

1. Individual benefit changes, 2070: 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 | 3% | 2% | 72% | 5% | 2% | 98% |
| Sex | | | | | | |
| Female | 3% | 2% | 72% | 5% | 2% | 98% |
| Male | 3% | 2% | 72% | 4% | 2% | 98% |
| Ethnicity/Race | | | | | | |
| Hispanic | 3% | 2% | 73% | 5% | 2% | 98% |
| White | 2% | 2% | 72% | 4% | 2% | 98% |
| Black | 4% | 1% | 77% | 5% | 2% | 98% |
| Other | 2% | 2% | 65% | 4% | 3% | 97% |
| Country of Birth | | | | | | |
| U.S. | 3% | 2% | 73% | 4% | 2% | 98% |
| Foreign | 3% | 2% | 69% | 5% | 2% | 98% |
| Age | | | | | | |
| 60-69 | 3% | 6% | 71% | 5% | 7% | 93% |
| 70-79 | 3% | 0% | 77% | 5% | 0% | 100% |
| 80-89 | 2% | 0% | 70% | 4% | 0% | 100% |
| 90+ | 1% | 0% | 58% | 3% | 0% | 100% |
| Marital Status | | | | | | |
| Married | 3% | 2% | 73% | 5% | 3% | 97% |
| Divorced | 3% | 1% | 75% | 5% | 2% | 98% |
| Widowed | 2% | 0% | 69% | 4% | 0% | 100% |
| Never Married | 2% | 2% | 69% | 4% | 2% | 98% |
| Education | | | | | | |
| Graduate | 1% | 2% | 65% | 3% | 3% | 97% |
| Bachelor | 2% | 2% | 67% | 3% | 3% | 97% |
| Associate | 3% | 2% | 76% | 5% | 2% | 98% |
| High School | 4% | 2% | 76% | 6% | 2% | 98% |
| Less than 12 Yrs | 4% | 1% | 71% | 6% | 2% | 98% |
| Official Poverty | | | | | | |
| Above poverty | 3% | 2% | 72% | 4% | 2% | 98% |
| In poverty | 3% | 0% | 61% | 9% | 1% | 99% |
| Household Income Quintile | | | | | | |
| \$221,317+ | 1% | 3% | 62% | 3% | 5% | 95% |
| \$116,305 - \$221,317 | 2% | 3% | 73% | 4% | 4% | 96% |
| \$67,516 - \$116,305 | 3% | 2% | 77% | 5% | 2% | 98% |
| \$36,533 - \$67,516 | 4% | 1% | 77% | 5% | 1% | 99% |
| \$0-\$36,533 | 3% | 0% | 71% | 6% | 0% | 100% |
| Current Law Benefit Type | | | | | | |
| Retired worker | 3% | 2% | 73% | 4% | 3% | 97% |
| Widow(er) | 2% | 0% | 67% | 4% | 1% | 99% |
| Spouse | 3% | 4% | 74% | 5% | 5% | 95% |
| Disabled worker | 4% | 0% | 70% | 6% | 0% | 100% |

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

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2. Household income changes, 2070: 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 | 1% | 2% | 54% | 1% | 2% | 69% |
| Sex | | | | | | |
| Female | 1% | 1% | 55% | 2% | 2% | 71% |
| Male | 1% | 2% | 53% | 1% | 2% | 67% |
| Ethnicity/Race | | | | | | |
| Hispanic | 1% | 2% | 59% | 2% | 2% | 74% |
| White | 1% | 2% | 53% | 1% | 2% | 67% |
| Black | 1% | 1% | 62% | 2% | 2% | 78% |
| Other | 0% | 2% | 42% | 1% | 3% | 58% |
| Country of Birth | | | | | | |
| U.S. | 1% | 2% | 55% | 1% | 2% | 69% |
| Foreign | 1% | 2% | 52% | 2% | 2% | 69% |
| Age | | | | | | |
| 60-69 | 1% | 6% | 52% | 1% | 6% | 65% |
| 70-79 | 1% | 0% | 59% | 2% | 0% | 72% |
| 80-89 | 1% | 0% | 54% | 2% | 0% | 72% |
| 90+ | 0% | 0% | 36% | 1% | 0% | 57% |
| Marital Status | | | | | | |
| Married | 1% | 3% | 58% | 1% | 3% | 67% |
| Divorced | 1% | 1% | 55% | 2% | 1% | 72% |
| Widowed | 0% | 0% | 49% | 2% | 0% | 70% |
| Never Married | 0% | 2% | 48% | 1% | 2% | 67% |
| Education | | | | | | |
| Graduate | 0% | 2% | 38% | 1% | 2% | 54% |
| Bachelor | 0% | 2% | 42% | 1% | 3% | 56% |
| Associate | 1% | 2% | 61% | 2% | 2% | 74% |
| High School | 1% | 2% | 62% | 2% | 2% | 76% |
| Less than 12 Yrs | 1% | 2% | 59% | 2% | 2% | 77% |
| Official Poverty | | | | | | |
| Above poverty | 1% | 2% | 54% | 1% | 2% | 69% |
| In poverty | 1% | 1% | 55% | 6% | 2% | 90% |
| Household Income Quintile | | | | | | |
| \$221,317+ | 0% | 2% | 12% | 0% | 3% | 17% |
| \$116,305 - \$221,317 | 0% | 3% | 46% | 1% | 3% | 55% |
| \$67,516 - \$116,305 | 1% | 2% | 66% | 2% | 2% | 78% |
| \$36,533 - \$67,516 | 2% | 1% | 75% | 3% | 1% | 91% |
| \$0-\$36,533 | 3% | 0% | 70% | 5% | 0% | 96% |
| Current Law Benefit Type | | | | | | |
| Retired worker | 1% | 2% | 54% | 1% | 2% | 68% |
| Widow(er) | 1% | 0% | 51% | 2% | 0% | 75% |
| Spouse | 1% | 2% | 54% | 2% | 2% | 69% |
| Disabled worker | 1% | 2% | 57% | 2% | 1% | 77% |

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

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**3. Poverty, 2070: Tax Health Insurance Premiums vs. Scheduled
Population: current law beneficiaries aged 60+**

| Characteristic | Poverty Rate | | | Population Change (thousands) |
|----------------------------------|--------------|--------|--------|----------------------------------|
| | Scheduled | Option | Change | |
| Total | 2.1% | 1.8% | -0.3% | -292 |
| Sex | | | | |
| Female | 2.4% | 2.1% | -0.4% | -182 |
| Male | 1.8% | 1.5% | -0.2% | -109 |
| Ethnicity/Race | | | | |
| Hispanic | 2.9% | 2.5% | -0.4% | -102 |
| White | 1.4% | 1.2% | -0.2% | -94 |
| Black | 4.2% | 3.5% | -0.7% | -66 |
| Other | 2.3% | 2.0% | -0.3% | -29 |
| Country of Birth | | | | |
| U.S. | 1.6% | 1.4% | -0.2% | -172 |
| Foreign | 3.9% | 3.3% | -0.5% | -119 |
| Age | | | | |
| 60-69 | 2.4% | 2.0% | -0.4% | -116 |
| 70-79 | 2.0% | 1.8% | -0.3% | -111 |
| 80-89 | 2.1% | 1.9% | -0.2% | -55 |
| 90+ | 1.6% | 1.5% | -0.1% | -7 |
| Marital Status | | | | |
| Married | 0.7% | 0.6% | -0.1% | -57 |
| Divorced | 2.6% | 2.3% | -0.3% | -62 |
| Widowed | 1.9% | 1.6% | -0.4% | -55 |
| Never Married | 5.3% | 4.6% | -0.7% | -117 |
| Education | | | | |
| Graduate | 0.8% | 0.7% | -0.1% | -13 |
| Bachelor | 0.8% | 0.7% | -0.1% | -24 |
| Associate | 1.5% | 1.2% | -0.3% | -55 |
| High School | 2.9% | 2.5% | -0.4% | -124 |
| Less than 12 Yrs | 5.5% | 4.8% | -0.7% | -73 |
| Official Poverty | | | | |
| Above poverty | 0.0% | 0.0% | 0.0% | 1 |
| In poverty | 100.0% | 86.0% | -14.0% | -294 |
| 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% | -2 |
| \$0-\$36,533 | 10.3% | 8.9% | -1.5% | -289 |
| Current Law Benefit Type | | | | |
| Retired worker | 2.2% | 1.9% | -0.3% | -229 |
| Widow(er) | 1.4% | 1.2% | -0.2% | -31 |
| Spouse | 1.9% | 1.8% | -0.1% | -8 |
| Disabled worker | 3.2% | 2.6% | -0.6% | -22 |

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**4. Beneficiary characteristics, 2070: 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 | 99,367 | 100.0 | 73,323 | 100.0 | 1,714 | 100.0 | 71,610 | 100.0 |
| Sex | | | | | | | | |
| Female | 51,669 | 52.0 | 38,042 | 51.9 | 860 | 50.2 | 37,182 | 51.9 |
| Male | 47,698 | 48.0 | 35,281 | 48.1 | 853 | 49.8 | 34,428 | 48.1 |
| Ethnicity/Race | | | | | | | | |
| Hispanic | 23,798 | 23.9 | 17,920 | 24.4 | 444 | 25.9 | 17,476 | 24.4 |
| White | 55,862 | 56.2 | 41,040 | 56.0 | 914 | 53.3 | 40,126 | 56.0 |
| Black | 10,043 | 10.1 | 7,831 | 10.7 | 136 | 7.9 | 7,695 | 10.7 |
| Other | 9,664 | 9.7 | 6,533 | 8.9 | 220 | 12.8 | 6,314 | 8.8 |
| Country of Birth | | | | | | | | |
| U.S. | 77,479 | 78.0 | 57,943 | 79.0 | 1,369 | 79.9 | 56,574 | 79.0 |
| Foreign | 21,888 | 22.0 | 15,380 | 21.0 | 345 | 20.1 | 15,035 | 21.0 |
| Age | | | | | | | | |
| 60-69 | 28,040 | 28.2 | 21,546 | 29.4 | 1,572 | 91.7 | 19,974 | 27.9 |
| 70-79 | 37,436 | 37.7 | 28,979 | 39.5 | 84 | 4.9 | 28,895 | 40.4 |
| 80-89 | 24,883 | 25.0 | 17,514 | 23.9 | 43 | 2.5 | 17,471 | 24.4 |
| 90+ | 9,008 | 9.1 | 5,284 | 7.2 | 15 | 0.9 | 5,269 | 7.4 |
| Marital Status | | | | | | | | |
| Married | 45,743 | 46.0 | 34,501 | 47.1 | 1,103 | 64.4 | 33,398 | 46.6 |
| Divorced | 20,504 | 20.6 | 15,608 | 21.3 | 252 | 14.7 | 15,356 | 21.4 |
| Widowed | 15,160 | 15.3 | 10,437 | 14.2 | 40 | 2.3 | 10,397 | 14.5 |
| Never Married | 17,960 | 18.1 | 12,777 | 17.4 | 318 | 18.6 | 12,459 | 17.4 |
| Education | | | | | | | | |
| Graduate | 13,734 | 13.8 | 9,108 | 12.4 | 237 | 13.8 | 8,870 | 12.4 |
| Bachelor | 22,043 | 22.2 | 15,324 | 20.9 | 476 | 27.8 | 14,848 | 20.7 |
| Associate | 21,221 | 21.4 | 16,571 | 22.6 | 369 | 21.5 | 16,202 | 22.6 |
| High School | 31,969 | 32.2 | 24,743 | 33.7 | 489 | 28.5 | 24,254 | 33.9 |
| Less than 12 Yrs | 10,400 | 10.5 | 7,578 | 10.3 | 142 | 8.3 | 7,435 | 10.4 |
| Official Poverty | | | | | | | | |
| Above poverty | 97,260 | 97.9 | 72,034 | 98.2 | 1,704 | 99.4 | 70,331 | 98.2 |
| In poverty | 2,107 | 2.1 | 1,289 | 1.8 | 10 | 0.6 | 1,279 | 1.8 |
| Household Income Quintile | | | | | | | | |
| \$221,317+ | 19,874 | 20.0 | 12,944 | 17.7 | 649 | 37.9 | 12,295 | 17.2 |
| \$116,305 - \$221,317 | 19,873 | 20.0 | 15,063 | 20.5 | 575 | 33.6 | 14,488 | 20.2 |
| \$67,516 - \$116,305 | 19,873 | 20.0 | 15,613 | 21.3 | 346 | 20.2 | 15,266 | 21.3 |
| \$36,533 - \$67,516 | 19,870 | 20.0 | 15,472 | 21.1 | 106 | 6.2 | 15,366 | 21.5 |
| \$0-\$36,533 | 19,877 | 20.0 | 14,231 | 19.4 | 37 | 2.1 | 14,194 | 19.8 |
| Current Law Benefit Type | | | | | | | | |
| Retired worker | 76,149 | 76.6 | 56,983 | 77.7 | 1,464 | 85.4 | 55,519 | 77.5 |
| Widow(er) | 13,655 | 13.7 | 9,205 | 12.6 | 55 | 3.2 | 9,150 | 12.8 |
| Spouse | 5,494 | 5.5 | 4,277 | 5.8 | 195 | 11.4 | 4,083 | 5.7 |
| Disabled worker | 4,069 | 4.1 | 2,858 | 3.9 | ... | ... | 2,858 | 4.0 |

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, 2070: 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 | 99,367 | +106 | -118 | -12 | 99,355 |
| Sex | | | | | |
| Female | 51,669 | +48 | -62 | -14 | 51,655 |
| Male | 47,698 | +58 | -56 | +1 | 47,700 |
| Ethnicity/Race | | | | | |
| Hispanic | 23,798 | +36 | -26 | +10 | 23,809 |
| White | 55,862 | +37 | -65 | -28 | 55,834 |
| Black | 10,043 | +9 | -13 | -4 | 10,038 |
| Other | 9,664 | +24 | -14 | +9 | 9,673 |
| Country of Birth | | | | | |
| U.S. | 77,479 | +38 | -94 | -55 | 77,423 |
| Foreign | 21,888 | +68 | -24 | +43 | 21,931 |
| Age | | | | | |
| 60-69 | 28,040 | +51 | -118 | -67 | 27,973 |
| 70-79 | 37,436 | +40 | +1 | +39 | 37,475 |
| 80-89 | 24,883 | +11 | 0 | +10 | 24,894 |
| 90+ | 9,008 | +5 | 0 | +4 | 9,013 |
| Marital Status | | | | | |
| Married | 45,743 | +35 | -82 | -47 | 45,696 |
| Divorced | 20,504 | +17 | -16 | 0 | 20,505 |
| Widowed | 15,160 | +22 | -2 | +20 | 15,180 |
| Never Married | 17,960 | +32 | -18 | +13 | 17,973 |
| Education | | | | | |
| Graduate | 13,734 | +7 | -14 | -7 | 13,727 |
| Bachelor | 22,043 | +15 | -40 | -24 | 22,018 |
| Associate | 21,221 | +19 | -35 | -15 | 21,206 |
| High School | 31,969 | +44 | -26 | +17 | 31,987 |
| Less than 12 Yrs | 10,400 | +21 | -4 | +17 | 10,417 |
| Official Poverty | | | | | |
| Above poverty | 97,260 | +46 | -118 | -71 | 97,189 |
| In poverty | 2,107 | +60 | +1 | +58 | 2,166 |
| Household Income Quintile | | | | | |
| \$221,317+ | 19,874 | +7 | -36 | -28 | 19,845 |
| \$116,305 - \$221,317 | 19,873 | +14 | -50 | -35 | 19,838 |
| \$67,516 - \$116,305 | 19,873 | +8 | -29 | -20 | 19,852 |
| \$36,533 - \$67,516 | 19,870 | +11 | -4 | +7 | 19,877 |
| \$0-\$36,533 | 19,877 | +66 | +1 | +65 | 19,942 |
| Current Law Benefit Type | | | | | |
| Retired worker | 76,149 | 0 | -109 | -109 | 76,040 |
| Widow(er) | 13,655 | 0 | 0 | 0 | 13,654 |
| Spouse | 5,494 | 0 | -9 | -8 | 5,485 |
| Disabled worker | 4,069 | 0 | 0 | 0 | 4,069 |
| None | 0 | +106 | 0 | +105 | 106 |

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1. Individual benefit changes, 2070: 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 | 36% | 0% | 99% | 39% | 1% | 99% |
| Sex | | | | | | |
| Female | 37% | 0% | 100% | 39% | 1% | 99% |
| Male | 36% | 0% | 99% | 38% | 1% | 99% |
| Ethnicity/Race | | | | | | |
| Hispanic | 37% | 1% | 99% | 40% | 1% | 99% |
| White | 36% | 0% | 99% | 38% | 1% | 99% |
| Black | 38% | 0% | 100% | 40% | 0% | 100% |
| Other | 35% | 1% | 99% | 38% | 1% | 99% |
| Country of Birth | | | | | | |
| U.S. | 36% | 0% | 99% | 39% | 1% | 99% |
| Foreign | 36% | 0% | 100% | 40% | 1% | 99% |
| Age | | | | | | |
| 60-69 | 37% | 2% | 98% | 40% | 2% | 98% |
| 70-79 | 37% | 0% | 100% | 39% | 0% | 100% |
| 80-89 | 36% | 0% | 100% | 38% | 0% | 100% |
| 90+ | 34% | 0% | 100% | 37% | 0% | 100% |
| Marital Status | | | | | | |
| Married | 37% | 1% | 99% | 39% | 1% | 99% |
| Divorced | 37% | 0% | 100% | 39% | 0% | 100% |
| Widowed | 36% | 0% | 100% | 39% | 0% | 100% |
| Never Married | 36% | 0% | 100% | 38% | 0% | 99% |
| Education | | | | | | |
| Graduate | 35% | 1% | 99% | 37% | 1% | 99% |
| Bachelor | 35% | 1% | 99% | 37% | 1% | 99% |
| Associate | 37% | 0% | 99% | 39% | 1% | 99% |
| High School | 38% | 0% | 100% | 40% | 0% | 99% |
| Less than 12 Yrs | 38% | 0% | 100% | 41% | 0% | 99% |
| Official Poverty | | | | | | |
| Above poverty | 36% | 0% | 99% | 39% | 1% | 99% |
| In poverty | 36% | 0% | 100% | 45% | 0% | 100% |
| Household Income Quintile | | | | | | |
| \$221,317+ | 34% | 1% | 99% | 37% | 1% | 99% |
| \$116,305 - \$221,317 | 36% | 1% | 99% | 38% | 1% | 99% |
| \$67,516 - \$116,305 | 37% | 0% | 99% | 39% | 1% | 99% |
| \$36,533 - \$67,516 | 38% | 0% | 100% | 40% | 0% | 100% |
| \$0-\$36,533 | 37% | 0% | 100% | 41% | 0% | 100% |
| Current Law Benefit Type | | | | | | |
| Retired worker | 36% | 1% | 99% | 39% | 1% | 99% |
| Widow(er) | 35% | 0% | 100% | 38% | 0% | 100% |
| Spouse | 37% | 0% | 100% | 39% | 1% | 99% |
| Disabled worker | 38% | 0% | 100% | 41% | 0% | 100% |

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2. Household income changes, 2070: 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 | 14% | 0% | 97% | 15% | 0% | 98% |
| Sex | | | | | | |
| Female | 15% | 0% | 97% | 16% | 0% | 98% |
| Male | 13% | 0% | 97% | 14% | 0% | 98% |
| Ethnicity/Race | | | | | | |
| Hispanic | 16% | 0% | 98% | 16% | 0% | 98% |
| White | 13% | 0% | 98% | 14% | 0% | 98% |
| Black | 19% | 1% | 98% | 19% | 1% | 98% |
| Other | 10% | 0% | 95% | 11% | 0% | 96% |
| Country of Birth | | | | | | |
| U.S. | 14% | 0% | 98% | 15% | 0% | 98% |
| Foreign | 13% | 0% | 96% | 15% | 0% | 97% |
| Age | | | | | | |
| 60-69 | 12% | 1% | 95% | 12% | 1% | 95% |
| 70-79 | 15% | 0% | 99% | 16% | 0% | 99% |
| 80-89 | 16% | 0% | 99% | 17% | 0% | 99% |
| 90+ | 11% | 0% | 97% | 13% | 0% | 97% |
| Marital Status | | | | | | |
| Married | 13% | 0% | 97% | 14% | 0% | 98% |
| Divorced | 15% | 0% | 98% | 16% | 0% | 98% |
| Widowed | 15% | 0% | 98% | 17% | 0% | 98% |
| Never Married | 14% | 0% | 97% | 16% | 0% | 97% |
| Education | | | | | | |
| Graduate | 9% | 0% | 96% | 11% | 0% | 97% |
| Bachelor | 10% | 0% | 97% | 11% | 0% | 97% |
| Associate | 16% | 0% | 98% | 16% | 0% | 99% |
| High School | 17% | 0% | 98% | 18% | 0% | 98% |
| Less than 12 Yrs | 18% | 0% | 97% | 19% | 0% | 98% |
| Official Poverty | | | | | | |
| Above poverty | 14% | 0% | 98% | 15% | 0% | 98% |
| In poverty | 29% | 4% | 87% | 34% | 4% | 91% |
| Household Income Quintile | | | | | | |
| \$221,317+ | 3% | 0% | 91% | 4% | 0% | 92% |
| \$116,305 - \$221,317 | 8% | 0% | 99% | 8% | 0% | 99% |
| \$67,516 - \$116,305 | 15% | 0% | 99% | 15% | 0% | 99% |
| \$36,533 - \$67,516 | 24% | 0% | 100% | 25% | 0% | 100% |
| \$0-\$36,533 | 32% | 0% | 99% | 34% | 0% | 99% |
| Current Law Benefit Type | | | | | | |
| Retired worker | 13% | 0% | 97% | 14% | 0% | 98% |
| Widow(er) | 18% | 0% | 98% | 20% | 0% | 99% |
| Spouse | 14% | 0% | 97% | 16% | 0% | 98% |
| Disabled worker | 17% | 0% | 98% | 18% | 0% | 99% |

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3. Poverty, 2070: Tax Health Insurance Premiums vs. Payable
Population: current law beneficiaries aged 60+

| Characteristic | Poverty Rate | | | Population Change (thousands) |
|----------------------------------|--------------|--------|--------|----------------------------------|
| | Payable | Option | Change | |
| Total | 4.7% | 1.8% | -2.8% | -2,827 |
| Sex | | | | |
| Female | 5.3% | 2.1% | -3.2% | -1,660 |
| Male | 4.0% | 1.5% | -2.4% | -1,166 |
| Ethnicity/Race | | | | |
| Hispanic | 6.3% | 2.5% | -3.8% | -911 |
| White | 3.2% | 1.2% | -2.0% | -1,100 |
| Black | 9.0% | 3.5% | -5.4% | -543 |
| Other | 4.8% | 2.0% | -2.8% | -271 |
| Country of Birth | | | | |
| U.S. | 3.9% | 1.4% | -2.5% | -1,973 |
| Foreign | 7.2% | 3.3% | -3.9% | -853 |
| Age | | | | |
| 60-69 | 4.9% | 2.0% | -2.9% | -814 |
| 70-79 | 4.5% | 1.8% | -2.8% | -1,030 |
| 80-89 | 4.9% | 1.9% | -3.0% | -752 |
| 90+ | 4.0% | 1.5% | -2.6% | -230 |
| Marital Status | | | | |
| Married | 1.5% | 0.6% | -0.9% | -395 |
| Divorced | 6.1% | 2.3% | -3.8% | -774 |
| Widowed | 5.2% | 1.6% | -3.6% | -547 |
| Never Married | 10.8% | 4.6% | -6.2% | -1,109 |
| Education | | | | |
| Graduate | 1.6% | 0.7% | -1.0% | -132 |
| Bachelor | 1.7% | 0.7% | -1.0% | -222 |
| Associate | 3.7% | 1.2% | -2.5% | -525 |
| High School | 6.6% | 2.5% | -4.1% | -1,306 |
| Less than 12 Yrs | 11.0% | 4.8% | -6.1% | -639 |
| Official Poverty | | | | |
| Above poverty | 2.6% | 0.0% | -2.6% | -2,536 |
| In poverty | 99.8% | 86.0% | -13.8% | -290 |
| 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% | -0.6% | -109 |
| \$0-\$36,533 | 22.3% | 8.9% | -13.5% | -2,677 |
| Current Law Benefit Type | | | | |
| Retired worker | 4.6% | 1.9% | -2.7% | -2,084 |
| Widow(er) | 4.5% | 1.2% | -3.3% | -446 |
| Spouse | 4.0% | 1.8% | -2.3% | -124 |
| Disabled worker | 6.8% | 2.6% | -4.2% | -171 |

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, 2070: 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 | 99,367 | 100.0 | 99,312 | 100.0 | 469 | 100.0 | 98,843 | 100.0 |
| Sex | | | | | | | | |
| Female | 51,669 | 52.0 | 51,646 | 52.0 | 234 | 49.8 | 51,412 | 52.0 |
| Male | 47,698 | 48.0 | 47,666 | 48.0 | 235 | 50.2 | 47,431 | 48.0 |
| Ethnicity/Race | | | | | | | | |
| Hispanic | 23,798 | 23.9 | 23,789 | 24.0 | 121 | 25.9 | 23,668 | 23.9 |
| White | 55,862 | 56.2 | 55,835 | 56.2 | 254 | 54.2 | 55,581 | 56.2 |
| Black | 10,043 | 10.1 | 10,040 | 10.1 | 31 | 6.7 | 10,009 | 10.1 |
| Other | 9,664 | 9.7 | 9,648 | 9.7 | 62 | 13.3 | 9,586 | 9.7 |
| Country of Birth | | | | | | | | |
| U.S. | 77,479 | 78.0 | 77,438 | 78.0 | 375 | 79.9 | 77,063 | 78.0 |
| Foreign | 21,888 | 22.0 | 21,874 | 22.0 | 94 | 20.1 | 21,780 | 22.0 |
| Age | | | | | | | | |
| 60-69 | 28,040 | 28.2 | 27,985 | 28.2 | 468 | 99.9 | 27,517 | 27.8 |
| 70-79 | 37,436 | 37.7 | 37,436 | 37.7 | 1 | 0.1 | 37,435 | 37.9 |
| 80-89 | 24,883 | 25.0 | 24,883 | 25.1 | ... | ... | 24,883 | 25.2 |
| 90+ | 9,008 | 9.1 | 9,008 | 9.1 | ... | ... | 9,008 | 9.1 |
| Marital Status | | | | | | | | |
| Married | 45,743 | 46.0 | 45,715 | 46.0 | 362 | 77.1 | 45,353 | 45.9 |
| Divorced | 20,504 | 20.6 | 20,497 | 20.6 | 53 | 11.3 | 20,443 | 20.7 |
| Widowed | 15,160 | 15.3 | 15,160 | 15.3 | 2 | 0.4 | 15,158 | 15.3 |
| Never Married | 17,960 | 18.1 | 17,940 | 18.1 | 52 | 11.2 | 17,888 | 18.1 |
| Education | | | | | | | | |
| Graduate | 13,734 | 13.8 | 13,731 | 13.8 | 74 | 15.8 | 13,657 | 13.8 |
| Bachelor | 22,043 | 22.2 | 22,020 | 22.2 | 138 | 29.4 | 21,882 | 22.1 |
| Associate | 21,221 | 21.4 | 21,209 | 21.4 | 106 | 22.6 | 21,103 | 21.3 |
| High School | 31,969 | 32.2 | 31,957 | 32.2 | 116 | 24.8 | 31,840 | 32.2 |
| Less than 12 Yrs | 10,400 | 10.5 | 10,395 | 10.5 | 35 | 7.4 | 10,361 | 10.5 |
| Official Poverty | | | | | | | | |
| Above poverty | 97,260 | 97.9 | 97,205 | 97.9 | 468 | 99.9 | 96,737 | 97.9 |
| In poverty | 2,107 | 2.1 | 2,107 | 2.1 | 1 | 0.1 | 2,106 | 2.1 |
| Household Income Quintile | | | | | | | | |
| \$221,317+ | 19,874 | 20.0 | 19,854 | 20.0 | 168 | 35.8 | 19,686 | 19.9 |
| \$116,305 - \$221,317 | 19,873 | 20.0 | 19,855 | 20.0 | 179 | 38.2 | 19,676 | 19.9 |
| \$67,516 - \$116,305 | 19,873 | 20.0 | 19,859 | 20.0 | 97 | 20.8 | 19,762 | 20.0 |
| \$36,533 - \$67,516 | 19,870 | 20.0 | 19,868 | 20.0 | 20 | 4.3 | 19,848 | 20.1 |
| \$0-\$36,533 | 19,877 | 20.0 | 19,875 | 20.0 | 4 | 0.9 | 19,871 | 20.1 |
| Current Law Benefit Type | | | | | | | | |
| Retired worker | 76,149 | 76.6 | 76,094 | 76.6 | 437 | 93.3 | 75,656 | 76.5 |
| Widow(er) | 13,655 | 13.7 | 13,655 | 13.7 | 9 | 1.9 | 13,646 | 13.8 |
| Spouse | 5,494 | 5.5 | 5,494 | 5.5 | 23 | 4.8 | 5,471 | 5.5 |
| Disabled worker | 4,069 | 4.1 | 4,069 | 4.1 | ... | ... | 4,069 | 4.1 |

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, 2070: 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 | 99,367 | +106 | -118 | -12 | 99,355 |
| Sex | | | | | |
| Female | 51,669 | +48 | -62 | -14 | 51,655 |
| Male | 47,698 | +58 | -56 | +1 | 47,700 |
| Ethnicity/Race | | | | | |
| Hispanic | 23,798 | +36 | -26 | +10 | 23,809 |
| White | 55,862 | +37 | -65 | -28 | 55,834 |
| Black | 10,043 | +9 | -13 | -4 | 10,038 |
| Other | 9,664 | +24 | -14 | +9 | 9,673 |
| Country of Birth | | | | | |
| U.S. | 77,479 | +38 | -94 | -55 | 77,423 |
| Foreign | 21,888 | +68 | -24 | +43 | 21,931 |
| Age | | | | | |
| 60-69 | 28,040 | +51 | -118 | -67 | 27,973 |
| 70-79 | 37,436 | +40 | +1 | +39 | 37,475 |
| 80-89 | 24,883 | +11 | 0 | +10 | 24,894 |
| 90+ | 9,008 | +5 | 0 | +4 | 9,013 |
| Marital Status | | | | | |
| Married | 45,743 | +35 | -82 | -47 | 45,696 |
| Divorced | 20,504 | +17 | -16 | 0 | 20,505 |
| Widowed | 15,160 | +22 | -2 | +20 | 15,180 |
| Never Married | 17,960 | +32 | -18 | +13 | 17,973 |
| Education | | | | | |
| Graduate | 13,734 | +7 | -14 | -7 | 13,727 |
| Bachelor | 22,043 | +15 | -40 | -24 | 22,018 |
| Associate | 21,221 | +19 | -35 | -15 | 21,206 |
| High School | 31,969 | +44 | -26 | +17 | 31,987 |
| Less than 12 Yrs | 10,400 | +21 | -4 | +17 | 10,417 |
| Official Poverty | | | | | |
| Above poverty | 97,260 | +46 | -118 | -71 | 97,189 |
| In poverty | 2,107 | +60 | +1 | +58 | 2,166 |
| Household Income Quintile | | | | | |
| \$221,317+ | 19,874 | +7 | -36 | -28 | 19,845 |
| \$116,305 - \$221,317 | 19,873 | +14 | -50 | -35 | 19,838 |
| \$67,516 - \$116,305 | 19,873 | +8 | -29 | -20 | 19,852 |
| \$36,533 - \$67,516 | 19,870 | +11 | -4 | +7 | 19,877 |
| \$0-\$36,533 | 19,877 | +66 | +1 | +65 | 19,942 |
| Current Law Benefit Type | | | | | |
| Retired worker | 76,149 | 0 | -109 | -109 | 76,040 |
| Widow(er) | 13,655 | 0 | 0 | 0 | 13,654 |
| Spouse | 5,494 | 0 | -9 | -8 | 5,485 |
| Disabled worker | 4,069 | 0 | 0 | 0 | 4,069 |
| None | 0 | +106 | 0 | +105 | 106 |

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

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