

1. Individual benefit changes, 2050: Tax Health Insurance Premiums 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 | 1% | 2% | 52% | 3% | 4% | 96% |
| Sex | | | | | | |
| Female | 1% | 2% | 51% | 3% | 3% | 97% |
| Male | 1% | 2% | 54% | 3% | 4% | 96% |
| Ethnicity/Race | | | | | | |
| Hispanic | 1% | 2% | 55% | 4% | 3% | 97% |
| White | 1% | 2% | 51% | 3% | 4% | 96% |
| Black | 1% | 1% | 57% | 4% | 2% | 98% |
| Other | 1% | 2% | 53% | 3% | 4% | 96% |
| Country of Birth | | | | | | |
| U.S. | 1% | 2% | 52% | 3% | 4% | 96% |
| Foreign | 1% | 2% | 54% | 4% | 3% | 97% |
| Age | | | | | | |
| 60-69 | 2% | 6% | 61% | 4% | 9% | 91% |
| 70-79 | 1% | 0% | 59% | 3% | 0% | 100% |
| 80-89 | 0% | 0% | 45% | 2% | 0% | 100% |
| 90+ | 0% | 0% | 16% | 2% | 0% | 100% |
| Marital Status | | | | | | |
| Married | 1% | 2% | 57% | 3% | 4% | 96% |
| Divorced | 1% | 2% | 51% | 3% | 3% | 97% |
| Widowed | 0% | 0% | 41% | 3% | 1% | 99% |
| Never Married | 1% | 2% | 51% | 3% | 4% | 96% |
| Education | | | | | | |
| Graduate | 0% | 2% | 47% | 2% | 5% | 95% |
| Bachelor | 1% | 2% | 51% | 3% | 4% | 96% |
| Associate | 1% | 2% | 55% | 3% | 3% | 97% |
| High School | 1% | 2% | 54% | 4% | 3% | 97% |
| Less than 12 Yrs | 1% | 2% | 51% | 4% | 3% | 97% |
| Official Poverty | | | | | | |
| Above poverty | 1% | 2% | 53% | 3% | 4% | 96% |
| In poverty | 0% | 0% | 43% | 5% | 1% | 99% |
| Household Income Quintile | | | | | | |
| \$200,444+ | 0% | 3% | 46% | 2% | 6% | 94% |
| \$103,985 - \$200,444 | 1% | 3% | 56% | 3% | 6% | 94% |
| \$60,527 - \$103,985 | 1% | 2% | 58% | 3% | 4% | 96% |
| \$33,157 - \$60,527 | 1% | 1% | 54% | 4% | 2% | 98% |
| \$0-\$33,157 | 0% | 0% | 47% | 4% | 0% | 100% |
| Current Law Benefit Type | | | | | | |
| Retired worker | 1% | 2% | 55% | 3% | 4% | 96% |
| Widow(er) | 0% | 1% | 34% | 3% | 2% | 98% |
| Spouse | 1% | 3% | 57% | 3% | 5% | 95% |
| Disabled worker | 2% | 0% | 60% | 5% | 0% | 100% |

Source: SSA/Office of Retirement Policy, using MINT 7 Run: 10/30/2015 Ref #: RD0617v1

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, 2050: Tax Health Insurance Premiums vs. Scheduled

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 | 0% | 2% | 35% | 1% | 3% | 56% |
| Sex | | | | | | |
| Female | 0% | 2% | 35% | 1% | 3% | 59% |
| Male | 0% | 3% | 35% | 1% | 4% | 54% |
| Ethnicity/Race | | | | | | |
| Hispanic | 0% | 3% | 42% | 1% | 3% | 64% |
| White | 0% | 2% | 32% | 1% | 4% | 52% |
| Black | 0% | 2% | 43% | 1% | 2% | 67% |
| Other | 0% | 2% | 32% | 1% | 4% | 53% |
| Country of Birth | | | | | | |
| U.S. | 0% | 2% | 34% | 1% | 4% | 55% |
| Foreign | 0% | 2% | 38% | 1% | 3% | 61% |
| Age | | | | | | |
| 60-69 | 0% | 7% | 41% | 1% | 9% | 56% |
| 70-79 | 0% | 1% | 40% | 1% | 0% | 60% |
| 80-89 | 0% | 0% | 28% | 1% | 0% | 53% |
| 90+ | 0% | 0% | 8% | 0% | 0% | 37% |
| Marital Status | | | | | | |
| Married | 0% | 3% | 40% | 1% | 4% | 55% |
| Divorced | 0% | 2% | 31% | 1% | 3% | 59% |
| Widowed | 0% | 0% | 25% | 1% | 1% | 60% |
| Never Married | 0% | 2% | 30% | 1% | 4% | 56% |
| Education | | | | | | |
| Graduate | 0% | 2% | 20% | 0% | 4% | 37% |
| Bachelor | 0% | 2% | 28% | 0% | 3% | 46% |
| Associate | 0% | 3% | 38% | 1% | 3% | 60% |
| High School | 0% | 2% | 40% | 1% | 3% | 64% |
| Less than 12 Yrs | 0% | 2% | 40% | 1% | 3% | 69% |
| Official Poverty | | | | | | |
| Above poverty | 0% | 2% | 35% | 1% | 3% | 56% |
| In poverty | 0% | 1% | 37% | 3% | 1% | 84% |
| Household Income Quintile | | | | | | |
| \$200,444+ | 0% | 2% | 4% | 0% | 4% | 7% |
| \$103,985 - \$200,444 | 0% | 4% | 27% | 0% | 6% | 37% |
| \$60,527 - \$103,985 | 0% | 3% | 46% | 1% | 4% | 65% |
| \$33,157 - \$60,527 | 1% | 2% | 52% | 2% | 2% | 81% |
| \$0-\$33,157 | 0% | 1% | 45% | 3% | 1% | 91% |
| Current Law Benefit Type | | | | | | |
| Retired worker | 0% | 3% | 36% | 1% | 4% | 54% |
| Widow(er) | 0% | 1% | 22% | 1% | 2% | 63% |
| Spouse | 0% | 2% | 37% | 1% | 3% | 59% |
| Disabled worker | 0% | 3% | 48% | 2% | 2% | 74% |

Source: SSA/Office of Retirement Policy, using MINT 7 Run: 10/30/2015 Ref #: RD0617v1

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**3. Poverty, 2050: Tax Health Insurance Premiums vs. Scheduled
Population: current law beneficiaries aged 60+**

| Characteristic | Poverty Rate | | | Population Change (thousands) |
|----------------------------------|--------------|--------|--------|----------------------------------|
| | Scheduled | Option | Change | |
| Total | 3.5% | 3.3% | -0.2% | -191 |
| Sex | | | | |
| Female | 4.2% | 3.9% | -0.3% | -126 |
| Male | 2.7% | 2.5% | -0.2% | -64 |
| Ethnicity/Race | | | | |
| Hispanic | 5.0% | 4.6% | -0.4% | -58 |
| White | 2.4% | 2.3% | -0.1% | -73 |
| Black | 6.7% | 6.2% | -0.4% | -42 |
| Other | 4.1% | 3.9% | -0.2% | -17 |
| Country of Birth | | | | |
| U.S. | 2.8% | 2.7% | -0.1% | -94 |
| Foreign | 5.9% | 5.4% | -0.5% | -97 |
| Age | | | | |
| 60-69 | 4.4% | 4.0% | -0.4% | -106 |
| 70-79 | 3.1% | 3.0% | -0.2% | -52 |
| 80-89 | 3.2% | 3.0% | -0.1% | -30 |
| 90+ | 2.9% | 2.9% | 0.0% | -1 |
| Marital Status | | | | |
| Married | 1.3% | 1.1% | -0.1% | -48 |
| Divorced | 5.2% | 4.8% | -0.4% | -67 |
| Widowed | 3.9% | 3.6% | -0.3% | -42 |
| Never Married | 9.6% | 9.3% | -0.3% | -32 |
| Education | | | | |
| Graduate | 1.3% | 1.2% | -0.2% | -17 |
| Bachelor | 1.4% | 1.3% | -0.1% | -16 |
| Associate | 2.6% | 2.3% | -0.2% | -48 |
| High School | 5.0% | 4.7% | -0.2% | -65 |
| Less than 12 Yrs | 8.8% | 8.2% | -0.5% | -43 |
| Official Poverty | | | | |
| Above poverty | 0.0% | 0.0% | 0.0% | 0 |
| In poverty | 100.0% | 93.7% | -6.3% | -191 |
| Household Income Quintile | | | | |
| \$200,444+ | 0.1% | 0.1% | 0.0% | -2 |
| \$103,985 - \$200,444 | 0.1% | 0.1% | 0.0% | 0 |
| \$60,527 - \$103,985 | 0.2% | 0.2% | 0.0% | -1 |
| \$33,157 - \$60,527 | 0.4% | 0.3% | 0.0% | -7 |
| \$0-\$33,157 | 16.7% | 15.7% | -1.0% | -179 |
| Current Law Benefit Type | | | | |
| Retired worker | 3.5% | 3.3% | -0.2% | -121 |
| Widow(er) | 3.1% | 2.9% | -0.2% | -23 |
| Spouse | 3.3% | 2.9% | -0.4% | -22 |
| Disabled worker | 5.5% | 4.9% | -0.6% | -23 |

Source: SSA/Office of Retirement Policy, using MINT 7 Run: 10/30/2015 Ref #: RD0617v1

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**4. Beneficiary characteristics, 2050: Tax Health Insurance Premiums 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 | 87,563 | 100.0 | 47,561 | 100.0 | 1,724 | 100.0 | 45,837 | 100.0 |
| Sex | | | | | | | | |
| Female | 46,454 | 53.1 | 24,647 | 51.8 | 827 | 47.9 | 23,820 | 52.0 |
| Male | 41,108 | 46.9 | 22,914 | 48.2 | 897 | 52.1 | 22,017 | 48.0 |
| Ethnicity/Race | | | | | | | | |
| Hispanic | 16,087 | 18.4 | 9,208 | 19.4 | 301 | 17.5 | 8,907 | 19.4 |
| White | 54,725 | 62.5 | 28,814 | 60.6 | 1,141 | 66.2 | 27,673 | 60.4 |
| Black | 9,521 | 10.9 | 5,568 | 11.7 | 126 | 7.3 | 5,442 | 11.9 |
| Other | 7,231 | 8.3 | 3,971 | 8.3 | 156 | 9.0 | 3,815 | 8.3 |
| Country of Birth | | | | | | | | |
| U.S. | 67,665 | 77.3 | 36,571 | 76.9 | 1,384 | 80.3 | 35,187 | 76.8 |
| Foreign | 19,898 | 22.7 | 10,990 | 23.1 | 340 | 19.7 | 10,650 | 23.2 |
| Age | | | | | | | | |
| 60-69 | 25,830 | 29.5 | 17,387 | 36.6 | 1,645 | 95.4 | 15,742 | 34.3 |
| 70-79 | 32,047 | 36.6 | 19,118 | 40.2 | 64 | 3.7 | 19,054 | 41.6 |
| 80-89 | 21,891 | 25.0 | 9,831 | 20.7 | 13 | 0.7 | 9,818 | 21.4 |
| 90+ | 7,795 | 8.9 | 1,225 | 2.6 | 3 | 0.2 | 1,223 | 2.7 |
| Marital Status | | | | | | | | |
| Married | 44,755 | 51.1 | 26,685 | 56.1 | 1,108 | 64.3 | 25,577 | 55.8 |
| Divorced | 16,656 | 19.0 | 8,785 | 18.5 | 298 | 17.3 | 8,487 | 18.5 |
| Widowed | 15,365 | 17.5 | 6,388 | 13.4 | 72 | 4.2 | 6,316 | 13.8 |
| Never Married | 10,786 | 12.3 | 5,703 | 12.0 | 246 | 14.3 | 5,457 | 11.9 |
| Education | | | | | | | | |
| Graduate | 11,012 | 12.6 | 5,431 | 11.4 | 256 | 14.8 | 5,176 | 11.3 |
| Bachelor | 20,209 | 23.1 | 10,710 | 22.5 | 437 | 25.4 | 10,273 | 22.4 |
| Associate | 19,742 | 22.5 | 11,294 | 23.7 | 381 | 22.1 | 10,913 | 23.8 |
| High School | 28,574 | 32.6 | 15,939 | 33.5 | 522 | 30.3 | 15,417 | 33.6 |
| Less than 12 Yrs | 8,026 | 9.2 | 4,187 | 8.8 | 128 | 7.4 | 4,058 | 8.9 |
| Official Poverty | | | | | | | | |
| Above poverty | 84,498 | 96.5 | 46,229 | 97.2 | 1,717 | 99.6 | 44,511 | 97.1 |
| In poverty | 3,064 | 3.5 | 1,333 | 2.8 | 7 | 0.4 | 1,325 | 2.9 |
| Household Income Quintile | | | | | | | | |
| \$200,444+ | 17,512 | 20.0 | 8,579 | 18.0 | 531 | 30.8 | 8,048 | 17.6 |
| \$103,985 - \$200,444 | 17,512 | 20.0 | 10,343 | 21.7 | 569 | 33.0 | 9,774 | 21.3 |
| \$60,527 - \$103,985 | 17,514 | 20.0 | 10,636 | 22.4 | 401 | 23.3 | 10,235 | 22.3 |
| \$33,157 - \$60,527 | 17,511 | 20.0 | 9,719 | 20.4 | 188 | 10.9 | 9,532 | 20.8 |
| \$0-\$33,157 | 17,513 | 20.0 | 8,284 | 17.4 | 35 | 2.1 | 8,248 | 18.0 |
| Current Law Benefit Type | | | | | | | | |
| Retired worker | 65,687 | 75.0 | 37,606 | 79.1 | 1,490 | 86.4 | 36,117 | 78.8 |
| Widow(er) | 12,506 | 14.3 | 4,380 | 9.2 | 82 | 4.8 | 4,297 | 9.4 |
| Spouse | 5,677 | 6.5 | 3,368 | 7.1 | 152 | 8.8 | 3,216 | 7.0 |
| Disabled worker | 3,693 | 4.2 | 2,207 | 4.6 | ... | ... | 2,207 | 4.8 |

Source: SSA/Office of Retirement Policy, using MINT 7 Run: 10/30/2015 Ref #: RD0617v1 Note: ... = not applicable.

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5. Beneficiary Status, 2050: Tax Health Insurance Premiums 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 | 87,563 | +87 | -121 | -34 | 87,528 |
| Sex | | | | | |
| Female | 46,454 | +49 | -69 | -20 | 46,434 |
| Male | 41,108 | +38 | -53 | -14 | 41,094 |
| Ethnicity/Race | | | | | |
| Hispanic | 16,087 | +24 | -27 | -3 | 16,083 |
| White | 54,725 | +19 | -64 | -44 | 54,680 |
| Black | 9,521 | +21 | -3 | +17 | 9,538 |
| Other | 7,231 | +23 | -27 | -3 | 7,227 |
| Country of Birth | | | | | |
| U.S. | 67,665 | +21 | -94 | -73 | 67,592 |
| Foreign | 19,898 | +66 | -27 | +38 | 19,936 |
| Age | | | | | |
| 60-69 | 25,830 | +34 | -121 | -87 | 25,742 |
| 70-79 | 32,047 | +42 | 0 | +42 | 32,089 |
| 80-89 | 21,891 | +9 | 0 | +9 | 21,900 |
| 90+ | 7,795 | +2 | 0 | +1 | 7,796 |
| Marital Status | | | | | |
| Married | 44,755 | +41 | -85 | -43 | 44,711 |
| Divorced | 16,656 | +8 | -16 | -7 | 16,648 |
| Widowed | 15,365 | +19 | -8 | +10 | 15,376 |
| Never Married | 10,786 | +19 | -13 | +6 | 10,793 |
| Education | | | | | |
| Graduate | 11,012 | +3 | -23 | -20 | 10,992 |
| Bachelor | 20,209 | +14 | -30 | -16 | 20,193 |
| Associate | 19,742 | +18 | -25 | -7 | 19,734 |
| High School | 28,574 | +35 | -34 | 0 | 28,575 |
| Less than 12 Yrs | 8,026 | +17 | -8 | +8 | 8,035 |
| Official Poverty | | | | | |
| Above poverty | 84,498 | +42 | -121 | -79 | 84,418 |
| In poverty | 3,064 | +45 | 0 | +45 | 3,109 |
| Household Income Quintile | | | | | |
| \$200,444+ | 17,512 | +3 | -40 | -37 | 17,474 |
| \$103,985 - \$200,444 | 17,512 | +7 | -52 | -44 | 17,467 |
| \$60,527 - \$103,985 | 17,514 | +11 | -23 | -11 | 17,503 |
| \$33,157 - \$60,527 | 17,511 | +8 | -6 | +1 | 17,513 |
| \$0-\$33,157 | 17,513 | +58 | +1 | +56 | 17,570 |
| Current Law Benefit Type | | | | | |
| Retired worker | 65,687 | 0 | -108 | -108 | 65,578 |
| Widow(er) | 12,506 | 0 | -3 | -2 | 12,503 |
| Spouse | 5,677 | 0 | -11 | -10 | 5,667 |
| Disabled worker | 3,693 | 0 | 0 | 0 | 3,693 |
| None | 0 | +87 | 0 | +86 | 87 |

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1. Individual benefit changes, 2050: Tax Health Insurance Premiums 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% | 1% | 99% | 35% | 1% | 99% |
| Sex | | | | | | |
| Female | 32% | 1% | 99% | 35% | 1% | 99% |
| Male | 32% | 1% | 99% | 35% | 1% | 99% |
| Ethnicity/Race | | | | | | |
| Hispanic | 32% | 1% | 99% | 36% | 1% | 99% |
| White | 32% | 1% | 99% | 35% | 1% | 99% |
| Black | 32% | 0% | 100% | 36% | 0% | 100% |
| Other | 32% | 1% | 99% | 35% | 2% | 98% |
| Country of Birth | | | | | | |
| U.S. | 32% | 1% | 99% | 35% | 1% | 99% |
| Foreign | 32% | 1% | 99% | 36% | 1% | 99% |
| Age | | | | | | |
| 60-69 | 33% | 2% | 98% | 36% | 3% | 96% |
| 70-79 | 32% | 0% | 100% | 35% | 0% | 100% |
| 80-89 | 31% | 0% | 100% | 34% | 0% | 100% |
| 90+ | 30% | 0% | 100% | 33% | 0% | 100% |
| Marital Status | | | | | | |
| Married | 32% | 1% | 99% | 35% | 2% | 98% |
| Divorced | 32% | 0% | 100% | 34% | 1% | 99% |
| Widowed | 31% | 0% | 100% | 35% | 0% | 100% |
| Never Married | 32% | 0% | 100% | 34% | 1% | 99% |
| Education | | | | | | |
| Graduate | 31% | 1% | 99% | 34% | 2% | 98% |
| Bachelor | 32% | 1% | 99% | 34% | 2% | 98% |
| Associate | 32% | 1% | 99% | 35% | 1% | 99% |
| High School | 32% | 1% | 99% | 36% | 1% | 99% |
| Less than 12 Yrs | 32% | 0% | 100% | 37% | 1% | 99% |
| Official Poverty | | | | | | |
| Above poverty | 32% | 1% | 99% | 35% | 1% | 99% |
| In poverty | 30% | 0% | 100% | 37% | 0% | 100% |
| Household Income Quintile | | | | | | |
| \$200,444+ | 31% | 1% | 99% | 34% | 2% | 97% |
| \$103,985 - \$200,444 | 32% | 1% | 99% | 35% | 2% | 98% |
| \$60,527 - \$103,985 | 32% | 1% | 99% | 35% | 1% | 99% |
| \$33,157 - \$60,527 | 32% | 0% | 100% | 35% | 0% | 100% |
| \$0-\$33,157 | 31% | 0% | 100% | 36% | 0% | 100% |
| Current Law Benefit Type | | | | | | |
| Retired worker | 32% | 1% | 99% | 35% | 1% | 98% |
| Widow(er) | 30% | 0% | 100% | 34% | 0% | 100% |
| Spouse | 32% | 0% | 99% | 34% | 1% | 99% |
| Disabled worker | 33% | 0% | 100% | 38% | 0% | 100% |

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2. Household income changes, 2050: Tax Health Insurance Premiums 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 | 11% | 0% | 96% | 12% | 1% | 97% |
| Sex | | | | | | |
| Female | 12% | 0% | 96% | 12% | 1% | 97% |
| Male | 10% | 1% | 96% | 11% | 1% | 96% |
| Ethnicity/Race | | | | | | |
| Hispanic | 13% | 1% | 96% | 13% | 1% | 97% |
| White | 10% | 0% | 96% | 11% | 1% | 97% |
| Black | 15% | 1% | 97% | 15% | 1% | 97% |
| Other | 9% | 1% | 94% | 9% | 1% | 95% |
| Country of Birth | | | | | | |
| U.S. | 11% | 0% | 96% | 11% | 1% | 97% |
| Foreign | 11% | 0% | 95% | 12% | 1% | 96% |
| Age | | | | | | |
| 60-69 | 10% | 1% | 93% | 10% | 2% | 94% |
| 70-79 | 12% | 0% | 98% | 13% | 0% | 98% |
| 80-89 | 12% | 0% | 97% | 12% | 0% | 98% |
| 90+ | 8% | 0% | 94% | 9% | 0% | 97% |
| Marital Status | | | | | | |
| Married | 10% | 0% | 96% | 11% | 1% | 97% |
| Divorced | 12% | 0% | 97% | 13% | 1% | 97% |
| Widowed | 12% | 0% | 96% | 13% | 0% | 97% |
| Never Married | 12% | 1% | 95% | 12% | 1% | 96% |
| Education | | | | | | |
| Graduate | 7% | 0% | 94% | 8% | 1% | 95% |
| Bachelor | 8% | 0% | 96% | 9% | 1% | 96% |
| Associate | 12% | 0% | 97% | 13% | 0% | 98% |
| High School | 14% | 1% | 96% | 14% | 1% | 97% |
| Less than 12 Yrs | 15% | 1% | 95% | 16% | 1% | 96% |
| Official Poverty | | | | | | |
| Above poverty | 11% | 0% | 96% | 11% | 1% | 97% |
| In poverty | 23% | 5% | 85% | 27% | 5% | 88% |
| Household Income Quintile | | | | | | |
| \$200,444+ | 3% | 0% | 87% | 3% | 1% | 89% |
| \$103,985 - \$200,444 | 7% | 1% | 98% | 7% | 1% | 97% |
| \$60,527 - \$103,985 | 12% | 0% | 99% | 13% | 1% | 99% |
| \$33,157 - \$60,527 | 19% | 0% | 100% | 21% | 0% | 99% |
| \$0-\$33,157 | 27% | 1% | 97% | 30% | 1% | 98% |
| Current Law Benefit Type | | | | | | |
| Retired worker | 10% | 1% | 96% | 11% | 1% | 96% |
| Widow(er) | 14% | 0% | 97% | 16% | 0% | 98% |
| Spouse | 11% | 0% | 96% | 13% | 1% | 97% |
| Disabled worker | 16% | 1% | 97% | 16% | 0% | 99% |

Source: SSA/Office of Retirement Policy, using MINT 7 Run: 10/30/2015 Ref #: RD0617v1

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3. Poverty, 2050: Tax Health Insurance Premiums vs. Payable
Population: current law beneficiaries aged 60+

| Characteristic | Poverty Rate | | | Population Change (thousands) |
|----------------------------------|--------------|--------|--------|----------------------------------|
| | Payable | Option | Change | |
| Total | 7.0% | 3.3% | -3.7% | -3,241 |
| Sex | | | | |
| Female | 8.2% | 3.9% | -4.3% | -1,977 |
| Male | 5.6% | 2.5% | -3.1% | -1,264 |
| Ethnicity/Race | | | | |
| Hispanic | 9.4% | 4.6% | -4.8% | -767 |
| White | 5.2% | 2.3% | -2.9% | -1,565 |
| Black | 13.0% | 6.2% | -6.8% | -649 |
| Other | 7.4% | 3.9% | -3.6% | -259 |
| Country of Birth | | | | |
| U.S. | 6.1% | 2.7% | -3.5% | -2,356 |
| Foreign | 9.9% | 5.4% | -4.4% | -885 |
| Age | | | | |
| 60-69 | 8.1% | 4.0% | -4.1% | -1,052 |
| 70-79 | 6.6% | 3.0% | -3.6% | -1,166 |
| 80-89 | 6.6% | 3.0% | -3.6% | -782 |
| 90+ | 6.0% | 2.9% | -3.1% | -239 |
| Marital Status | | | | |
| Married | 2.3% | 1.1% | -1.2% | -536 |
| Divorced | 11.0% | 4.8% | -6.3% | -1,042 |
| Widowed | 8.6% | 3.6% | -5.0% | -769 |
| Never Married | 17.6% | 9.3% | -8.3% | -891 |
| Education | | | | |
| Graduate | 2.2% | 1.2% | -1.1% | -119 |
| Bachelor | 2.9% | 1.3% | -1.6% | -317 |
| Associate | 5.9% | 2.3% | -3.6% | -709 |
| High School | 9.8% | 4.7% | -5.1% | -1,457 |
| Less than 12 Yrs | 16.2% | 8.2% | -7.9% | -637 |
| Official Poverty | | | | |
| Above poverty | 3.6% | 0.0% | -3.6% | -3,049 |
| In poverty | 100.0% | 93.7% | -6.3% | -191 |
| Household Income Quintile | | | | |
| \$200,444+ | 0.2% | 0.1% | -0.1% | -10 |
| \$103,985 - \$200,444 | 0.2% | 0.1% | -0.1% | -14 |
| \$60,527 - \$103,985 | 0.5% | 0.2% | -0.3% | -52 |
| \$33,157 - \$60,527 | 1.2% | 0.3% | -0.9% | -157 |
| \$0-\$33,157 | 32.8% | 15.7% | -17.2% | -3,004 |
| Current Law Benefit Type | | | | |
| Retired worker | 6.5% | 3.3% | -3.2% | -2,118 |
| Widow(er) | 8.1% | 2.9% | -5.2% | -653 |
| Spouse | 6.9% | 2.9% | -4.0% | -227 |
| Disabled worker | 11.5% | 4.9% | -6.6% | -241 |

Source: SSA/Office of Retirement Policy, using MINT 7 Run: 10/30/2015 Ref #: RD0617v1

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

4. Beneficiary characteristics, 2050: Tax Health Insurance Premiums 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 | 87,563 | 100.0 | 87,507 | 100.0 | 559 | 100.0 | 86,948 | 100.0 |
| Sex | | | | | | | | |
| Female | 46,454 | 53.1 | 46,426 | 53.1 | 268 | 48.0 | 46,157 | 53.1 |
| Male | 41,108 | 46.9 | 41,081 | 46.9 | 291 | 52.0 | 40,790 | 46.9 |
| Ethnicity/Race | | | | | | | | |
| Hispanic | 16,087 | 18.4 | 16,079 | 18.4 | 97 | 17.3 | 15,982 | 18.4 |
| White | 54,725 | 62.5 | 54,691 | 62.5 | 371 | 66.3 | 54,320 | 62.5 |
| Black | 9,521 | 10.9 | 9,518 | 10.9 | 23 | 4.1 | 9,495 | 10.9 |
| Other | 7,231 | 8.3 | 7,219 | 8.3 | 69 | 12.3 | 7,151 | 8.2 |
| Country of Birth | | | | | | | | |
| U.S. | 67,665 | 77.3 | 67,618 | 77.3 | 432 | 77.3 | 67,186 | 77.3 |
| Foreign | 19,898 | 22.7 | 19,889 | 22.7 | 127 | 22.7 | 19,762 | 22.7 |
| Age | | | | | | | | |
| 60-69 | 25,830 | 29.5 | 25,774 | 29.5 | 559 | 100.0 | 25,215 | 29.0 |
| 70-79 | 32,047 | 36.6 | 32,047 | 36.6 | ... | ... | 32,047 | 36.9 |
| 80-89 | 21,891 | 25.0 | 21,891 | 25.0 | ... | ... | 21,891 | 25.2 |
| 90+ | 7,795 | 8.9 | 7,795 | 8.9 | ... | ... | 7,795 | 9.0 |
| Marital Status | | | | | | | | |
| Married | 44,755 | 51.1 | 44,711 | 51.1 | 429 | 76.7 | 44,283 | 50.9 |
| Divorced | 16,656 | 19.0 | 16,650 | 19.0 | 69 | 12.3 | 16,581 | 19.1 |
| Widowed | 15,365 | 17.5 | 15,363 | 17.6 | 17 | 3.0 | 15,346 | 17.6 |
| Never Married | 10,786 | 12.3 | 10,783 | 12.3 | 45 | 8.0 | 10,738 | 12.3 |
| Education | | | | | | | | |
| Graduate | 11,012 | 12.6 | 11,000 | 12.6 | 94 | 16.8 | 10,907 | 12.5 |
| Bachelor | 20,209 | 23.1 | 20,184 | 23.1 | 165 | 29.6 | 20,018 | 23.0 |
| Associate | 19,742 | 22.5 | 19,734 | 22.6 | 105 | 18.9 | 19,629 | 22.6 |
| High School | 28,574 | 32.6 | 28,565 | 32.6 | 159 | 28.4 | 28,406 | 32.7 |
| Less than 12 Yrs | 8,026 | 9.2 | 8,023 | 9.2 | 36 | 6.4 | 7,987 | 9.2 |
| Official Poverty | | | | | | | | |
| Above poverty | 84,498 | 96.5 | 84,442 | 96.5 | 559 | 100.0 | 83,883 | 96.5 |
| In poverty | 3,064 | 3.5 | 3,064 | 3.5 | ... | ... | 3,064 | 3.5 |
| Household Income Quintile | | | | | | | | |
| \$200,444+ | 17,512 | 20.0 | 17,490 | 20.0 | 213 | 38.1 | 17,277 | 19.9 |
| \$103,985 - \$200,444 | 17,512 | 20.0 | 17,493 | 20.0 | 202 | 36.1 | 17,291 | 19.9 |
| \$60,527 - \$103,985 | 17,514 | 20.0 | 17,499 | 20.0 | 107 | 19.1 | 17,392 | 20.0 |
| \$33,157 - \$60,527 | 17,511 | 20.0 | 17,511 | 20.0 | 36 | 6.5 | 17,475 | 20.1 |
| \$0-\$33,157 | 17,513 | 20.0 | 17,513 | 20.0 | 1 | 0.1 | 17,513 | 20.1 |
| Current Law Benefit Type | | | | | | | | |
| Retired worker | 65,687 | 75.0 | 65,642 | 75.0 | 529 | 94.6 | 65,113 | 74.9 |
| Widow(er) | 12,506 | 14.3 | 12,503 | 14.3 | 8 | 1.4 | 12,495 | 14.4 |
| Spouse | 5,677 | 6.5 | 5,669 | 6.5 | 22 | 4.0 | 5,647 | 6.5 |
| Disabled worker | 3,693 | 4.2 | 3,693 | 4.2 | ... | ... | 3,693 | 4.2 |

Source: SSA/Office of Retirement Policy, using MINT 7 Run: 10/30/2015 Ref #: RD0617v1 Note: ... = not applicable.

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

5. Beneficiary Status, 2050: Tax Health Insurance Premiums 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 | 87,563 | +87 | -121 | -34 | 87,528 |
| Sex | | | | | |
| Female | 46,454 | +49 | -69 | -20 | 46,434 |
| Male | 41,108 | +38 | -53 | -14 | 41,094 |
| Ethnicity/Race | | | | | |
| Hispanic | 16,087 | +24 | -27 | -3 | 16,083 |
| White | 54,725 | +19 | -64 | -44 | 54,680 |
| Black | 9,521 | +21 | -3 | +17 | 9,538 |
| Other | 7,231 | +23 | -27 | -3 | 7,227 |
| Country of Birth | | | | | |
| U.S. | 67,665 | +21 | -94 | -73 | 67,592 |
| Foreign | 19,898 | +66 | -27 | +38 | 19,936 |
| Age | | | | | |
| 60-69 | 25,830 | +34 | -121 | -87 | 25,742 |
| 70-79 | 32,047 | +42 | 0 | +42 | 32,089 |
| 80-89 | 21,891 | +9 | 0 | +9 | 21,900 |
| 90+ | 7,795 | +2 | 0 | +1 | 7,796 |
| Marital Status | | | | | |
| Married | 44,755 | +41 | -85 | -43 | 44,711 |
| Divorced | 16,656 | +8 | -16 | -7 | 16,648 |
| Widowed | 15,365 | +19 | -8 | +10 | 15,376 |
| Never Married | 10,786 | +19 | -13 | +6 | 10,793 |
| Education | | | | | |
| Graduate | 11,012 | +3 | -23 | -20 | 10,992 |
| Bachelor | 20,209 | +14 | -30 | -16 | 20,193 |
| Associate | 19,742 | +18 | -25 | -7 | 19,734 |
| High School | 28,574 | +35 | -34 | 0 | 28,575 |
| Less than 12 Yrs | 8,026 | +17 | -8 | +8 | 8,035 |
| Official Poverty | | | | | |
| Above poverty | 84,498 | +42 | -121 | -79 | 84,418 |
| In poverty | 3,064 | +45 | 0 | +45 | 3,109 |
| Household Income Quintile | | | | | |
| \$200,444+ | 17,512 | +3 | -40 | -37 | 17,474 |
| \$103,985 - \$200,444 | 17,512 | +7 | -52 | -44 | 17,467 |
| \$60,527 - \$103,985 | 17,514 | +11 | -23 | -11 | 17,503 |
| \$33,157 - \$60,527 | 17,511 | +8 | -6 | +1 | 17,513 |
| \$0-\$33,157 | 17,513 | +58 | +1 | +56 | 17,570 |
| Current Law Benefit Type | | | | | |
| Retired worker | 65,687 | 0 | -108 | -108 | 65,578 |
| Widow(er) | 12,506 | 0 | -3 | -2 | 12,503 |
| Spouse | 5,677 | 0 | -11 | -10 | 5,667 |
| Disabled worker | 3,693 | 0 | 0 | 0 | 3,693 |
| None | 0 | +87 | 0 | +86 | 87 |

Source: SSA/Office of Retirement Policy, using MINT 7 Run: 10/30/2015 Ref #: RD0617v1

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