

1. Individual benefit changes, 2070: Payroll Tax Increase vs. Scheduled

Population: current law beneficiaries aged 60+

Characteristic	All Beneficiaries			Affected Beneficiaries		
	Median Percent Change	Percent With		Median Percent Change	Percent With	
		Lower Benefits	Higher Benefits		Lower Benefits	Higher Benefits
Total	0%	0%	0%	...	...	...
Sex						
Female	0%	0%	0%	...	...	...
Male	0%	0%	0%	...	...	...
Ethnicity/Race						
Hispanic	0%	0%	0%	...	...	...
White	0%	0%	0%	...	...	...
Black	0%	0%	0%	...	...	...
Other	0%	0%	0%	...	...	...
Country of Birth						
U.S.	0%	0%	0%	...	...	...
Foreign	0%	0%	0%	...	...	...
Age						
60-69	0%	0%	0%	...	...	...
70-79	0%	0%	0%	...	...	...
80-89	0%	0%	0%	...	...	...
90+	0%	0%	0%	...	...	...
Marital Status						
Married	0%	0%	0%	...	...	...
Divorced	0%	0%	0%	...	...	...
Widowed	0%	0%	0%	...	...	...
Never Married	0%	0%	0%	...	...	...
Education						
Graduate	0%	0%	0%	...	...	...
Bachelor	0%	0%	0%	...	...	...
Associate	0%	0%	0%	...	...	...
High School	0%	0%	0%	...	...	...
Less than 12 Yrs	0%	0%	0%	...	...	...
Official Poverty						
Above poverty	0%	0%	0%	...	...	...
In poverty	0%	0%	0%	...	...	...
Household Income Quintile						
\$221,317+	0%	0%	0%	...	...	...
\$116,305 - \$221,317	0%	0%	0%	...	...	...
\$67,516 - \$116,305	0%	0%	0%	...	...	...
\$36,533 - \$67,516	0%	0%	0%	...	...	...
\$0-\$36,533	0%	0%	0%	...	...	...
Current Law Benefit Type						
Retired worker	0%	0%	0%	...	...	...
Widow(er)	0%	0%	0%	...	...	...
Spouse	0%	0%	0%	...	...	...
Disabled worker	0%	0%	0%	...	...	...

Source: SSA/Office of Retirement Policy, using MINT 7 Run: 03/09/2015 Ref #: SSAB0331v1 Note: ... = not applicable.

Providing these estimates does not imply SSA support for the proposal, nor is SSA responsible for any interpretations of these estimates.

2. Household income changes, 2070: Payroll Tax Increase vs. Scheduled

Population: current law beneficiaries aged 60+

Characteristic	All Beneficiaries			All Beneficiaries		
	Median Percent Change	Percent With		Median Percent Change	Percent With	
		Lower Income	Higher Income		Lower Income	Higher Income
Total	0%	0%	0%	...	...	...
Sex						
Female	0%	0%	0%	...	...	...
Male	0%	0%	0%	...	...	...
Ethnicity/Race						
Hispanic	0%	0%	0%	...	...	...
White	0%	0%	0%	...	...	...
Black	0%	0%	0%	...	...	...
Other	0%	0%	0%	...	...	...
Country of Birth						
U.S.	0%	0%	0%	...	...	...
Foreign	0%	0%	0%	...	...	...
Age						
60-69	0%	0%	0%	...	...	...
70-79	0%	0%	0%	...	...	...
80-89	0%	0%	0%	...	...	...
90+	0%	0%	0%	...	...	...
Marital Status						
Married	0%	0%	0%	...	...	...
Divorced	0%	0%	0%	...	...	...
Widowed	0%	0%	0%	...	...	...
Never Married	0%	0%	0%	...	...	...
Education						
Graduate	0%	0%	0%	...	...	...
Bachelor	0%	0%	0%	...	...	...
Associate	0%	0%	0%	...	...	...
High School	0%	0%	0%	...	...	...
Less than 12 Yrs	0%	0%	0%	...	...	...
Official Poverty						
Above poverty	0%	0%	0%	...	...	...
In poverty	0%	0%	0%	...	...	...
Household Income Quintile						
\$221,317+	0%	0%	0%	...	...	...
\$116,305 - \$221,317	0%	0%	0%	...	...	...
\$67,516 - \$116,305	0%	0%	0%	...	...	...
\$36,533 - \$67,516	0%	0%	0%	...	...	...
\$0-\$36,533	0%	0%	0%	...	...	...
Current Law Benefit Type						
Retired worker	0%	0%	0%	...	...	...
Widow(er)	0%	0%	0%	...	...	...
Spouse	0%	0%	0%	...	...	...
Disabled worker	0%	0%	0%	...	...	...

Source: SSA/Office of Retirement Policy, using MINT 7 Run: 03/09/2015 Ref #: SSAB0331v1 Note: ... = not applicable.

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3. Poverty, 2070: Payroll Tax Increase vs. Scheduled
Population: current law beneficiaries aged 60+

Characteristic	Poverty Rate			Population Change (thousands)
	Scheduled	Option	Change	
Total	2.1%	2.1%	0.0%	0
Sex				
Female	2.4%	2.4%	0.0%	0
Male	1.8%	1.8%	0.0%	0
Ethnicity/Race				
Hispanic	2.9%	2.9%	0.0%	0
White	1.4%	1.4%	0.0%	0
Black	4.2%	4.2%	0.0%	0
Other	2.3%	2.3%	0.0%	0
Country of Birth				
U.S.	1.6%	1.6%	0.0%	0
Foreign	3.9%	3.9%	0.0%	0
Age				
60-69	2.4%	2.4%	0.0%	0
70-79	2.0%	2.0%	0.0%	0
80-89	2.1%	2.1%	0.0%	0
90+	1.6%	1.6%	0.0%	0
Marital Status				
Married	0.7%	0.7%	0.0%	0
Divorced	2.6%	2.6%	0.0%	0
Widowed	1.9%	1.9%	0.0%	0
Never Married	5.3%	5.3%	0.0%	0
Education				
Graduate	0.8%	0.8%	0.0%	0
Bachelor	0.8%	0.8%	0.0%	0
Associate	1.5%	1.5%	0.0%	0
High School	2.9%	2.9%	0.0%	0
Less than 12 Yrs	5.5%	5.5%	0.0%	0
Official Poverty				
Above poverty	0.0%	0.0%	0.0%	0
In poverty	100.0%	100.0%	0.0%	0
Household Income Quintile				
\$221,317+	0.0%	0.0%	0.0%	0
\$116,305 - \$221,317	0.0%	0.0%	0.0%	0
\$67,516 - \$116,305	0.0%	0.0%	0.0%	0
\$36,533 - \$67,516	0.2%	0.2%	0.0%	0
\$0-\$36,533	10.3%	10.3%	0.0%	0
Current Law Benefit Type				
Retired worker	2.2%	2.2%	0.0%	0
Widow(er)	1.4%	1.4%	0.0%	0
Spouse	1.9%	1.9%	0.0%	0
Disabled worker	3.2%	3.2%	0.0%	0

Source: SSA/Office of Retirement Policy, using MINT 7 Run: 03/09/2015 Ref #: SSAB0331v1

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4. Beneficiary characteristics, 2070: Payroll Tax Increase vs. Scheduled
Population: current law beneficiaries aged 60+

Characteristic	All beneficiaries		Affected beneficiaries		Beneficiaries with lower benefits		Beneficiaries with higher benefits	
	Number (thousands)	Percent	Number (thousands)	Percent	Number (thousands)	Percent	Number (thousands)	Percent
Total	99,367	100.0	...	...	...	...	...	...
Sex								
Female	51,669	52.0	...	...	...	...	...	...
Male	47,698	48.0	...	...	...	...	...	...
Ethnicity/Race								
Hispanic	23,798	23.9	...	...	...	...	...	...
White	55,862	56.2	...	...	...	...	...	...
Black	10,043	10.1	...	...	...	...	...	...
Other	9,664	9.7	...	...	...	...	...	...
Country of Birth								
U.S.	77,479	78.0	...	...	...	...	...	...
Foreign	21,888	22.0	...	...	...	...	...	...
Age								
60-69	28,040	28.2	...	...	...	...	...	...
70-79	37,436	37.7	...	...	...	...	...	...
80-89	24,883	25.0	...	...	...	...	...	...
90+	9,008	9.1	...	...	...	...	...	...
Marital Status								
Married	45,743	46.0	...	...	...	...	...	...
Divorced	20,504	20.6	...	...	...	...	...	...
Widowed	15,160	15.3	...	...	...	...	...	...
Never Married	17,960	18.1	...	...	...	...	...	...
Education								
Graduate	13,734	13.8	...	...	...	...	...	...
Bachelor	22,043	22.2	...	...	...	...	...	...
Associate	21,221	21.4	...	...	...	...	...	...
High School	31,969	32.2	...	...	...	...	...	...
Less than 12 Yrs	10,400	10.5	...	...	...	...	...	...
Official Poverty								
Above poverty	97,260	97.9	...	...	...	...	...	...
In poverty	2,107	2.1	...	...	...	...	...	...
Household Income Quintile								
\$221,317+	19,874	20.0	...	...	...	...	...	...
\$116,305 - \$221,317	19,873	20.0	...	...	...	...	...	...
\$67,516 - \$116,305	19,873	20.0	...	...	...	...	...	...
\$36,533 - \$67,516	19,870	20.0	...	...	...	...	...	...
\$0-\$36,533	19,877	20.0	...	...	...	...	...	...
Current Law Benefit Type								
Retired worker	76,149	76.6	...	...	...	...	...	...
Widow(er)	13,655	13.7	...	...	...	...	...	...
Spouse	5,494	5.5	...	...	...	...	...	...
Disabled worker	4,069	4.1	...	...	...	...	...	...

Source: SSA/Office of Retirement Policy, using MINT 7 Run: 03/09/2015 Ref #: SSAB0331v1 Note: ... = not applicable.

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5. Beneficiary Status, 2070: Payroll Tax Increase vs. Scheduled (in thousands)

Population: current law or option beneficiaries aged 60+

Characteristic	Current Law Beneficiaries	Changes in beneficiary status under proposed option			Policy Option Beneficiaries
		Added	Removed	Net Change	
Total	99,367	0	0	0	99,367
Sex					
Female	51,669	0	0	0	51,669
Male	47,698	0	0	0	47,698
Ethnicity/Race					
Hispanic	23,798	0	0	0	23,798
White	55,862	0	0	0	55,862
Black	10,043	0	0	0	10,043
Other	9,664	0	0	0	9,664
Country of Birth					
U.S.	77,479	0	0	0	77,479
Foreign	21,888	0	0	0	21,888
Age					
60-69	28,040	0	0	0	28,040
70-79	37,436	0	0	0	37,436
80-89	24,883	0	0	0	24,883
90+	9,008	0	0	0	9,008
Marital Status					
Married	45,743	0	0	0	45,743
Divorced	20,504	0	0	0	20,504
Widowed	15,160	0	0	0	15,160
Never Married	17,960	0	0	0	17,960
Education					
Graduate	13,734	0	0	0	13,734
Bachelor	22,043	0	0	0	22,043
Associate	21,221	0	0	0	21,221
High School	31,969	0	0	0	31,969
Less than 12 Yrs	10,400	0	0	0	10,400
Official Poverty					
Above poverty	97,260	0	0	0	97,260
In poverty	2,107	0	0	0	2,107
Household Income Quintile					
\$221,317+	19,874	0	0	0	19,874
\$116,305 - \$221,317	19,873	0	0	0	19,873
\$67,516 - \$116,305	19,873	0	0	0	19,873
\$36,533 - \$67,516	19,870	0	0	0	19,870
\$0-\$36,533	19,877	0	0	0	19,877
Current Law Benefit Type					
Retired worker	76,149	0	0	0	76,149
Widow(er)	13,655	0	0	0	13,655
Spouse	5,494	0	0	0	5,494
Disabled worker	4,069	0	0	0	4,069

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1. Individual benefit changes, 2070: Payroll Tax Increase vs. Payable

Population: current law beneficiaries aged 60+

Characteristic	All Beneficiaries			Affected Beneficiaries		
	Median Percent Change	Percent With		Median Percent Change	Percent With	
		Lower Benefits	Higher Benefits		Lower Benefits	Higher Benefits
Total	32%	0%	100%	...	...	...
Sex						
Female	32%	0%	100%	...	...	...
Male	32%	0%	100%	...	...	...
Ethnicity/Race						
Hispanic	32%	0%	100%	...	...	...
White	32%	0%	100%	...	...	...
Black	32%	0%	100%	...	...	...
Other	32%	0%	100%	...	...	...
Country of Birth						
U.S.	32%	0%	100%	...	...	...
Foreign	32%	0%	100%	...	...	...
Age						
60-69	32%	0%	100%	...	...	...
70-79	32%	0%	100%	...	...	...
80-89	32%	0%	100%	...	...	...
90+	32%	0%	100%	...	...	...
Marital Status						
Married	32%	0%	100%	...	...	...
Divorced	32%	0%	100%	...	...	...
Widowed	32%	0%	100%	...	...	...
Never Married	32%	0%	100%	...	...	...
Education						
Graduate	32%	0%	100%	...	...	...
Bachelor	32%	0%	100%	...	...	...
Associate	32%	0%	100%	...	...	...
High School	32%	0%	100%	...	...	...
Less than 12 Yrs	32%	0%	100%	...	...	...
Official Poverty						
Above poverty	32%	0%	100%	...	...	...
In poverty	32%	0%	100%	...	...	...
Household Income Quintile						
\$221,317+	32%	0%	100%	...	...	...
\$116,305 - \$221,317	32%	0%	100%	...	...	...
\$67,516 - \$116,305	32%	0%	100%	...	...	...
\$36,533 - \$67,516	32%	0%	100%	...	...	...
\$0-\$36,533	32%	0%	100%	...	...	...
Current Law Benefit Type						
Retired worker	32%	0%	100%
Widow(er)	32%	0%	100%
Spouse	32%	0%	100%
Disabled worker	32%	0%	100%

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2. Household income changes, 2070: Payroll Tax Increase vs. Payable

Population: current law beneficiaries aged 60+

Characteristic	All Beneficiaries			Affected Beneficiaries		
	Median Percent Change	Percent With		Median Percent Change	Percent With	
		Lower Income	Higher Income		Lower Income	Higher Income
Total	12%	0%	98%	...	...	...
Sex						
Female	13%	0%	97%	...	...	...
Male	11%	0%	98%	...	...	...
Ethnicity/Race						
Hispanic	13%	0%	98%	...	...	...
White	11%	0%	98%	...	...	...
Black	15%	0%	98%	...	...	...
Other	9%	0%	96%	...	...	...
Country of Birth						
U.S.	12%	0%	98%	...	...	...
Foreign	11%	0%	96%	...	...	...
Age						
60-69	10%	0%	97%	...	...	...
70-79	12%	0%	98%	...	...	...
80-89	13%	0%	98%	...	...	...
90+	10%	0%	96%	...	...	...
Marital Status						
Married	11%	0%	98%	...	...	...
Divorced	13%	0%	98%	...	...	...
Widowed	13%	0%	97%	...	...	...
Never Married	12%	0%	97%	...	...	...
Education						
Graduate	8%	0%	97%	...	...	...
Bachelor	9%	0%	97%	...	...	...
Associate	13%	0%	99%	...	...	...
High School	14%	0%	98%	...	...	...
Less than 12 Yrs	14%	0%	97%	...	...	...
Official Poverty						
Above poverty	11%	0%	98%	...	...	...
In poverty	23%	4%	85%	...	...	...
Household Income Quintile						
\$221,317+	3%	0%	91%	...	...	...
\$116,305 - \$221,317	7%	0%	99%	...	...	...
\$67,516 - \$116,305	12%	0%	100%	...	...	...
\$36,533 - \$67,516	19%	0%	100%	...	...	...
\$0-\$36,533	27%	0%	98%	...	...	...
Current Law Benefit Type						
Retired worker	11%	0%	98%
Widow(er)	16%	0%	98%
Spouse	12%	0%	98%
Disabled worker	13%	0%	98%

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3. Poverty, 2070: Payroll Tax Increase vs. Payable
Population: current law beneficiaries aged 60+

Characteristic	Poverty Rate			Population Change (thousands)
	Payable	Option	Change	
Total	4.7%	2.1%	-2.6%	-2,534
Sex				
Female	5.3%	2.4%	-2.9%	-1,478
Male	4.0%	1.8%	-2.2%	-1,056
Ethnicity/Race				
Hispanic	6.3%	2.9%	-3.4%	-808
White	3.2%	1.4%	-1.8%	-1,006
Black	9.0%	4.2%	-4.8%	-477
Other	4.8%	2.3%	-2.5%	-242
Country of Birth				
U.S.	3.9%	1.6%	-2.3%	-1,801
Foreign	7.2%	3.9%	-3.4%	-733
Age				
60-69	4.9%	2.4%	-2.5%	-697
70-79	4.5%	2.0%	-2.5%	-918
80-89	4.9%	2.1%	-2.8%	-696
90+	4.0%	1.6%	-2.5%	-222
Marital Status				
Married	1.5%	0.7%	-0.7%	-338
Divorced	6.1%	2.6%	-3.5%	-711
Widowed	5.2%	1.9%	-3.2%	-492
Never Married	10.8%	5.3%	-5.5%	-992
Education				
Graduate	1.6%	0.8%	-0.9%	-119
Bachelor	1.7%	0.8%	-0.9%	-197
Associate	3.7%	1.5%	-2.2%	-469
High School	6.6%	2.9%	-3.7%	-1,182
Less than 12 Yrs	11.0%	5.5%	-5.4%	-565
Official Poverty				
Above poverty	2.6%	0.0%	-2.6%	-2,538
In poverty	99.8%	100.0%	0.2%	3
Household Income Quintile				
\$221,317+	0.0%	0.0%	0.0%	-4
\$116,305 - \$221,317	0.1%	0.0%	-0.1%	-10
\$67,516 - \$116,305	0.2%	0.0%	-0.1%	-25
\$36,533 - \$67,516	0.7%	0.2%	-0.5%	-106
\$0-\$36,533	22.3%	10.3%	-12.0%	-2,388
Current Law Benefit Type				
Retired worker	4.6%	2.2%	-2.4%	-1,855
Widow(er)	4.5%	1.4%	-3.0%	-414
Spouse	4.0%	1.9%	-2.1%	-116
Disabled worker	6.8%	3.2%	-3.6%	-148

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4. Beneficiary characteristics, 2070: Payroll Tax Increase vs. Payable

Population: current law beneficiaries aged 60+

Characteristic	All beneficiaries		Affected beneficiaries		Beneficiaries with lower benefits		Beneficiaries with higher benefits	
	Number (thousands)	Percent	Number (thousands)	Percent	Number (thousands)	Percent	Number (thousands)	Percent
Total	99,367	100.0	99,367	100.0	...	...	99,367	100.0
Sex								
Female	51,669	52.0	51,669	52.0	...	...	51,669	52.0
Male	47,698	48.0	47,698	48.0	...	...	47,698	48.0
Ethnicity/Race								
Hispanic	23,798	23.9	23,798	23.9	...	...	23,798	23.9
White	55,862	56.2	55,862	56.2	...	...	55,862	56.2
Black	10,043	10.1	10,043	10.1	...	...	10,043	10.1
Other	9,664	9.7	9,664	9.7	...	...	9,664	9.7
Country of Birth								
U.S.	77,479	78.0	77,479	78.0	...	...	77,479	78.0
Foreign	21,888	22.0	21,888	22.0	...	...	21,888	22.0
Age								
60-69	28,040	28.2	28,040	28.2	...	...	28,040	28.2
70-79	37,436	37.7	37,436	37.7	...	...	37,436	37.7
80-89	24,883	25.0	24,883	25.0	...	...	24,883	25.0
90+	9,008	9.1	9,008	9.1	...	...	9,008	9.1
Marital Status								
Married	45,743	46.0	45,743	46.0	...	...	45,743	46.0
Divorced	20,504	20.6	20,504	20.6	...	...	20,504	20.6
Widowed	15,160	15.3	15,160	15.3	...	...	15,160	15.3
Never Married	17,960	18.1	17,960	18.1	...	...	17,960	18.1
Education								
Graduate	13,734	13.8	13,734	13.8	...	...	13,734	13.8
Bachelor	22,043	22.2	22,043	22.2	...	...	22,043	22.2
Associate	21,221	21.4	21,221	21.4	...	...	21,221	21.4
High School	31,969	32.2	31,969	32.2	...	...	31,969	32.2
Less than 12 Yrs	10,400	10.5	10,400	10.5	...	...	10,400	10.5
Official Poverty								
Above poverty	97,260	97.9	97,260	97.9	...	...	97,260	97.9
In poverty	2,107	2.1	2,107	2.1	...	...	2,107	2.1
Household Income Quintile								
\$221,317+	19,874	20.0	19,874	20.0	...	...	19,874	20.0
\$116,305 - \$221,317	19,873	20.0	19,873	20.0	...	...	19,873	20.0
\$67,516 - \$116,305	19,873	20.0	19,873	20.0	...	...	19,873	20.0
\$36,533 - \$67,516	19,870	20.0	19,870	20.0	...	...	19,870	20.0
\$0-\$36,533	19,877	20.0	19,877	20.0	...	...	19,877	20.0
Current Law Benefit Type								
Retired worker	76,149	76.6	76,149	76.6	...	...	76,149	76.6
Widow(er)	13,655	13.7	13,655	13.7	13,655	13.7
Spouse	5,494	5.5	5,494	5.5	5,494	5.5
Disabled worker	4,069	4.1	4,069	4.1	4,069	4.1

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5. Beneficiary Status, 2070: Payroll Tax Increase vs. Payable (in thousands)

Population: current law or option beneficiaries aged 60+

Characteristic	Current Law Beneficiaries	Changes in beneficiary status under proposed option			Policy Option Beneficiaries
		Added	Removed	Net Change	
Total	99,367	0	0	0	99,367
Sex					
Female	51,669	0	0	0	51,669
Male	47,698	0	0	0	47,698
Ethnicity/Race					
Hispanic	23,798	0	0	0	23,798
White	55,862	0	0	0	55,862
Black	10,043	0	0	0	10,043
Other	9,664	0	0	0	9,664
Country of Birth					
U.S.	77,479	0	0	0	77,479
Foreign	21,888	0	0	0	21,888
Age					
60-69	28,040	0	0	0	28,040
70-79	37,436	0	0	0	37,436
80-89	24,883	0	0	0	24,883
90+	9,008	0	0	0	9,008
Marital Status					
Married	45,743	0	0	0	45,743
Divorced	20,504	0	0	0	20,504
Widowed	15,160	0	0	0	15,160
Never Married	17,960	0	0	0	17,960
Education					
Graduate	13,734	0	0	0	13,734
Bachelor	22,043	0	0	0	22,043
Associate	21,221	0	0	0	21,221
High School	31,969	0	0	0	31,969
Less than 12 Yrs	10,400	0	0	0	10,400
Official Poverty					
Above poverty	97,260	0	0	0	97,260
In poverty	2,107	0	0	0	2,107
Household Income Quintile					
\$221,317+	19,874	0	0	0	19,874
\$116,305 - \$221,317	19,873	0	0	0	19,873
\$67,516 - \$116,305	19,873	0	0	0	19,873
\$36,533 - \$67,516	19,870	0	0	0	19,870
\$0-\$36,533	19,877	0	0	0	19,877
Current Law Benefit Type					
Retired worker	76,149	0	0	0	76,149
Widow(er)	13,655	0	0	0	13,655
Spouse	5,494	0	0	0	5,494
Disabled worker	4,069	0	0	0	4,069

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