

Summary Measures and Graphs

Category of Change: Trust Fund Investment in Equities

Proposed Provision: Invest 40 percent of the Trust Funds in equities (phased in 2006-2020), assuming an ultimate 3 percent real rate of return on equities, the same as the assumed ultimate yield on the special-issue Social Security trust fund bonds

<u>Present Law</u>		<u>Change From Present Law in</u>		<u>Results with this provision</u>	
Long-Range Actuarial Balance	Annual Balance in 75th Year	Long-Range Actuarial Balance	Annual Balance in 75th Year	Long-Range Actuarial Balance	Annual Balance in 75th Year
-1.92%	-5.70%	0.00%	0.00%	-1.92%	-5.70%

