

Detailed Single Year Tables
Category of Change: Coverage of Employment

Proposed Provision: F6. Apply a 6.2 percent tax on investment income as defined in the Affordable Care Act (ACA), with unindexed thresholds as in the ACA (\$200,000 for single filer, \$250,000 for married filing jointly), starting in 2018. Proceeds go to the OASDI Trust Fund.

| Year | Proposal | | | Trust Fund Ratio 1-1-year | Change from Present Law | | |
|------|-----------|-------------|----------------|------------------------------|-------------------------|-------------|----------------|
| | Cost Rate | Income Rate | Annual Balance | | Cost Rate | Income Rate | Annual Balance |
| 2016 | 14.05 | 12.94 | -1.10 | 303 | 0.00 | 0.00 | 0.00 |
| 2017 | 13.72 | 12.92 | -0.80 | 293 | 0.00 | 0.00 | 0.00 |
| 2018 | 13.86 | 13.69 | -0.17 | 277 | 0.00 | 0.73 | 0.73 |
| 2019 | 13.99 | 13.71 | -0.28 | 267 | 0.00 | 0.74 | 0.74 |
| 2020 | 14.13 | 13.73 | -0.40 | 256 | 0.00 | 0.75 | 0.75 |
| 2021 | 14.27 | 13.76 | -0.51 | 246 | 0.00 | 0.75 | 0.76 |
| 2022 | 14.49 | 13.80 | -0.69 | 235 | 0.00 | 0.76 | 0.76 |
| 2023 | 14.76 | 13.83 | -0.93 | 223 | 0.00 | 0.77 | 0.77 |
| 2024 | 15.02 | 13.87 | -1.16 | 211 | 0.00 | 0.77 | 0.78 |
| 2025 | 15.28 | 13.89 | -1.39 | 198 | 0.00 | 0.78 | 0.78 |
| 2026 | 15.47 | 13.92 | -1.55 | 185 | 0.00 | 0.79 | 0.79 |
| 2027 | 15.65 | 13.94 | -1.71 | 173 | 0.00 | 0.80 | 0.80 |
| 2028 | 15.81 | 13.96 | -1.85 | 161 | 0.00 | 0.81 | 0.81 |
| 2029 | 15.96 | 13.98 | -1.98 | 149 | 0.00 | 0.81 | 0.82 |
| 2030 | 16.10 | 14.00 | -2.10 | 137 | 0.00 | 0.82 | 0.82 |
| 2031 | 16.22 | 14.02 | -2.20 | 124 | 0.00 | 0.83 | 0.83 |
| 2032 | 16.32 | 14.04 | -2.29 | 112 | 0.00 | 0.84 | 0.84 |
| 2033 | 16.41 | 14.05 | -2.35 | 99 | 0.00 | 0.85 | 0.85 |
| 2034 | 16.46 | 14.07 | -2.40 | 85 | 0.00 | 0.85 | 0.86 |
| 2035 | 16.49 | 14.08 | -2.42 | 72 | 0.00 | 0.86 | 0.86 |
| 2036 | 16.55 | 14.09 | -2.46 | 58 | 0.00 | 0.87 | 0.87 |
| 2037 | 16.60 | 14.11 | -2.49 | 44 | 0.00 | 0.88 | 0.88 |
| 2038 | 16.61 | 14.12 | -2.49 | 30 | 0.00 | 0.89 | 0.89 |
| 2039 | 16.61 | 14.13 | -2.48 | 16 | 0.00 | 0.90 | 0.90 |
| 2040 | 16.59 | 14.14 | -2.45 | 1 | 0.00 | 0.91 | 0.91 |
| 2041 | 16.56 | 14.15 | -2.41 | ---- | 0.00 | 0.91 | 0.92 |
| 2042 | 16.53 | 14.15 | -2.38 | ---- | 0.00 | 0.92 | 0.92 |
| 2043 | 16.50 | 14.16 | -2.34 | ---- | 0.00 | 0.93 | 0.93 |
| 2044 | 16.47 | 14.17 | -2.30 | ---- | 0.00 | 0.94 | 0.94 |
| 2045 | 16.45 | 14.18 | -2.27 | ---- | 0.00 | 0.95 | 0.95 |
| 2046 | 16.42 | 14.18 | -2.24 | ---- | 0.00 | 0.95 | 0.95 |
| 2047 | 16.40 | 14.19 | -2.21 | ---- | 0.00 | 0.96 | 0.96 |
| 2048 | 16.38 | 14.20 | -2.18 | ---- | 0.00 | 0.97 | 0.97 |
| 2049 | 16.37 | 14.21 | -2.16 | ---- | 0.00 | 0.97 | 0.98 |
| 2050 | 16.36 | 14.21 | -2.14 | ---- | 0.00 | 0.98 | 0.98 |
| 2051 | 16.36 | 14.22 | -2.14 | ---- | 0.00 | 0.99 | 0.99 |
| 2052 | 16.37 | 14.23 | -2.14 | ---- | 0.00 | 0.99 | 0.99 |
| 2053 | 16.39 | 14.24 | -2.16 | ---- | 0.00 | 1.00 | 1.00 |
| 2054 | 16.42 | 14.24 | -2.18 | ---- | 0.00 | 1.00 | 1.01 |
| 2055 | 16.46 | 14.25 | -2.21 | ---- | 0.00 | 1.01 | 1.01 |
| 2056 | 16.51 | 14.26 | -2.24 | ---- | 0.00 | 1.02 | 1.02 |
| 2057 | 16.56 | 14.27 | -2.28 | ---- | 0.00 | 1.02 | 1.02 |
| 2058 | 16.60 | 14.28 | -2.32 | ---- | 0.00 | 1.03 | 1.03 |
| 2059 | 16.66 | 14.29 | -2.37 | ---- | 0.00 | 1.03 | 1.03 |
| 2060 | 16.71 | 14.30 | -2.41 | ---- | 0.00 | 1.04 | 1.04 |
| 2061 | 16.76 | 14.31 | -2.45 | ---- | 0.00 | 1.04 | 1.04 |
| 2062 | 16.81 | 14.32 | -2.49 | ---- | 0.00 | 1.05 | 1.05 |
| 2063 | 16.86 | 14.32 | -2.53 | ---- | 0.00 | 1.05 | 1.05 |
| 2064 | 16.90 | 14.33 | -2.57 | ---- | 0.00 | 1.06 | 1.06 |
| 2065 | 16.95 | 14.34 | -2.61 | ---- | 0.00 | 1.06 | 1.06 |
| 2066 | 17.01 | 14.35 | -2.66 | ---- | 0.00 | 1.07 | 1.07 |
| 2067 | 17.06 | 14.36 | -2.70 | ---- | 0.00 | 1.07 | 1.07 |
| 2068 | 17.11 | 14.36 | -2.75 | ---- | 0.00 | 1.07 | 1.08 |
| 2069 | 17.16 | 14.37 | -2.79 | ---- | 0.00 | 1.08 | 1.08 |
| 2070 | 17.22 | 14.38 | -2.84 | ---- | 0.00 | 1.08 | 1.08 |
| 2071 | 17.26 | 14.39 | -2.88 | ---- | 0.00 | 1.09 | 1.09 |
| 2072 | 17.30 | 14.39 | -2.91 | ---- | 0.00 | 1.09 | 1.09 |
| 2073 | 17.34 | 14.40 | -2.94 | ---- | 0.00 | 1.09 | 1.10 |
| 2074 | 17.37 | 14.41 | -2.96 | ---- | 0.00 | 1.10 | 1.10 |
| 2075 | 17.39 | 14.41 | -2.98 | ---- | 0.00 | 1.10 | 1.10 |
| 2076 | 17.40 | 14.42 | -2.99 | ---- | 0.00 | 1.11 | 1.11 |
| 2077 | 17.41 | 14.42 | -2.99 | ---- | 0.00 | 1.11 | 1.11 |
| 2078 | 17.41 | 14.42 | -2.98 | ---- | 0.00 | 1.11 | 1.11 |
| 2079 | 17.40 | 14.43 | -2.98 | ---- | 0.00 | 1.12 | 1.12 |
| 2080 | 17.40 | 14.43 | -2.97 | ---- | 0.00 | 1.12 | 1.12 |
| 2081 | 17.40 | 14.43 | -2.97 | ---- | 0.00 | 1.12 | 1.12 |
| 2082 | 17.40 | 14.44 | -2.97 | ---- | 0.00 | 1.13 | 1.13 |
| 2083 | 17.42 | 14.44 | -2.98 | ---- | 0.00 | 1.13 | 1.13 |
| 2084 | 17.44 | 14.45 | -2.99 | ---- | 0.00 | 1.13 | 1.13 |
| 2085 | 17.47 | 14.45 | -3.02 | ---- | 0.00 | 1.13 | 1.14 |
| 2086 | 17.50 | 14.45 | -3.05 | ---- | 0.00 | 1.14 | 1.14 |
| 2087 | 17.54 | 14.46 | -3.08 | ---- | 0.00 | 1.14 | 1.14 |
| 2088 | 17.58 | 14.47 | -3.12 | ---- | 0.00 | 1.14 | 1.14 |
| 2089 | 17.63 | 14.47 | -3.16 | ---- | 0.00 | 1.15 | 1.15 |
| 2090 | 17.68 | 14.48 | -3.20 | ---- | 0.00 | 1.15 | 1.15 |
| 2091 | 17.72 | 14.48 | -3.24 | ---- | 0.00 | 1.15 | 1.15 |

| Summarized Estimates: Proposal | | | | |
|--------------------------------|-----------|-------------|-------------------|--|
| Year | Cost Rate | Income Rate | Actuarial Balance | Year of reserve depletion ¹ |
| 2016 | 14.05% | 12.94% | -1.10% | 2034 |
| -2090 | 16.50% | 14.77% | -1.73% | 2040 |

| Summarized Estimates: Change from Present Law | | |
|---|-------------|-------------------|
| Cost Rate | Income Rate | Actuarial Balance |
| 0.00% | 0.93% | 0.93% |

¹ Under present law, the year of Trust Fund reserve depletion is 2034.