

Detailed Single Year Tables
Category of Change: Family Members

Proposed Provision: D5. Limit the spousal benefit to that received by the spouse of the 75th percentile career-average worker, beginning with retired workers newly eligible in 2029. For future cohorts, this limit would be indexed for inflation annually using chain weighted CPI-U. The provision affects divorced spouses and young spouses (retired workers) but not spouses of disabled workers.

| Proposal | | | | | Change from Current Law | | |
|--|------------------|--------------------|-----------------------|-----------------------|--|--------------------|-----------------------|
| Expressed as a percentage of current-law taxable payroll | | | | | Expressed as a percentage of current-law taxable payroll | | |
| Year | Cost Rate | Income Rate | Annual Balance | Trust Fund | Cost Rate | Income Rate | Annual Balance |
| | | | | Ratio 1-1-year | | | |
| 2022 | 14.05 | 12.79 | -1.26 | 230 | 0.00 | 0.00 | 0.00 |
| 2023 | 14.31 | 13.04 | -1.27 | 211 | 0.00 | 0.00 | 0.00 |
| 2024 | 14.45 | 12.95 | -1.49 | 194 | 0.00 | 0.00 | 0.00 |
| 2025 | 14.66 | 12.97 | -1.69 | 177 | 0.00 | 0.00 | 0.00 |
| 2026 | 14.88 | 13.08 | -1.80 | 160 | 0.00 | 0.00 | 0.00 |
| 2027 | 15.10 | 13.10 | -2.00 | 143 | 0.00 | 0.00 | 0.00 |
| 2028 | 15.33 | 13.14 | -2.19 | 126 | 0.00 | 0.00 | 0.00 |
| 2029 | 15.53 | 13.17 | -2.35 | 109 | -0.00 | -0.00 | 0.00 |
| 2030 | 15.72 | 13.20 | -2.52 | 91 | -0.00 | -0.00 | 0.00 |
| 2031 | 15.90 | 13.23 | -2.67 | 74 | -0.00 | -0.00 | 0.00 |
| 2032 | 16.07 | 13.24 | -2.82 | 57 | -0.00 | -0.00 | 0.00 |
| 2033 | 16.20 | 13.26 | -2.95 | 39 | -0.00 | -0.00 | 0.00 |
| 2034 | 16.32 | 13.26 | -3.05 | 21 | -0.01 | -0.00 | 0.01 |
| 2035 | 16.41 | 13.27 | -3.14 | 3 | -0.01 | -0.00 | 0.01 |
| 2036 | 16.48 | 13.28 | -3.21 | ---- | -0.01 | -0.00 | 0.01 |
| 2037 | 16.56 | 13.29 | -3.27 | ---- | -0.02 | -0.00 | 0.02 |
| 2038 | 16.62 | 13.29 | -3.32 | ---- | -0.02 | -0.00 | 0.02 |
| 2039 | 16.66 | 13.29 | -3.36 | ---- | -0.03 | -0.00 | 0.03 |
| 2040 | 16.68 | 13.30 | -3.39 | ---- | -0.04 | -0.00 | 0.03 |
| 2041 | 16.70 | 13.30 | -3.40 | ---- | -0.04 | -0.00 | 0.04 |
| 2042 | 16.72 | 13.30 | -3.42 | ---- | -0.05 | -0.00 | 0.05 |
| 2043 | 16.73 | 13.30 | -3.43 | ---- | -0.05 | -0.00 | 0.05 |
| 2044 | 16.75 | 13.30 | -3.44 | ---- | -0.06 | -0.00 | 0.05 |
| 2045 | 16.76 | 13.30 | -3.46 | ---- | -0.06 | -0.00 | 0.06 |
| 2046 | 16.77 | 13.31 | -3.47 | ---- | -0.07 | -0.00 | 0.06 |
| 2047 | 16.79 | 13.31 | -3.49 | ---- | -0.07 | -0.00 | 0.07 |
| 2048 | 16.81 | 13.31 | -3.51 | ---- | -0.07 | -0.00 | 0.07 |
| 2049 | 16.84 | 13.31 | -3.53 | ---- | -0.08 | -0.00 | 0.07 |
| 2050 | 16.87 | 13.31 | -3.55 | ---- | -0.08 | -0.00 | 0.08 |
| 2051 | 16.90 | 13.32 | -3.58 | ---- | -0.09 | -0.01 | 0.08 |
| 2052 | 16.92 | 13.32 | -3.61 | ---- | -0.09 | -0.01 | 0.08 |
| 2053 | 16.96 | 13.32 | -3.64 | ---- | -0.09 | -0.01 | 0.09 |
| 2054 | 17.00 | 13.33 | -3.68 | ---- | -0.09 | -0.01 | 0.09 |
| 2055 | 17.05 | 13.33 | -3.72 | ---- | -0.10 | -0.01 | 0.09 |
| 2056 | 17.10 | 13.33 | -3.77 | ---- | -0.10 | -0.01 | 0.09 |
| 2057 | 17.16 | 13.34 | -3.82 | ---- | -0.10 | -0.01 | 0.10 |
| 2058 | 17.22 | 13.34 | -3.87 | ---- | -0.11 | -0.01 | 0.10 |
| 2059 | 17.28 | 13.35 | -3.93 | ---- | -0.11 | -0.01 | 0.10 |
| 2060 | 17.34 | 13.35 | -3.99 | ---- | -0.11 | -0.01 | 0.10 |
| 2061 | 17.40 | 13.36 | -4.04 | ---- | -0.11 | -0.01 | 0.11 |
| 2062 | 17.45 | 13.36 | -4.09 | ---- | -0.12 | -0.01 | 0.11 |
| 2063 | 17.51 | 13.37 | -4.14 | ---- | -0.12 | -0.01 | 0.11 |
| 2064 | 17.56 | 13.37 | -4.19 | ---- | -0.12 | -0.01 | 0.11 |
| 2065 | 17.61 | 13.37 | -4.23 | ---- | -0.12 | -0.01 | 0.12 |
| 2066 | 17.66 | 13.38 | -4.28 | ---- | -0.13 | -0.01 | 0.12 |
| 2067 | 17.71 | 13.38 | -4.32 | ---- | -0.13 | -0.01 | 0.12 |
| 2068 | 17.76 | 13.39 | -4.37 | ---- | -0.13 | -0.01 | 0.12 |
| 2069 | 17.81 | 13.39 | -4.42 | ---- | -0.13 | -0.01 | 0.13 |
| 2070 | 17.87 | 13.39 | -4.47 | ---- | -0.14 | -0.01 | 0.13 |
| 2071 | 17.92 | 13.40 | -4.52 | ---- | -0.14 | -0.01 | 0.13 |
| 2072 | 17.97 | 13.40 | -4.57 | ---- | -0.14 | -0.01 | 0.13 |
| 2073 | 18.02 | 13.41 | -4.61 | ---- | -0.14 | -0.01 | 0.13 |
| 2074 | 18.07 | 13.41 | -4.66 | ---- | -0.14 | -0.01 | 0.14 |
| 2075 | 18.11 | 13.41 | -4.69 | ---- | -0.15 | -0.01 | 0.14 |
| 2076 | 18.14 | 13.42 | -4.72 | ---- | -0.15 | -0.01 | 0.14 |
| 2077 | 18.16 | 13.42 | -4.74 | ---- | -0.15 | -0.01 | 0.14 |
| 2078 | 18.17 | 13.42 | -4.75 | ---- | -0.15 | -0.01 | 0.14 |
| 2079 | 18.16 | 13.42 | -4.74 | ---- | -0.15 | -0.01 | 0.14 |
| 2080 | 18.14 | 13.42 | -4.73 | ---- | -0.16 | -0.01 | 0.15 |
| 2081 | 18.12 | 13.42 | -4.70 | ---- | -0.16 | -0.01 | 0.15 |
| 2082 | 18.09 | 13.42 | -4.67 | ---- | -0.16 | -0.01 | 0.15 |
| 2083 | 18.05 | 13.41 | -4.63 | ---- | -0.16 | -0.01 | 0.15 |
| 2084 | 18.00 | 13.41 | -4.59 | ---- | -0.16 | -0.01 | 0.15 |
| 2085 | 17.94 | 13.41 | -4.54 | ---- | -0.16 | -0.01 | 0.15 |
| 2086 | 17.88 | 13.40 | -4.48 | ---- | -0.16 | -0.01 | 0.15 |
| 2087 | 17.82 | 13.40 | -4.42 | ---- | -0.16 | -0.01 | 0.15 |
| 2088 | 17.75 | 13.40 | -4.36 | ---- | -0.16 | -0.01 | 0.15 |
| 2089 | 17.69 | 13.39 | -4.30 | ---- | -0.16 | -0.01 | 0.15 |
| 2090 | 17.63 | 13.39 | -4.24 | ---- | -0.16 | -0.01 | 0.15 |
| 2091 | 17.58 | 13.38 | -4.19 | ---- | -0.16 | -0.01 | 0.15 |
| 2092 | 17.54 | 13.38 | -4.16 | ---- | -0.16 | -0.01 | 0.15 |
| 2093 | 17.51 | 13.38 | -4.13 | ---- | -0.17 | -0.01 | 0.16 |
| 2094 | 17.49 | 13.38 | -4.11 | ---- | -0.17 | -0.01 | 0.16 |
| 2095 | 17.47 | 13.38 | -4.10 | ---- | -0.17 | -0.01 | 0.16 |
| 2096 | 17.47 | 13.38 | -4.09 | ---- | -0.17 | -0.01 | 0.16 |
| 2097 | 17.48 | 13.38 | -4.10 | ---- | -0.17 | -0.01 | 0.16 |

| Summarized Estimates: Proposal | | | | |
|---------------------------------------|-----------|-------------|-------------------|--|
| Year | Cost Rate | Income Rate | Actuarial Balance | Year of reserve depletion ¹ |
| 2022 | | | | |
| -2096 | 17.11% | 13.77% | -3.34% | 2035 |

| Summarized Estimates: Change from Current Law | | | |
|--|-----------|-------------|-------------------|
| Year | Cost Rate | Income Rate | Actuarial Balance |
| 2022 | | | |
| -2096 | -0.09% | -0.01% | 0.08% |

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