	1.93%

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