



WHO'S WHO IN SOCIAL SECURITY

February 2020





Contents

Who’s Who in Social Security – An Introduction	2
Social Security Administration	5
The United States Senate.....	8
The United States House of Representatives	13
Social Security Advisory Board.....	20
The Legislative Process	24
The Legislative Process (Cont’d)	25
“Think Tanks” Active in the Social Security Arena	26
Recent Proposals That Would Affect Trust Fund Solvency.....	49
The AMAC Social Security Guarantee	50
S. 3234 – Social Security Solvency and Sustainability Act.....	64
Further Reading on Social Security	66
Interesting Facts about Social Security	112
Appendix 1 – Former SSA Commissioners	115
Appendix 2 – Additional SSA Staff.....	116
Appendix 3 – Former Members of the SSAB	118
INDEX	123



Who's Who in Social Security

An Introduction

In 1935, the Social Security Act created a number of major programs intended to provide an economic foundation for America's families, from retirees to survivors, and from children to the disabled. Social Security is crucial to the well-being of more than 63 million beneficiaries, and will doubtless continue to be crucial for virtually every American in the future.

Over the past eight decades, the program has evolved to meet the changing needs of the country, and will undoubtedly continue to adjust along with the demographics of the American people. As we approach the 2020 presidential election cycle, it's clear that Social Security will again emerge at the forefront of political platforms as they unfold and as America's voters select their leadership for the years ahead.

The Old-Age and Survivors Insurance (OASI) Trust Fund, which pays retirement and survivors benefits, and the Disability Insurance (DI) Trust Fund, which pays disability benefits, are by law separate entities. These expenditures are a formidable portion of our country's economic picture.

Beyond the sheer size of the OASI and DI expenditure, however, is the even more staggering fact that the Trust Funds established to handle income and disbursements from Social Security are systematically moving toward exhaustion. After amassing a reserve balance of nearly \$3 trillion, financial demographics have created a situation where Social Security's outflow exceeds its inflow.

As announced by the Social Security Board of Trustees in April of 2019, "the combined asset reserves of the Old-Age and Survivors Insurance and Disability Insurance (OASI and DI) Trust Funds are projected to become depleted in 2035, one year later than projected

last year, with 80 percent of benefits payable at that time. The OASI Trust Fund is projected to become depleted in 2034, the same as last year’s estimate, with 77 percent of benefits payable at that time. The DI Trust Fund is estimated to become depleted in 2052, extended 20 years from last year’s estimate of 2032, with 91 percent of benefits still payable.”¹

The Time for Action is Now!

The long-term solvency of Social Security has been a steadily growing issue for some time and has reached the point where a harsh reality is in sight. The Association of Mature American Citizens (AMAC) has long been in the forefront of a fight to bring forth solutions to address this impending crisis, and has taken the initiative to advance a legislative framework to address the long-term problem. As an action-oriented and member-driven association, AMAC puts the well-being of its constituency at the top of its priority list, and has been resolute in its mission to get the attention of lawmakers to develop the least disruptive solution to the problem.

Make no mistake about it...time is running out. Now is the moment to take the steps that will ensure the stability of Social Security for future generations of Americans without subjecting workers to severe consequences. “Sooner rather than later” is the catchphrase that must govern...the funding shortfalls cannot be resolved without legislative intervention. This is not a self-correcting situation.

Tackling the Problem

It’s a big undertaking...we know that. And there are legions of people involved in meeting the challenge. From the Congressional Representatives we’ve elected to resolve issues like this to the Social Security Administration officials who manage the myriad complexities of the program, there are countless names and faces engaged in the process to save the program, just as there are diverse professionals laboring to create pathways to resolution. Like we said, it’s a big undertaking!

For this reason, we’ve created this “Who’s Who in Social Security” handbook for use as a guide in identifying the key players in the overall quest for a solution to Social Security’s dilemma. The material contained in this guide will serve to help point you to the people integral to the solution, and will serve to bring you up-to-speed on the many proposed resolutions currently in play.

¹ <https://www.ssa.gov/news/press/releases/2019/#4-2019-1>

Acknowledgements

This booklet is a product of the AMAC Foundation, AMAC's affiliated public benefit corporation. It's intent is to lend assistance in understanding and resolving the Social Security solvency crisis. AMAC's Founder and President, Dan Weber, initiated the creation of the first edition of the handbook in 2015, enlisting the help and support of key AMAC and AMAC Foundation contributors to bring it to fruition. As the 2020 election year unfolds, and as the insolvency endpoint grows closer and closer, it was decided to update the information in this compilation to reflect current assignments.

Additional copies of this publication can be obtained by contacting the AMAC Foundation office at 888-750-2622 or via email at info@AmacFoundation.org.

Social Security Administration

The Social Security Administration (SSA) is an independent agency of the U.S. federal government, with a mission to “Deliver Social Security services that meet the changing needs of the public.” With a staff of some 60,000 employees spread across more than 1,300 field offices and embassy locations around the world and an online presence through [socialsecurity.gov](https://www.socialsecurity.gov), the SSA is for many people the face of the federal government.

The Social Security Administration (SSA) came into being on July 16, 1946. Prior to this time, the Social Security program was administered by a three-person Social Security Board. The Board was abolished in a government reorganization and replaced by the SSA, with a single Commissioner as its head. For a complete list of the 30 Social Security Commissioners from 1946 through 2019, please refer to Appendix 1.

SSA’s headquarters is located in Woodlawn, Maryland. Much of the Administration’s detail claim work is performed at six large Program Service Centers located around the country. The six service centers are:

- Northeastern Program Service Center, Jamaica, Queens, New York (as of late 1980s; previously in Rego Park, Queens and College Point, Queens)
- Mid-Atlantic Program Service Center, Philadelphia, Pennsylvania
- Southeastern Program Service Center, Birmingham, Alabama
- Great Lakes Program Service Center, Chicago, Illinois
- Mid-America Program Service Center, Kansas City, Missouri
- Western Program Service Center, Richmond, California (as of mid-1970s; previously in San Francisco)

The current oversight and management of SSA is accomplished through a hierarchical structure as shown in the charts that follow in this handbook.

Social Security Administration

www.ssa.gov

@SocialSecurity

OASDI Trustees

Steven T. Mnuchin

@stevenmnuchin1

Secretary of the Treasury, and Managing Trustee of the Trust Funds

202-622-2000

Alex M. Azar II

@SecAzar

Secretary of Health and Human Services and Trustee

202-690-7000

Eugene Scalia

@SecGeneScalia

Secretary of Labor and Trustee

202-693-6000

Andrew M. Saul

Commissioner of Social Security Administration

410-965-3120

Office of the Commissioner		
Commissioner Andrew M. Saul (01-19 - 01-25) 410-965-3120		
Deputy Commissioner David F. Black 410-965-1234	Senior Advisor to the Commissioner Nancy A. Berryhill 410-965-1234	
Chief of Staff Stephanie J. Hall	Deputy Chief of Staff Nancy J. Gonzalez (Acting)	
Press Office Mark Hinkle, Acting Press Officer @SSAPress 410-929-4774		
Office of the Inspector General (OIG) @TheSSAOIG oig.ssa.gov		
Gail S. Ennis Inspector General (410) 965-2905	Steven L. Schaeffer Acting Deputy Inspector	Benjamin Alpert Acting Chief of Staff
Chief Actuary Office @TheSSAOIG ssa.gov/OACT		
Stephen C. Goss Chief Actuary (410) 965-3000	Deputy Chief Actuary Office of Short Range Estimates (Vacant)	Deputy Chief Actuary Office Long Range Estimates Karen P. Glenn (410) 965-3002

Additional members of SSA are shown in Appendix 2

The United States Senate

Section 3 of the United States Constitution dictates “The Senate of the United States shall be composed of two Senators from each State, *chosen by the Legislature thereof*, for six Years; and each Senator shall have one Vote.²” This approach gives equal representation to states regardless of population, and helps to preserve their individual sovereignty. Accordingly, the Senate consists of 100 members, elected by popular vote for six-year, staggered terms.

The Constitution sets three qualifications for service in the U.S. Senate: age (at least thirty years of age); U.S. citizenship (at least nine years); and residency in the state a senator represents at time of election. The details of these qualifications were hammered out by the Constitution's framers during the Constitutional Convention in 1787.

Since 1789, nearly 2,000 individuals have been a senator; of these, 16 have become U.S. presidents, 15 have served as Supreme Court Justices, five have been awarded the Nobel Peace Prize, and 28 have been awarded the Presidential Medal of Freedom.³

Listed in the following pages are those senate members having a direct relationship to legislative activities concerning Social Security.

² https://www.senate.gov/civics/constitution_item/constitution.htm?vm=r

³ https://www.senate.gov/senators/facts_milestones.htm

The Senate Finance Committee

www.finance.senate.gov



Chairman

Chuck Grassley (R – IA)

202-224-3744

www.grassley.senate.gov

@grassley

Chief of Staff: Aaron Cummings



Ranking Mbr./Ex Officio

Ron Wyden (D – OR)

202-224-5244

www.wyden.senate.gov

@senatorronwyden

Chief of Staff: Jeff Michels

Subcommittee on Social Security, Pensions, and Family Policy

This subcommittee examines specific areas and issues related to the Finance Committee's overall jurisdiction in the revenue area of Social Security.

Majority Members



Chairman

Rob Portman (R - OH)

202-224-3353

www.portman.senate.gov

@senrobportman

Chief of Staff: Kevin Smith



Bill Cassidy (R - LA)

202-224-5824

www.cassidy.senate.gov

@senbillcassidy

Chief of Staff: James Quinn



James Lankford (R-OK)
202-224-5754
www.lankford.senate.gov
@senatorlankford
Chief of Staff: Michelle Altman



Todd Young (R- IN)
202-224-5623
www.young.senate.gov
@SenToddYoung
Chief of Staff: John Connell

Minority Members



Ranking member
Sherrod Brown (D-OH)
202-224-2315
www.brown.senate.gov
@SenSherrodBrown
Chief of Staff: Sarah Benzing



Bob Casey Jr. (D-PA)
202-224-6324
www.casey.senate.gov
@SenBobCasey
Chief of Staff: Kristen Gentile



Michael Bennet (D - CO)
202-224-5852
www.bennet.senate.gov
@senatorbennet
Chief of Staff: Jonathan Davidson



Catherine Cortez Masto (D - NV)
202-224-3542
www.cortezmasto.senate.gov
@SenCortezMasto
Chief of Staff: Reynaldo Benitez

Remaining Members of The Senate Finance Committee

Majority Members

Richard Burr (R - NC)
202-224-3154
@SenatorRichardBurr
www.burr.senate.gov

Chief of Staff: Natasha Hickman

Steve Daines (R – MT)
202-224-2651
@SteveDainesMT
www.daines.senate.gov

Chief of Staff: Jason Thielman

Pat Roberts (R - KS)
202-224-4774
@SenPatRoberts
www.roberts.senate.gov
Chief of Staff: Jackie Cottrell

John Cornyn (R - TX)
202-224-2934
@SenJohnCornyn
www.cornyn.senate.gov
Chief of Staff: Beth Jafari

Michael B. Enzi (R - WY)
202-224-3424
@mikeenzi
www.enzi.senate.gov
Chief of Staff: Coy Knobel

Tim Scott (R – SC)
202-224-6121
@SenatorTimScott
www.scott.senate.gov
Chief of Staff: Jennifer DeCasper

Patrick J. Toomey (R - PA)
202-224-4254
@SenToomey
www.toomey.senate.gov
Chief of Staff: Daniel Brandt

Mike Crapo (R - ID)
202-224-6142
@MikeCrapo
www.crapo.senate.gov
Chief of Staff: John Hoehne

Ben Sasse (R-NE)
202-224-4224
@SenSasse
www.sasse.senate.gov
Chief of Staff: Raymond Sass

John Thune (R - SD)
202-224-2321
@SenJohnThune
www.thune.senate.gov
Chief of Staff: Nick Rossi

Minority Members

Maria Cantwell (D - WA)
202-224-3441
@senatorcantwell
www.cantwell.senate.gov
Chief of Staff: Jami Burgess

Maggie Hassan (D – NH)
202-224-3324
@SenatorHAssan
www.hassan.senate.gov
Chief of Staff: Marc Goldberg

Benjamin L. Cardin (D - MD)
202-224-4524
@SenatorCardin
www.cardin.senate.gov
Chief of Staff: Christopher Lynch

Robert Menendez (D - NJ)
202-224-4744
@senatormenendez
www.menendez.senate.gov
Chief of Staff: Fred Turner

Thomas R Carper (D - DE)
202-224-2441
@tomcarper
www.carper.senate.gov
Chief of Staff: Emily Spain

Debbie Stabenow (D - MI)
202-224-4822
@SenatorStabenow
www.stabenow.senate.gov
Chief of Staff: Matt VanKuiken

Remaining Members of The Senate Finance Committee

Minority Members (Cont'd)

Mark R. Warner (D - VA)

202-224-2023

@MarkRWarner

www.warner.senate.gov

Chief of Staff: Mike Harney

Sheldon Whitehouse (D - RI)

202-224-2921

@SenatorWhitehouse

www.whitehouse.senate.gov

Chief of Staff: Sam Goodstein

The United States House of Representatives

Section 2 of the United States Constitution dictates that membership in the House of Representatives is apportioned to the population of each state, with each state having at least one seat. The decennial congressional district reapportionment process that follows each official census ensures that this representation stays in balance within its membership ceiling of 435 Representatives. These representatives are elected biannually for two-year terms, with elections held in even-numbered years.

19 House of Representatives members have also served as president, and 17 House Members have served on the U.S. Supreme Court.⁴

With respect to legislative activity involving Social Security, the House has a specific responsibility as defined in the United States Constitution. Article I, Section 7 of the Constitution states that: “All bills for raising Revenue shall originate in the House of Representatives; but the Senate may propose or concur with Amendments as on other Bills.”⁵

Listed in the following pages are those House of Representatives members having a direct relationship to legislative activities concerning Social Security.

⁴ <https://history.house.gov/People/Other-Office/Member-President/>

⁵ <https://history.house.gov/Institution/Origins-Development/Power-of-the-Purse/>

The House Ways and Means Committee
www.waysandmeans.house.gov



Chairman

Richard E. Neal (D-MA)

202-225-5601

@RepRichardNeal

neal.house.gov

Chief of Staff: William Tranghese



Ranking Member

Kevin P. Brady (R – TX)

202-225-4901

@RepKevinBrady

kevinbrady.house.gov

Chief of Staff: Jeff Billman

Subcommittee on Social Security

The Subcommittee's jurisdiction includes legislation and issues related to Social Security's retirement, survivors and disability programs, the Railroad Retirement program, and employment taxes and trust fund operations relating to those programs, including title II of the Social Security Act, Chapter 22 of the Internal Revenue Code (the Railroad Retirement Tax Act), as well as provisions in title VII and title XI of the Act involving the Old Age and Survivors' and Disability Insurance (OASDI) programs.

**The House Ways and Means Committee
Subcommittee on Social Security
www.waysandmeans.house.gov**

Leadership



Chairman – John B. Larson (D-CT)
202-225-2265
@RepJohnLarson
larson.house.gov
Chief of Staff: Scott Stephanou



Ranking Member – Tom Reed (R-NY)
202-225-3161
@RepTomReed
reed.house.gov
Chief of Staff: Drew Wayne

Majority Members



Linda T. Sánchez (D-CA)
202-225-6676
@RepLindaSanchez
lindasanchez.house.gov
Chief of Staff: Marsha Espinosa



Daniel Kildee (D-MI)
202-225-3611
@RepDanKildee
dankildee.house.gov
Chief of Staff: Mitchell Rivard

**The House Ways and Means Committee
Subcommittee on Social Security
www.waysandmeans.house.gov**

Majority Members



Brendan Boyle (D-PA)
202-225-6111
@CongressmanBoyle
boyle.house.gov
Chief of Staff: John McCarthy



Bradley Schneider (D-IL)
202-225-4835
@RepSchneider
schneider.house.gov
Chief of Staff: Casey O'Shea



Brian Higgins (D-NY)
202-225-3306
@RepBrianHiggins
higgins.house.gov
Chief of Staff: Matthew Fery



Bill Pascrell Jr. (D - NJ)
202-225-5751
@BillPascrell
pascrell.house.gov
Chief of Staff: Ben Rich

**The House Ways and Means Committee
Subcommittee on Social Security
www.waysandmeans.house.gov**

Minority Members



Jodey Arrington (R – TX)
202-225-4005
@JodeyArrington
arrington.house.gov
Chief of Staff: John Porter



A. Drew Ferguson (R – GA)
202-225-5901
@RepDrewFerguson
ferguson.house.gov
Chief of Staff: Bobby Saporow

Ron Estes (R-KS)
202-225-6216
@RepRonEstes
estes.house.gov
Chief of Staff: Josh Bell



Remaining Members of the House Ways and Means Committee

Majority Members

Don Beyer (D – VA)
202-225-4376
@RepDonBeyer
www.beyer.house.gov
Chief of Staff: Tanya Bradsher

Earl Blumenauer (D - OR)
202-225-4811
@repblumenauer
www.blumenauer.house.gov
Chief of Staff: Willie Smith

Judy Chu (D - CA)
202-225-5464
@RepJudyChu
www.chu.house.gov
Chief of Staff: Sonali Desai

Danny Davis (D - IL)
202-225-5006
@RepDannyDavis
www.davis.house.gov
Chief of Staff: Yul Edwards

Suzan DelBene (D - WA)
202-225-6311
@RepDelBene
www.delbene.house.gov
Chief of Staff: Aaron Schmidt

Lloyd Doggett (D - TX)
202-225-4865
@RepLloydDoggett
www.doggett.house.gov
Chief of Staff: Michael Mucchetti

Dwight Evans (D - PA)
202-225-4001
@RepDwightEvanx
www.evans.house.gov
Chief of Staff: Kim Turner-Dixon

Jimmy Gomez (D - CA)
202-225-6235
@RepJimmyGomez
www.gomez.house.gov
Chief of Staff: Bertha Alisia Guerrero

Steven Horsford (D - NV)
202-225-9894
@RepHorsford
www.horsford.house.gov
Chief of Staff: Asha Jones

Ron Kind (D – WI)
202-225-5506
@repronkind
www.kind.house.gov
Chief of Staff: Hana Greenberg

John Lewis (D - GA)
202-225-3801
@RepJohnLewis
www.johnlewis.house.gov
Chief of Staff: Michael Collins

Gwen Moore (D - WI)
202-225-4572
@GwenSMoore
www.gwenmoore.house.gov
Chief of Staff: Sean Gard

Stephanie Murphy (D - FL)
202-225-4035
@RepStephMurphy
www.murphy.house.gov
Chief of Staff: Brad Howard

Jimmy Panetta (D - CA)
202-225-2861
@RepJimmyPanetta
www.panetta.house.gov
Chief of Staff: Joel Bailey

Terri Sewell (D - AL)
202-225-2665
@RepSewell
www.sewell.house.gov
Chief of Staff: Cachavious English

Tom Suozzi (D - NY)
202-225-3335
@RepTomSuozzi
www.suozzi.house.gov
Chief of Staff: Mike Florio

Mike Thompson (D - CA)
202-225-3311
@RepMikeThompson
www.mikethompson.house.gov
Chief of Staff: Melanie Rhinehart Van Tassell

Remaining Members of the House Ways and Means Committee

Minority Members

Vern Buchanan (R – FL)

202-225-5015

@CongressmanBuchanan

www.buchanan.house.gov

**Chief of Staff: Dave
Karvelas**

George Holding (R – NC)

202-225-3032

@CongressmanGeorgeHolding

www.holding.house.gov

Chief of Staff: Katie Smith

Mike Kelly (R - PA)

202-225-5406

@MikeKellyPA

www.kelly.house.gov

**Chief of Staff: Matthew
Stroia**

Darin LaHood (R - IL)

202-225-6201

@replahood

www.lahood.house.gov

Chief of Staff: Steven Pfrang

Kenny Marchant (R - TX)

202-225-6605

@RepKennyMarchant

www.marchant.house.gov

Chief of Staff: Brian Thomas

Devin Nunes (R - CA)

202-225-2523

@RepDevinNunes

www.nunes.house.gov

Chief of Staff: Jilian Plank

Tom Rice (R - SC)

202-225-9895

@RepTomRice

www.rice.house.gov

**Chief of Staff: Jennifer
Watson**

David Schweikert (R - AZ)

202-225-2190

@RepDavid

www.schweikert.house.gov

**Chief of Staff: Katherina
Dimenstein**

Adrian Smith (R - NE)

202-225-6435

@RepAdrianSmith

www.adriansmith.house.gov

**Chief of Staff: Monica
Didiuk**

Jason Smith (R - MO)

202-225-4404

@RepJasonSmith

www.jasonsmith.house.gov

Chief of Staff: Mark Roman

Jackie Walorski (R - IN)

202-225-3915

@RepWalorski

www.walorski.house.gov

Chief of Staff: Mike Dankler

Brad Wenstrup (R - OH)

202-225-3164

@RepBradWenstrup

www.wenstrup.house.gov

Chief of Staff: Greg Brooks

Social Security Advisory Board

Current Members

The Social Security Advisory Board (SSAB) is a bipartisan, independent federal government agency established in 1994 to advise the President, the Congress, and the Commissioner of Social Security on matters of policy and administration of the Old-Age, Survivors, and Disability Insurance and the Supplemental Security Income programs. The Board has seven members, appointed by the President, Senate and House of Representatives. All SSAB members are appointed for six-year terms (staggered), and all are subject to Senate confirmation. The SSAB meets at least six times each year.

Functions of the Board

- Analyzing the Nation's retirement and disability systems and making recommendations with respect to how the old-age, survivors, and disability insurance program and the supplemental security income program, supported by other public and private systems, can most effectively assure economic security.
- Studying and making recommendations relating to the coordination of programs that provide health security with social security programs.
- Making recommendations to the President and to the Congress with respect to policies that will ensure the solvency of the old-age, survivors, and disability insurance program, both in the short-term and the long-term.
- Making recommendations with respect to the quality of service that the Administration provides to the public.
- Making recommendations with respect to policies and regulations regarding the old-age, survivors, and disability insurance program and the supplemental security income program.
- Increasing public understanding of the social security system.
- Making recommendations with respect to a long-range research and program evaluation plan for the Administration.
- Reviewing and assessing any major studies of social security as may come to the attention of the Board.
- Making recommendations with respect to such other matters as the Board determines to be appropriate.

Social Security Advisory Board Current Members
Current Members
@ssabgov



Henry J. Aaron

9/14 - 9/20

Nominated February 14, 2011 and confirmed September 8, 2014 (first term). Re-nominated January 6, 2014 and confirmed September 8, 2014 (second term). Senior Fellow in the Brookings Institution Economic Studies Program, which he directed from 1990 through 1996. Founding member, VP and board chair of the National Academy of Social Insurance. PhD in economics from Harvard University. Current term of office: September 2014 to September 2020.

Nancy J. Altman

10/17 – 9/23

Appointed by the House on September 26, 2017. She is President of Social Security Works and Chair of the Strengthen Social Security coalition. Author of several books on Social Security and chairs the Board of Directors of the Pension Rights Center and is a member of the Board of Directors of the Alliance for Retired Americans Educational Fund and the Economic Opportunity Institute. J.D. from the University of Pennsylvania Law School.





Jagadeesh Gokhale

11/09 - 9/21

Appointed 11/19/2009 (first term); Reappointed 10/5/2015 (Second term). Dr. Jagadeesh Gokhale is the Director of Special Projects at Penn Wharton Public Policy Initiative (Penn Wharton PPI). Senior fellow at the Cato Institute. Earlier he worked at the American Enterprise Institute as a visiting scholar. Main research fields are macro and public economics with a special focus on the effects of fiscal policy on future generations.

Kim Hildred, Chair

9/16 – 9/22

Appointed 9/27/2016. Currently serves as President of Hildred Consulting LLC. Ms. Hildred retired from the U.S House of Representatives after serving 17 years as Staff Director of the Committee on Ways and Means Subcommittee on Social Security. Master of Science in Education degree from Duquesne University.



Robert Joondeph

10/18 – 9/24



Appointed 10/1/2018. Served as the Executive Director of Disability Rights Oregon (DRO) for over 30 years. Served as a member of the Health Evidence Review Commission, Health Services Commission, Health Fund Board, Mental Health Planning and Management Advisory Council, State Rehabilitation Commission, Governor’s Task Force on Brain Injury and the Council on Developmental Disabilities. Is a graduate of Case Western Reserve Law School and Brown University.

Current Nominees to the Board



During the 116th Congress, the president nominated **Jason J. Fichtner, PhD** to be a Member of the Social Security Advisory Board for a six-year term expiring September 30, 2024. Fichtner is a former Senior Research Fellow at the Mercatus Center at George Mason University. His research focuses on Social Security, federal tax policy, federal budget policy, retirement security, and policy proposals to increase saving and investment. Previously, he served in several positions at the Social Security Administration, including as deputy commissioner of Social Security (acting), chief economist, and associate commissioner for retirement policy. He also served as senior economist with the Joint Economic Committee of the US Congress.

Former Members of the Social Security Advisory Board are shown in Appendix 3

The Legislative Process

The primary duty of Congress is to administer the legislative process and, through this process, enact the laws that govern the country. To accomplish this, Congress annually considers thousands of individual bills via this process which, while somewhat complex, can be traced chronologically through these stages:

Step 1 – The Introduction

All bills must be sponsored and introduced by a member of Congress, although they can originate from a variety of sources.

Step 2 – Committee Referral

Once introduced, the bill is referred to the appropriate committee (in some cases, multiple committees) for study and assessment.

Step 3 – Subcommittee Review

Once assigned to a focused subcommittee, the bill is researched extensively and, where appropriate, subjected to public hearings.

Step 4 – Mark-up

Using the results of research and hearings, the bill is “marked-up” with changes and amendments and sent back to the referring committee.

Step 5 – Committee Action

Depending on the information provided by subcommittee, the referring committee may elect to take no action (letting the bill die) or vote on whether the bill will be ordered for reporting to the House or Senate. A committee report outlining the bill’s provisions and the committee’s position on it usually accompanies the bill.

Step 6 – Chamber Debate

Having survived committee review, the bill is next scheduled for debate on the chamber floor. At this stage, the bill can be either passed or defeated. If passed, the bill is now considered an “act.”

Step 7 – Chamber Exchange

If the bill is passed by the House, it is then referred to the Senate for analysis and debate. If passed in step 6 by the Senate, it is similarly referred to the House. If the chamber receiving the bill is already considering a similar bill, the

The Legislative Process (Cont'd)

additional analysis and debate is generally waived. In any event, the receiving chamber may at this point approve, reject, ignore, or modify the bill.

Step 8 – Bicameral Determination

If, after both chambers have debated the bill, there are substantial differences between the House and Senate versions, a bicameral conference committee is assigned responsibility for achieving reconciliation. The results are provided to both the House and the Senate for approval (both must approve an identical version of the bill). If there is no agreement at this point, the bill dies.

Step 9 – Presidential Review

The jointly approved bill is now sent to the president, becoming law if it is signed. The president may allow the bill to sit unsigned for a 10-day period, which allows it to become law if Congress is in session during the period. If Congress adjourns during the 10-day unsigned period, the bill also dies (this is referred to as a “pocket veto”). The president may also veto the bill at this point and return it to Congress for further analysis and re-submission.

Step 10 – Veto Override

If the president vetoes the bill, either directly or via a pocket veto, the rejection can be overridden by Congress by re-voting. To become law after a veto, a bill must receive affirmative votes from a two-thirds majority in both chambers.

“Think Tanks” Active in the Social Security Arena

Subjects with the magnitude and breadth of Social Security require extensive, continual, and focused research on an extremely wide range of topics to ensure that all viewpoints and perspectives are given due consideration in the formulation of policy. Accordingly, a number of research institutes have evolved over the years in which highly informed professionals delve into background issues on major subjects and craft thoroughly examined positions that policy makers often consider in laying out courses of action.

In the area of Social Security, there are several major, relevant organizations that perform this service for the general public. Their material is made available to interested parties as support for the decision-making process, as advocacy support for internal and external policy-making participants, and as general reference material for other researchers and members of the public seeking to fully understand Social Security at a greater depth.

This section identifies several notable research organizations that have some level of focus on Social Security, provides contact information for these organizations, summarizes the organizations’ scope or mission, and identifies the key players in each of the organizations relative to Social Security research. Biographical highlights on these individuals are included.

Please note that our compilation of key individuals in these organizations may have inadvertently omitted names of significant participants involved in Social Security matters. If so, please contact the Amac Foundation at info@amacfoundation.org to have their information added for future editions.

The American Action Forum

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AAF is a center-right, independent, nonprofit 501(c)(3) institute that provides actionable research and analysis on public policy such as debt, healthcare, taxes, immigration, etc. Its goals are to “inject forward-thinking ideas into the public debate that will build a better economic future, promoting innovative, free market solutions to build a stronger, more prosperous future.

Douglas Holtz-Eakin,

President

Twitter: @djheakin

- Founder of AAF in 2009
- Chief Economist of the President’s Council of Economic Advisers (CEA)
- Former Director of the non-partisan Congressional Budget Office (CBO)
- Director of Domestic and Economic Policy for the John McCain presidential campaign.
- Commissioner Financial Crisis Inquiry Commission
- Writes a daily column in AAF’s morning newsletter, the Daily Dish, and regularly comments on current policy and political debates for a variety of news outlets

Gordon Gray

Director of Fiscal Policy

Twitter: @GordonGrayDC

- Expertise in Economy and Budget
- Senior Policy Advisor and Policy Director for Senator Rob Portman
- Deputy Director of Domestic and Economic Policy for Senator John McCain
- Several years with American Enterprise Institute

The American Enterprise Institute

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AEI scholars are committed to making the intellectual, moral, and practical case for expanding freedom, increasing individual opportunity, and strengthening the free enterprise system in America and around the world. AEI's work explores ideas that further these goals, and AEI scholars take part in this pursuit with academic freedom. AEI operates independently of any political party and has no institutional positions. AEI scholars' conclusions are fueled by rigorous, data-driven research and broad-ranging evidence.

Joseph Antos

The Wilson H. Taylor
Scholar in Health Care and
Retirement Policy
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- Focuses on the economics of health policy, including Medicare, single-payer health insurance proposals, the uninsured, the Affordable Care Act, and the overall reform of the health care system.

Andrew G. Biggs

Resident Scholar
Andrew.biggs@aei.org
@biggsag

- Research focus: Social Security reform; State and local government pensions; public and private sector compensation
- In 2013, appointed Co-Vice Chair by the Society of Actuaries of a blue ribbon panel tasked with analyzing the causes of underfunding in public pension plans and how govts. can securely fund plans in the future
- Other previous positions: Principal Deputy Commissioner at the SSA; Deputy Commissioner for policy at the SSA; Assoc Commissioner for Retirement Policy at SSA; Assoc Director, National Economic Council, White House; Social Security Analyst at Cato Institute; Staff Member of the President's Campaign to Strengthen Social Security in 2001; Director of Research at the Congressional Institute

The American Enterprise Institute (cont'd)

<p>Alex Brill Resident Fellow Alex.brill@aei.org @AlexBrill_DC</p>	<ul style="list-style-type: none"> • Studies the impact of tax policy on the U.S. economy as well as the fiscal, economic, and political consequences of tax, budget, health care, retirement security issues, and trade policies • Also works on health care reform, pharmaceutical spending and drug innovation, and unemployment insurance reform • Has testified before congress numerous times on tax policy, labor markets and unemployment insurance, Social Security reform, fiscal stimulus, the manufacturing sector, and biologic drug competition • Previously served as: Policy Director and Chief Economist of the House Ways and Means Committee, White House Council of Economic Advisers, President’s Fiscal Commission, and Republican Platform Committee
<p>Arthur C. Brooks President Emeritus Arthur@authorbrooks.com @arthurbrooks</p>	<ul style="list-style-type: none"> • Former AEI president (2009-2019) • Also served as the Beth and Ravenel Curry Scholar in Free Enterprise • Main research: culture, politics, economic life in America, Social Entrepreneurship, philanthropy, and free enterprise • Authored books and articles on role of government, fairness, economic opportunity, happiness, and the morality of free enterprise • Frequent guest on national television and radio talk shows • PhD and Master’s in Philosophy in Policy Analysis
<p>James C. Capretta Resident Fellow jcapretta@aei.org</p>	<ul style="list-style-type: none"> • Milton Friedman Chair • Main research: health care, entitlement, and U.S. budget policy; as well as global trends in aging, health, and retirement programs • Senior Advisor to the Bipartisan Policy Center • Advisory Board member – National Institute for Health Care Management Fdn. • Former associate director-Office of Management and Budget • Former health policy analyst-US Senate Budget Committee and House Committee on Ways and Means • Former senior fellow-Ethics & Public Policy Center

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The Bipartisan Policy Center actively fosters bipartisanship by combining the best ideas from both parties to promote health, security, and opportunity for all Americans. Our policy solutions are the product of informed deliberations by former elected and appointed officials, business and labor leaders, and academics and advocates who represent both sides of the political spectrum. BPC focuses on health, campus free expression, energy, immigration, education infrastructure, governance, and economy.

Shai Akabas

Director of Economic Policy
@ShaiAkabas

- Assisted Governor Jerome Powell in his work on the Federal Debt Limit in 2011
- Researched: economic policy, federal budget, retirement security, and higher education financing
- Previously worked as Satellite Office Director on NYC Mayor Bloomberg’s 2009 campaign for re-election
- Steered BPC’s Commission on Retirement Security and Personal Savings

Kent Conrad

Senior Fellow
Co-Chair of BPC’s Commission on Retirement Security and Personal Savings

- As a former senator from North Dakota, he was chairman of the Senate Budget Committee. He was the father of the National Commission on Fiscal Responsibility and Reform (Simpson-Bowles) and a key author of the Affordable Care Act. He is currently a part of the Campaign to Fix the Debt. A self-described deficit hawk, also served on the Gang of Six, a bipartisan group of senators that proposed solutions to the U.S. debt challenge.

James H. Douglas

Member of BPC’s Governors’ Council; Retirement and Personal Savings

- Former Governor of Vermont
- Also served as chair of the National Governors Association, the President of the Council of State Governments, chairman of the New England Governors’ Conference and the Coalition of Northeastern Governors

Bipartisan Policy Center (cont'd)

<p>Ben Gitis Senior Policy Analyst @BenGitis</p>	<ul style="list-style-type: none"> • Senior policy analyst for BPC's Economic Policy Project • Former deputy policy director on Howard Schultz's potential campaign For President of the United States
<p>G. William Hoagland Senior Vice President @billhoagland</p>	<ul style="list-style-type: none"> • Helps direct and manage fiscal, health, and economic policy analyses for BPC • Previously served as: CIGNA Corporation's VP of Public Policy, staff member of the U.S. Senate Budget Committee, Administrator of the Department of Agriculture's Food and Nutrition Service, and Special Assistant to the Secretary of Agriculture • Affiliate professor of Public Policy at the George Mason University • Board Member of the Committee for a Responsible Federal Budget, the National Academy of Social Insurance, and the National Advisory Committee to the Workplace Flexibility Commission
<p>James B. Lockhart III, Senior Fellow Co-Chair of BPC'S Commission on Retirement Security and Personal Savings</p>	<ul style="list-style-type: none"> • Lockhart was the director of the Federal Housing Finance Agency. He served as the chairman of Federal Housing Finance Oversight Board and a member of the Financial Stability Oversight Board. • Held the position as the deputy commissioner and chief operating office of the Social Security Administration, secretary to its board of trustees and a member of President George W. Bush's management council. Also served in the previous Bush administration as executive director of the Pension Benefit Guaranty Corporation.

Bipartisan Policy Center (cont'd)

<p>John Soroushian Associate Director jsoroushian@bipartisanpolicy.org</p>	<ul style="list-style-type: none"> • Associate Director on BPC's Corporate Governance and Finance Project • Formerly served at the Treasury Department • Formerly served at the Federal Reserve • Formerly affiliated with Brookings Institution
<p>Meron Yohannes Policy Analyst myohannes@bipartisanpolicy.org</p>	<ul style="list-style-type: none"> • Policy Analyst for BPC's Economic Policy Project • Former Research Assistant at VCU's Center of Public Policy

Brookings Institution

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The Brookings Institution is a nonprofit public policy organization based in Washington, DC. Our mission is to conduct in-depth research that leads to new ideas for solving problems facing society at the local, national and global level. Research topics cover foreign policy, economics, development, governance and metropolitan policy.

<p>Henry J. Aaron, Senior Fellow, Economic Studies</p>	<ul style="list-style-type: none"> • Member and vice-chair of the District of Columbia Health Benefits Exchange and former chair of the Social Security Advisory Board • Served as Director of Economic Studies from 1990-1996 • Member of Social Security Advisory Board • Bruce and Virginia MacLaury Chair
<p>Barry P. Bosworth Senior Fellow, Economic Studies</p>	<ul style="list-style-type: none"> • Former presidential advisor • His Research has involved work on the determinants of economic growth in developing countries, saving, capital formation, and productivity growth

Brookings Institution (cont'd)

<p>William G. Gale Co-Director, Urban-Brookings Tax Policy Center and Director, Retirement Security Project Senior Fellow – Economic Studies @WilliamGale2</p>	<ul style="list-style-type: none"> • Expert on tax policy, fiscal issues, pensions, and saving behavior • Currently serves as President of the National Tax Association • Arjay and Frances Fearing Miller Chair in Federal Economic Policy • Co-Director – Urban-Brookings Tax Policy Center
<p>J. Mark Iwry Nonresident Senior Fellow-Economic Studies</p>	<ul style="list-style-type: none"> • Created the Saver’s Credit that helped to reform the 401(k) and IRA systems • He also is a Visiting Scholar at the Wharton School of the University of Pennsylvania. He served from 2009 to January 2017 as Senior Advisor to the Secretary of the Treasury and concurrently as Treasury’s Deputy Assistant Secretary for Retirement and Health Policy
<p>David C. John Deputy Director, Retirement Security Project Nonresident Senior Fellow-Economic Studies @dcjretiresecure</p>	<ul style="list-style-type: none"> • Focuses on improving retirement savings and income in the United States, especially among moderate and low income workers. • Senior Strategic Policy Advisor with AARP’s Public Policy Institute • Previously a Senior Research Fellow with the Thomas A. Roe Institute for Economic Policy Studies at the Heritage Foundation

Cato Institute

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The Cato Institute is a public policy research organization dedicated to the principles of individual liberty, limited government, free markets, and peace. Its scholars and analysts conduct independent, nonpartisan research on a wide range of policy issues. Our vision is to create free, open, and civil societies founded on libertarian principles.

Michael Cannon

Director of Health

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- He has been described as "an influential health-care wonk"
- He has appeared on all the major news outlets and his articles have been featured in all major newspapers and journals
- Coeditor of Replacing Obamacare: The Cato Institute on Health Care Reform and coauthor of Healthy Competition: What's Holding Back Health Care and How to Free It.
- Previously, he served as a domestic policy analyst for the U.S. Senate Republican Policy Committee, where he advised the Senate leadership on health, education, labor, welfare, and the Second Amendment.

Michael D. Tanner

Senior Fellow

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- Heads research into a variety of domestic policies, with an emphasis on poverty and social welfare policy, health care, and Social Security and entitlement reform.
- Writer and speaker
- Featured in most influential newspapers
- Regularly appears on many network and cable news outlets

José Piñera

Senior Fellow

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- Co-Chairman of Project on Social Security Choice
- Founder/President of the International Center for Pension Reform
- Formerly Chile's secretary of labor and social security, he was the architect of the country's successful reform of its pension system

Center for Economic and Policy Research

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The Center for Economic and Policy Research (CEPR) promotes democratic debate on the most important economic and social issues that affect people's lives. CEPR is committed to presenting issues in an accurate and understandable manner, so that the public is better informed.

Dean Baker, PhD

Co-Director/Founder

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- CoFounder CEPR
- His areas of research include housing and macroeconomics, intellectual property, Social Security, Medicare and European labor markets.

David Rosnick

Economist

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- PhD in computer science and Master's in economics
- Created 'calculators' that compare current Social Security benefits to the Bush Plan based on "Progressive Indexing"

Center on Budget and Policy Priorities

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We are a nonpartisan research and policy institute. We pursue federal and state policies designed both to reduce poverty and inequality and to restore fiscal responsibility in equitable and effective ways. We apply our deep expertise in budget and tax issues and in programs and policies that help low-income people, in order to help inform debates and achieve better policy outcomes.

Paul N. Van de Water
Senior Fellow
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- Specializes in Medicare, Social Security, and health coverage issues
- Previously Vice President at the National Academy of Social Insurance and Assistant Deputy Commissioner for Policy at the Social Security Administration
- PhD in economics

Kathleen Romig
Senior Policy Analyst

- Works on Social Security, Supplemental Security Income, and other budget issues.
- Formerly with Social Security Administration, Social Security Advisory Board, and Congressional Research Service

Employee Benefit Research Institute

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The EBRI looks to contribute to, encourage, and enhance the development of employee benefit programs. They were founded in 1978 in order to conduct research as an education foundation for the private, government, and public sectors.

Craig Copeland, PhD
Senior Research Associate
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- Director of EBRI’s Social Security Reform Evaluation Research Program
- Previously taught economics at Southern Illinois University-Carbondale
- Former researcher in health care, specifically Medicare reform, quality in health care, and lengths of uninsured spells

Jack VanDerhei, PhD
Research Director
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- Major areas of research include financial aspects of private defined benefit and defined contribution retirement plans
- Editor of Benefits Quarterly
- Editor of Search for a National Retirement Income Policy (UP Press)
- Member-Advisory Board of the Pension Research Council (Wharton)
- Editorial board member-Journal of Retirement

The Heritage Foundation

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David R. Burton
Senior Fellow, Economic Policy

- Member-Roe Institute for Economic Policy Studies
- Member-Institute for Economic Freedom and Opportunity
- Focuses on tax matters, securities law, entrepreneurship, financial privacy and regulatory and administrative law issues
- Was General Counsel at the National Small Business Association and Chief Financial Officer and General Counsel at Alliance for Retirement Prosperity

Romina Boccia
Research Fellow and Research Manager
@RominaBoccia

- Director-Grover M. Hermann Center for the Federal Budget
- Leading fiscal and economic expert
- Expert on Social Security and Retirement Security
- Focuses on securing economic freedom, controlling the size and scope of government, expanding opportunity and flexibility for workers, reforming Social Security and simplifying retirement savings
- Previously served as Assistant Director of the Roe Institute, Policy Analyst at the Independent Women’s Forum, and interned at the Cato Institute’s Center for Trade Policy Studies

The Hoover Institution

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The Hoover Institution supports the Constitution of the United States, its Bill of Rights and its method of representative government. The principles of individual, economic, and political freedom; private enterprise; and representative government were fundamental to the vision of the Institution's founder. By collecting knowledge, generating ideas, and disseminating both, the Institution seeks to secure and safeguard peace, improve the human condition, and limit government intrusion into the lives of individuals.

Charles Blahous

Visiting Research Fellow

- Specializes in economic policy, including: retirement security, entitlements, and health care reform
- Previously: Executive Director of the President's Commission to Strengthen Social Security, and leader of the Alliance for Worker Retirement Security
- Served as public trustee for Social Security and Medicare programs (2010-2015)

Lanhee J. Chen

Research Fellow
@lanheechen

- Focuses on health policy and retirement security policy
- He is also a Senior Adviser to and member of the Aspen Economic Strategy Group at the Aspen Institute
- From 2014 to 2018, Chen served as a presidentially-appointed and Senate-confirmed member of the Social Security Advisory Board
- He was a senior official at the U.S. Department of Health and Human Services, a member of the Advisory Board of the Partnership for the Future of Medicare, and a member of the Council of Scholars for the Better Medicare Alliance.
- David and Diane Steffy Fellow in American Public Policy Studies

John F. Cogan

Senior Fellow

- Expert in domestic policy, focuses on: U.S. budget, Social Security, and health care
- Previously: Assistant Secretary for policy in the U.S. Department of Labor, Associate Director in the U.S. Office of Management and Budget, served on the Commission to Strengthen Social Security, served on the U.S. Bipartisan Commission on Health Care, the Social Security Notch Commission, and the National Academy of Sciences' Panel on Poverty and Family Assistance
- Leonard and Shirley Ely Senior Fellow
- Won The Hayek Prize (2018)

The Hoover Institution (cont'd)

<p>Thomas E. MaCurdy Senior Fellow</p>	<ul style="list-style-type: none"> • Expertise covers domestic policy related to government income support and entitlement programs • Professor of Economics, Standard University • Senior Fellow at the Stanford Institute of Economic Policy Research and a Research Associate of the National Bureau of Economic Research • Published numerous articles and reports analyzing policies in the area of welfare, food stamps, child support, foster care, low-skilled training, earned income tax credit, minimum wages, unemployment compensation, Social Security, Medicare, and Medicaid • His studies address a broad range of issues, including determinants of participation rates, characteristics of beneficiaries, sources and distributions of program costs, and influences on work disincentives and incomes.
<p>Thomas Church Research Fellow</p>	<ul style="list-style-type: none"> • He studies entitlement reform, health care policy, income inequality, poverty, the federal budget, and immigration reform. • He edited the book <i>Inequality & Economic Policy: Essays in Memory of Gary Becker</i> with John B. Taylor and Chris Miller.

The Independent Institute

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Burton A. Abrams,
PhD
Research Fellow

- Director-MyGovCost.org
- Author of several books and articles on economics
- Professor Emeritus of Economics-University of Delaware

John C. Goodman,
PhD
Senior Fellow
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- President-Goodman Institute for Public Policy Research
- Authored A Better Choice: Health Care Solutions for America and Priceless: Curing the Health Care Crisis
- Has done studies and testified before congress on the topics of health care reform, retirement reform, and tax issues
- Previously President and Senior Fellow in Health Care at the National Center for Policy Analysis
- Considered the Father of Health Savings Accounts (Wall Street Journal)
- Regularly appears on Fox News, CNN, PBS, Fox Business Network, and CNBC

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IPI is a non-profit, non-partisan public policy "think tank" based in Irving, Texas to research, develop and promote innovative and non-partisan solutions to today's public policy problems. IPI's focus is on approaches to the strengths of individual liberty, limited government, and free markets. IPI emphasizes getting its studies into the hands of the press and policy makers so that the ideas they contain can be applied to the challenges facing us today.

Tom Giovanetti

President

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- Focuses on tax reform, intellectual property, Social Security, communications policy, internet governance, education reform, and government spending
- Regularly appears on TV and radio and is published in the Wall Street Journal, Washington Times, Investor's Business Daily, and The Dallas Morning News

Merrill Matthews, PhD

Resident Scholar

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- Health policy expert
- Serves on the Texas Advisory Committee of the U.S. Commission on Civil Rights
- Past President of the Health Economics Roundtable for the National Association for Business Economics

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The mission is to develop and disseminate new ideas that foster greater economic choice and individual responsibility. The Institute serves as a leading voice of free-market ideas, welfare reform, tort reform, proactive policing, and supply-side tax policies.

<p>Steven Malanga Senior Fellow</p>	<ul style="list-style-type: none">• He writes about the intersection of urban economies, business communities, and public policy• George M. Yeager Fellow• Senior Editor-City Journal
<p>E. J. McMahon Adjunct Fellow @EjmEj</p>	<ul style="list-style-type: none">• Research Director of the Empire Center for Public Policy, Inc.• His writing encourages policy changes to promote economic growth at the regional, state, and local level. Recent work focuses on New York’s unsustainable public pension and retiree health care costs
<p>Brian Riedl Senior Fellow @Brian_Riedl</p>	<ul style="list-style-type: none">• Member-Economics21• Former Chief Economist for Sen. Rob Portman (R-OH)• Former Staff Director- Senate Finance Committee on Fiscal Responsibility and Economic Growth• Former Director of Budget and Spending Policy for Marco Rubio (R-FL) presidential campaign• Lead Architect-ten-year deficit reduction plan for Mitt Romney (R-UT) presidential campaign

The Mercatus Center

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Charles Blahous

Senior Research Strategist
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- Public Trustee for the Social Security and Medicare Programs (2010-2015)
- Specializes in economic policy, including retirement security, entitlements, and health care reform
- Previously: Executive Director of the President’s Commission to Strengthen Social Security
- Author of “Social Security: The Unfinished Work,” and “Pension Wise: Confronting Employer Pension Underfunding and Sparing the Taxpayers the Next Bailout
- Author: “The Costs of a National Single-Payer Healthcare System” and The Fiscal Consequences of the Affordable Care Act”
- J. Fish and Lillian F. Smith Chair

Eileen Norcross

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- Specializes in fiscal federalism, state and local government finance, pensions, public administration, and economic development
- Testified before congress on state and local pension underfunding
- Vice President of Policy Research

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The Progressive Policy Institute is a catalyst for policy innovation and political reform based in Washington, D.C. PPI is developing fresh proposals for stimulating U.S. economic innovation and growth, equipping all Americans with the skills and assets that social mobility in the knowledge economy requires, modernizing an overly bureaucratic and centralized public sector, and defending liberal democracy in a dangerous world.

Will Marshall President/Founder	<ul style="list-style-type: none">• One of the chief intellectual architects of the movement to modernize progressive politics for the global age.• Honorary Vice-President of Policy Network, an international think tank• Helped to found the Democratic Leadership Council, serving as its first policy director.• Currently serves on the board of directors for the National Endowment for Democracy.
Lindsay Mark Lewis Executive Director	<ul style="list-style-type: none">• Focuses on building policy dialogues with Mayors, Governors, House and Senate Members, the Administration and expanding the PPI reach into International policy and idea connections.• Former National Finance Director of the Democratic National Committee
Michael Mandel Chief Economic Strategist	<ul style="list-style-type: none">• Supervises PPI's research and policy work across a wide range of topics, including the data-driven economy, the impact of regulation on innovation, and policies to improve production, investment and job growth in the United States and globally.• Senior fellow at Wharton's Mack Institute for Innovation Management at the University of Pennsylvania
Ben Ritz Director of the Center for Funding America's Future	<ul style="list-style-type: none">• PPI's Center for Funding America's Future, which develops policy proposals to strengthen public investments in the foundation of our economy, modernize federal health and retirement programs to reflect an aging society, and transform our tax code to reward work over wealth.• Formerly staffed the Bipartisan Policy Center's Commission on Retirement Security and Personal Savings, where he helped develop its proposed reforms to Social Security and retirement-related tax expenditures.

The RAND Corporation

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Phillip Armour, PhD

Economist

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- Professor-Pardee RAND Graduate School
- Researches Disability Insurance and Social Security
- An empirical labor economist

Michael D. Hurd, PhD

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- Director of the RAND Center for the Study of Aging
- Researches Geriatrics, Labor Markets, Personal Savings, and Social Security
- Focuses on the structure of private pensions and Social Security effects on retirement decisions and the economic status of the elderly
- Most recent research on monetary costs of dementia and the costs of long-term care

David Knapp, PhD

Economist

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- His research focuses on recruitment, retention, and retirement related issues faced by workers, households, and employers
- Affiliate Faculty-Pardee RAND Graduate School
- Recent work includes evaluating how public-sector teachers' retention decisions respond to changes in the structure of their compensation, as well as similar work on how the structure of compensation affects civil service retention in the Department of Defense, and a study of near-retirement divorce on retirement security.

Erik Meijer, PhD

Adjunct Economist

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- Current research is in the economics of aging: Social Security, retirement, saving, investment, and health. Recent and ongoing work includes studying cross-country differences in health and cognition, the effects of retirement on cognitive decline, and the relationships between job characteristics and retirement. Researches the elderly, health disparities, health economics, retirement and retirement benefits, and Social Security

The RAND Corporation (cont'd)

<p>Kathleen J. Mullen, PhD Senior Economist Kathleen_Mullen@rand.org @KathleenJMullen</p>	<ul style="list-style-type: none"> • Her work addresses the economics of disability, health and retirement, with an emphasis on the incentive effects of social insurance programs such as Social Security and Social Security Disability Insurance (SSDI) • Studied the effects of change in Social Security incentives in other countries for workers in old ages and what those findings suggest about reforms in the U.S. • Director-RAND Center for Disability Research • Editor in Chief-RAND Journal of Economics
<p>Susann Rohwedder, PhD Senior Economist Susann_Rohwedder@rand.org</p>	<ul style="list-style-type: none"> • Associate Director for the RAND Center for the Study of Aging • Her research focuses on the economics of aging in the areas of household consumption and saving behavior, retirement, long-term care and expectation formation. She has written on the impact of public pensions on household saving; the adequacy of retirement resources of U.S. households near retirement; the effect of retirement on cognitive ability; spending and saving patterns among the older population; the lifetime risk of nursing home entry and associated out-of-pocket expenditures; and various topics involving individuals' expectations about future outcomes.
<p>Kathryn Edwards, PhD Associate Economist Kathryn_Edwards@rand.org</p>	<ul style="list-style-type: none"> • Professor at the Pardee RAND Graduate School • Her research spans diverse areas of public policy, including the financial resources available to unemployed households, the role of Social Security in wealth inequality, the challenges in retirement facing older Americans, and the sources of health insurance for disabled workers. • Recent projects: An Investigation of the Effect of Social Security Disability Insurance on the Health of Non-Disabled Spouses.

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The mission of Social Security Works is to, protect and improve the economic security of disadvantaged and at-risk populations; safeguard the economic security of those dependent, now or in the future, on Social Security; and maintain Social Security as a vehicle of social justice

Nancy Altman President	<ul style="list-style-type: none">• Chair of the Strengthen Social Security Coalition• Chairman of the Board of Directors of the Pension Rights Center• Currently serving on the Social Security Advisory Board (Term:10-2017 to 10-2023)•
Alex Lawson Executive Director	<ul style="list-style-type: none">• Convening member of the Strengthen Social Security Coalition• Previously Communications Director• Coordinates the education and advocacy operations
Eric Kingson, PhD Chair -Board of Directors	<ul style="list-style-type: none">• Professor of social work at Syracuse University's School of Social Work• Founding board member of the National Academy of Social Insurance• Senior Research Associate in the Maxwell School's Center for Policy Research

Recent Proposals That Would Affect Trust Fund Solvency

The Trust Funds associated with Social Security (the ***Old-Age and Survivors Insurance [OASI] Trust Fund*** and the ***Disability Income [DI] Trust Fund***) are monitored and reported on annually by the Social Security Board of Trustees. An excerpt from the most recent public report from the Board, points to concerns regarding the long-term financial viability of these funds. “Neither Medicare nor Social Security can sustain projected long-run program costs in full under currently scheduled financing, and legislative changes are necessary to avoid disruptive consequences for beneficiaries and taxpayers.”

Various policymakers and external organizations have long recognized this impending funding problem, for a variety of corrective actions. SSA tracks these proposals and provides memoranda on the actuarial impact of these proposals, presenting the material to the public via their website (www.ssa.gov). Projections and estimates are based on the intermediate assumptions made in the most recent Trustees Report available at the time the proposal was made.

The remainder of this section will summarize a collection of these proposals, beginning with the Social Security Guarantee legislative framework proposed by AMAC. For more information about AMAC’s Social Security Guarantee, visit www.AMAC.us/social-security.

For official proposals submitted to Congress, the material will identify the official name of the proposal and its sponsor(s).

The AMAC Social Security Guarantee

AMAC's founder, Dan Weber, has been in the forefront of the fight to address the problems facing America's Social Security program. In AMAC's view, Social Security has two long-term weaknesses:

- (1) The level of financial support projected for future beneficiaries will be inadequate, given the evaporation of private pensions and the steadily rising cost of living. The AMAC proposal addresses this with a tiered approach to COLA adjustments that guarantees yearly increases weighted to support low incomes, and the implementation of an Early Retirement Account (ERA) designed to provide a way for workers to accumulate a financial base sufficient enough to enable retirement before becoming a Social Security beneficiary.
- (2) The program in its current configuration is nearing deficit spending, causing a gradual depletion of the Social Security Trust Fund. If left unchecked, projections are that the Trust Fund balance will be exhausted by 2035, with the result being a substantial scale-down of payments to beneficiaries. AMAC's proposal calls for a two-year setback in the early and normal retirement ages and an adjustment to the Primary Insurance Amount (PIA) for higher wage earners.

As an action-oriented association, AMAC is resolved to do its part to call for action on this very serious problem, and has developed a simple, actuarially sound solution to the long-term Social Security solvency problem. We've advanced this proposal on Capitol Hill, with AMAC representatives resolute in their mission to get the attention of lawmakers. Many meetings and discussions with congressional offices and their legislative staffs over the past several years have explored the AMAC approach, with the result that the ideas contained in the proposal have begun to gain traction with legislators.

AMAC's proposal has three Prime Directives:

- 1) Increase benefits for those with lower earnings
- 2) Achieve solvency and ensure benefits continue
- 3) Provide a means for all earners to have more income available at retirement

The Prototype Plan – Keep basic Social Security, ensuring its solvency, modernizing it, and guaranteeing Cost of Living increases each year.

The AMAC Social Security Guarantee

The promise to guarantee Social Security for all Americans must be kept. AMAC has examined the many proposed solutions presented in the intermediate assumptions portion

of the 2019 Trustees Report and selected the alternatives we feel are best suited to save Social Security. We have combined these selected assumptions with several other recommendations to achieve what is the best path to long-term Trust Fund solvency without raising taxes.

This proposal as presented here is believed to succeed in achieving all of these directives.

I. INCREASE BENEFITS FOR THOSE WITH LOWER EARNINGS

Implement a tiered approach to the calculation of Cost-of-Living Adjustments (COLA) as follows:

- a) For Beneficiaries with a household income (AGI) level less than \$20,000, set an annual COLA range of 3% minimum – 4% maximum.
- b) For Beneficiaries with a household income (AGI) between \$20,001 and \$50,000 set an annual COLA range of 1.5% minimum – 3% maximum.
- c) For Beneficiaries with a household income (AGI) of \$50,001 or higher, set an annual COLA range of 1% minimum – 2% maximum.

Note: In 2010, 2011, and 2016, there was no Social Security COLA, despite the fact that expenses most common to seniors (e.g., food, insurance, medical treatment, prescription drugs, etc.) continued to rise sharply. ***Under this plan, all retirees will be guaranteed an increase each year⁶.***

II. ACHIEVE SOCIAL SECURITY TRUST FUND SOLVENCY

1. **Implement a setback in the retirement age for new retirees:**

- Early retirement age should remain at 62. The percentage of benefit reduction for early retirement would remain as determined by the Social Security Administration (e.g., a range of 20% to 30%, depending on normal retirement age).
- After the normal retirement age (NRA) reaches 67 for those attaining age 62 in 2022, increase the NRA by 2 months per year until the NRA reaches age 69 for those attaining age 62 in 2034. Thereafter, increase the NRA in a manner that will keep the ratio of (life expectancy at NRA)/(NRA-20) constant. This is likely to result in an expected increase in the NRA of 1 month every 2 years. Additionally, increase the age up to which delayed retirement credits may be earned, on the same schedule (3 years past the NRA).

⁶ Medicare premium increases could offset the guaranteed COLA.

(Source: Table A, Section 4 - 7/13/2016 Office of the Chief Actuary letter to Rep. Ribble, H.R. 5747 sponsor)

2. Change the level of payments for future retirees starting in 2022

- **Adjust the Primary Insurance Amount (PIA)**, keeping lower income earners benefits the same and lowering benefits for higher income earners.
- **Progressive price indexing (50th percentile) of PIA factors beginning with individuals newly eligible for OASDI benefits in 2023:**
 - Create a new bend point at the 50th percentile of the AIME distribution of newly retired workers. Maintain current-law benefits for earners at the 50th percentile and below. Reduce the 32 and 15 percent factors above the 50th percentile such that the initial benefit for a worker with AIME equal to the taxable maximum grows by inflation rather than the growth in the SSA average wage index.
(Source: Level of Monthly Benefits Summary [2016 Trustees Report intermediate assumptions], item B1.4)
- **For the OASI and DI computation of the PIA**, gradually reduce the maximum number of drop-out years from 5 to 0, phased in over the years 2018-2026.
(Source: Level of Monthly Benefits Summary [2016 Trustees Report intermediate assumptions], item B4.3)
- **Bipartisan Policy Center's Commission on Retirement Security and Personal Savings Plan—Enhance Survivors Benefits:** Beginning for newly eligible retired workers and spouses in 2022, all claimants who are married would receive a specified joint-and-survivor annuity benefit (i.e., surviving spouses would receive 75 percent of the decedents' benefits, in addition to their own) that would be payable if both were still alive. Initial benefits would be actuarially adjusted to keep the expected value of benefits equivalent to what would otherwise be current law (i.e., with the other provisions of this package incorporated).

(Note: Under this calculation, surviving spouses would receive a significantly higher benefit)

(Source: Table A, 6/9/2016 Office of the Chief Actuary letter to Messrs. Conrad and Lockhart, Co-Chairs)

The AMAC Social Security Guarantee prototype plan combines the provisions shown above, and includes the addition of a new benefit that we feel Social Security must include if it is to help and encourage workers to secure a sufficient retirement.

III. PROVIDE A MEANS FOR ALL EARNERS TO HAVE MORE INCOME AVAILABLE AT RETIREMENT

The “Social Security Plus” account will be a supplemental voluntary companion benefit retirement account to provide access to additional funds for all workers at age 62.

- Voluntary account for both employee and employer
- The individual is the owner of this supplemental retirement savings account
- Tax deduction for employer, after-tax for employee with income sheltered
- Employee not taxed on receiving funds (similar to a Roth IRA)
- Paid via payroll deduction, employer provides the contribution slot to employee
- After the Social Security Plus (“SSP”) account becomes available, employer must offer to all employees (full and part-time)
- When new employees are hired, they must opt out of the SSP account or they will be enrolled at \$10/week
- The weekly minimum is \$5, the weekly maximum is \$100 or \$5,200/year
- Employer may elect to contribute to employees’ SSP account in any amount or percentage of pay they choose up to \$50 per week (\$2,600 per year)
- The employer may start or stop their contribution at any time
- Portability, if wage earner changes jobs, new employer must add payroll access for the SSP
- Funds only available to wage earner at age 62 or because of death or total disability
- Wage earner may elect to start receiving payouts at any age between 62 and 70 ½
- Death benefit is the accrued value of account at time of death
- SSP account benefits, including earnings, are tax-free
- Contribution is indexed for inflation at 4%

Investment options for the Social Security Plus savings account

- 80% of the funds must be invested in stock funds (i.e. S & P 500 index)

- The other 20% may be invested in any approved conservative investment (Guaranteed)
- A volunteer board of investment experts creates lists of approved investments to assure quality
- Investment choices would be similar to those used in 401k plans and IRAs and the cost of administration would be borne by the same providers who offer those plans, not the federal government

Why a new Social Security Plus early retirement savings account?

Fifty million Americans have no retirement plan, and the average person receiving retirement benefits collects slightly more than \$16,000 per year. Accordingly, the **majority** of retired workers rely on Social Security as the largest portion of their retirement income. For many Americans, Social Security is their only source of income. There is an urgent need to help workers save more for retirement.

How the AMAC plan achieves solvency

The projected shortfalls in the Trust Fund are shown in the Trustees annual report. There are two actuarial projections used; the Long-range balance and the Annual balance in the 75th year from the report.

Both balances are in the negative; specifically, the Long-range actuarial balance is expected to be -2.66 and the 75th year annual balance is projected at -4.35.

The AMAC proposal incorporates the 3 provisions discussed above, all of which have been scored by the Office of the Chief Actuary. Each improves one or both of the actuarial balances so that the total effect appears to meet the goal of achieving positive balances (See chart in Exhibit A).

It must be understood that because of the interaction of the changes on each other, the office of the Chief Actuary will be asked to conduct the rigorous and detailed analysis required to determine if a true surplus in the Trust fund will result from these changes.

Exhibit A

Effects of Proposed Changes			
Long-Range Actuarial Balance	Annual Balance in 75 th Year	Description	Source
-2.66	-4.35		From 2016 Trustees Report
+1.01	+2.21	Retirement Age Setback	H.R. 5747, Section 4
+1.00	+2.64	Progressive Price Indexing for PIA (50 th percentile)	Office of the Chief Actuary; 2016 Trustees Report intermediate assumptions
+.60	+.92	Reduction of drop-out years in PIA calculations	Office of the Chief Actuary; 2016 Trustees Report intermediate assumptions
+0.06	-0.14	Enhanced Survivor benefits	Bipartisan Policy Center Proposal, Table A
+.01	+1.28	Net Change in Balance assumptions	

These changes will assure the continuation of Social Security benefits for future generations of Americans.

Exhibit B

Logic associated with AMAC Proposals

Tiered COLA Approach

Based on IRS data, 149 million tax returns filed in 2015 (2014 tax year) included 27 million containing Social Security benefits. Using this data, we calculated average AGIs and Social Security benefits for the three AGI brackets addressed in the AMAC Guarantee’s COLA proposal. We then modeled these averages to show what the COLAs would be at the high, mid, and low levels (3%-3.5%-4% for low incomes; 1.5%,-2.25%-3% for middle incomes; and 1%-1.5%-2% for high incomes) and compared these two a hypothetical inflation rate of 2.7%.The results indicate that the AMAC proposal is sustainable using the low to mid percentages in the recommended COLA range. Using the high end of the AMAC exceeds the 2.7% inflation factor slightly.

Retirement Age Setback

For those born before 1954, the normal retirement age (NRA) is 66, gradually advancing to age 67 for those born in 1960 or later. Increasing the NRA by 2 months per year until the NRA reaches age 69 for those attaining age 62 in 2034, and thereafter increasing the NRA in a manner that will keep the ratio of (life expectancy at NRA)/(NRA-20) constant, is expected to result in an increase in the NRA of one month every two years. The age up to which delayed retirement credits can be earned would likewise advance, but stay on the same schedule as currently in effect (3 years past the NRA). The effect of this change is a long-term reduction in the gap between promised benefits and required payroll revenue of roughly 2.21%.

Progressive Price Indexing for PIA (50th percentile)

Social Security uses average wage indexing (AWI) to adjust the bend points used in the Primary Insurance Amount (PIA) calculation each year. In 2014 and 2015, AWI produced increases of 3.55% and 3.48%, respectively. The recommendation calls for no change from this approach for workers with AIMEs at the 50th percentile and below, but calls for the upper two bend points for those above the 50th percentile to be adjusted using inflation rates, which tend to be lower (e.g., the CPI-W for 2015 was negative, but the AWI resulted in a positive 3.48% bend point change). Over the 75-year horizon, this change to the Social Security benefit calculation is expected to eliminate 38% of the shortfall by reducing the gap between promised benefits and required payroll tax revenue by 2.64%.

Reduction of drop-out years in PIA calculations

Currently the OASDI primary insurance amount (PIA) is computed using average indexed monthly earnings (AIME) reflecting an averaging period for the number of elapsed years after the year of attaining 21 and before the year of attaining benefit eligibility reduced by a number of “drop-out” years. The number of dropout years is set at 1 for each full 5 elapsed years, but not more than a total of 5 drop-out years. Under this provision the maximum number of drop-out years would be reduced to 4 for all OASDI beneficiaries becoming eligible in 2010, to 3 years for those becoming eligible in 2012, to 2 years for eligibility in 2014, 1 year for eligibility in 2016, and zero for eligibility in 2018 and later. The effect of this provision, taken alone, would be to reduce the size of the long-range OASDI actuarial deficit by 0.60 percent of taxable payroll, and the 75th year annual deficit by 0.92 percent of payroll. (Warshawsky)

Enhanced Survivor benefits

Currently, surviving spouses receive the higher of their individual benefit or the deceased spouse’s benefit. Beginning for newly eligible retired workers and spouses in 2022, surviving spouses would receive 75 percent of the decedents’ benefits, in addition to their own. Under this calculation, surviving spouses would receive a significantly higher benefit. For example, a spouse receiving a \$2,000 benefit and a dependent spouse receiving a \$1,000 benefit together receive \$3,000. Under current law, if spouse A dies, spouse B receives the larger of the two benefits (in this case, \$2,000). Under the proposed calculation, spouse B would receive \$2,500 (the original \$1,000 plus 75% of spouse A’s benefit (\$1,500) for a total benefit of \$2,500, a total increase of \$500 or 25%.

Additional Proposals That Would Affect Trust Fund Solvency

Bill No.	Title (Sponsor)
HR 2302	Protecting and Preserving SS Act (Deutch)
HR 567	Save SS Act of 2019 (Crist)
HR 4516	SS Protection Act of 2019 (Brownley)
HR 141/S. 521	Social Security Fairness Act of 2019 (Davis/Brown)
HR 3934	Equal Treatment of Public Servants Act of 2019 (Brady)
HR 3971	Senior Citizens Tax Elimination Act (Massie)
HR 860/S. 269	Social Security 2100 Act (Larson/Blumenthal)
HR 1170/S. 478	Social Security Expansion Act (DeFazio/Sanders)
HR 4157	Fairness in Social Security Act of 2019 (Neguse)
HR 5392	Social Security Enhancement and Protection Act of 2019 (Moore)
S. 1132	Protecting and Preserving Social Security Act (Hirono)
HR 4121	Social Security for Future Generations Act of 2019 (Lawson)
S. 1950	Strengthen Social Security by Taxing Dynastic Wealth Act (Van Hollen Jr.)
S. 3234	Social Security Solvency and Sustainability Act (Paul)

Additional Proposals That Would Affect Trust Fund Solvency (Cont'd)

HR 2302 – Protecting and Preserving SS Act

Sponsor: **Rep. Theodore Deutch (D-FL)**

This bill revises the methodology for calculating Old Age, Survivors, and Disability Insurance (OASDI) benefits and phases out the cap on compensation subject to Social Security taxation.

The bill directs the Bureau of Labor Statistics to prepare and publish a Consumer Price Index for Elderly Consumers (CPI-E) to track cost-of-living changes for individuals age 62 or older. The Social Security Administration shall use the CPI-E to calculate the cost-of-living adjustment for OASDI benefits, where it currently uses the Consumer Price Index for Urban Wage Earners and Clerical Workers.

The bill phases out and after 2025 eliminates the cap on compensation (\$132,900 in 2019) subject to Social Security taxation. This change applies to both wage earners and the self-employed.

The bill also changes the calculation for the primary insurance amount (the amount received by a beneficiary who elects to receive OASDI benefits at full retirement age) by including the additional earnings that are now taxed as a result of the cap elimination.

HR 567 – Save SS Act of 2019

Sponsor: **Rep. Charlie Crist (D-FL)**

This bill modifies the requirements for Social Security payroll taxes and benefits to apply Social Security payroll taxes to annual income above \$300,000, include earnings above \$300,000 in the benefit formula, and increase to \$100,000 the income threshold above which a portion of a taxpayer's Social Security benefits is included in gross income. (Under current law, Social Security payroll taxes apply to the first \$132,900 of income in 2019 and a portion of benefits is included in the gross income of individuals with certain income that exceeds thresholds of \$0, \$25,000, or \$32,000, depending on the individual's filing status.)

Additional Proposals That Would Affect Trust Fund Solvency (Cont'd)

HR 4516 – SS Protection Act of 2019

Sponsor: **Rep. Julia Brownley (D-CA)**

This bill provides continuing appropriations to the Social Security Administration if an appropriations bill for an SSA account has not been enacted before a fiscal year begins or a joint resolution making continuing appropriations for the account is not in effect.

The bill provides appropriations at the rate of operations that was provided for the prior fiscal year to continue programs, projects, and activities for which funds were provided in the preceding fiscal year.

HR 141/S 521 - Social Security Fairness Act of 2019

Sponsors: Rep. Rodney Davis (R-IL)/ Sen. Sherrod Brown (D-OH)

The Social Security Fairness Act is bipartisan legislation would permanently end both of those provisions: the Windfall Elimination Provision (WEP) and Government Pension Offset (GPO). If enacted, it would take effect after December 2019.

The House version was introduced on January 3 as bill number H.R. 141, by Rep. Rodney Davis (R-IL13). The Senate version was introduced the next month on February 14 as bill number S. 521, by Sen. Sherrod Brown (D-OH).

HR 3934 - Equal Treatment of Public Servants Act of 2019

Sponsor: **Rep. Kevin Brady (R-TX)**

To amend title II of the Social Security Act to replace the windfall elimination provision with a formula equalizing benefits for certain individuals with noncovered employment, and for other purposes.

Additional Proposals That Would Affect Trust Fund Solvency (Cont'd)

HR 3971 - Senior Citizens Tax Elimination Act

Sponsor: **Rep. Thomas Massie** (R-KY)

This bill amends the Internal Revenue Code to repeal the inclusion of any Social Security or tier I railroad retirement benefits in gross income for income tax purposes. The bill also: (1) appropriates funds to cover reductions in transfers to the Social Security and Railroad Retirement Trust Funds resulting from the enactment of this bill, and (2) expresses the sense of Congress against using tax increases to provide revenue necessary to carry out this bill.

HR 860/S. 269 – Social Security 2100 Act

Sponsor: **Rep. John Larson** (D-CT)/**Sen. Richard Blumenthal** (D-CT)

The Social Security 2100 Act would introduce several reforms in an effort to keep the program running until at least the title year of 2100. These include:

- Setting the minimum Social Security benefit for retirees at +25% above the poverty line, so people are no longer “retiring into poverty.”
- Raising the income threshold at which one’s Social Security benefits start getting taxed, from the current \$25,000 to \$50,000 for an individual, and from the current \$32,000 to \$100,000 for a couple filing jointly.
- Collecting payroll taxes to help pay for Social Security on higher levels of income, from the current \$132,900 maximum up to a new \$400,000.
- Uses a new formula to calculate the annual cost of living increases to Social Security benefits, from the current one which measures inflation for the population at large (called CPI-W) to another formula which measures inflation for the elderly population specifically (called CPI-E). Historically, this formula has averaged +3.3% annually, slightly higher than +3.1% for the whole population at large.

Additional Proposals That Would Affect Trust Fund Solvency (Cont'd)

HR 1170/S. 478 - Social Security Expansion Act

Sponsor: **Rep. Peter DeFazio** (D-OR)/**Sen. Bernard Sanders** (I-VT)

To enhance Social Security benefits and ensure the long-term solvency of the Social Security program. The Bill addresses:

- Across-the-board benefit increase.
- Computation of cost-of-living increases.
- Increase in minimum benefit for lifetime low earners based on years in the workforce.
- Extended benefit eligibility for children who are full-time students
- Payroll tax on remuneration up to contribution and benefit base and more than \$250,000.
- Tax on net earnings from self-employment up to contribution and benefit base and more than \$250,000.
- Tax on investment gain.
- Social Security Trust Fund established.

HR 4157 - Fairness in Social Security Act of 2019

Sponsor: **Rep. Joe Neguse** (D-CO)

This bill amends the Internal Revenue Code to exclude from modified adjusted gross income any lump-sum social security benefit payment (i.e., a payment of more than one month of social security benefits) that is attributable to months ending before the beginning of the taxable year.

Additional Proposals That Would Affect Trust Fund Solvency (Cont'd)

HR – 5392 - Social Security Enhancement and Protection Act of 2019

Sponsor: **Rep. Gwen Moore** (D-WI)

To amend title II of the Social Security Act to make various reforms to Social Security, and for other purposes. Bill addresses Increase in special minimum benefit for lifetime low earners based on years in the workforce, Establishment of an increased benefit for beneficiaries on account of long-term eligibility, Extension of child's benefit for full-time post-secondary school students under age 26, Determination of taxable wages and self-employment income above contribution and benefit base after 2019, New bend point for amounts above contribution and benefit base, Increase in employment tax rate, and Non-application of increase in Social Security benefits for means-tested programs.

S. 1132 - Protecting and Preserving Social Security Act

Sponsor: **Sen. Mazie Hirono** (D- HI)

This bill revises the methodology for calculating Old Age, Survivors, and Disability Insurance (OASDI) benefits and phases out the cap on compensation subject to Social Security taxation.

The bill directs the Bureau of Labor Statistics to prepare and publish a Consumer Price Index for Elderly Consumers (CPI-E) to track cost-of-living changes for individuals age 62 or older. The Social Security Administration shall use the CPI-E to calculate the cost-of-living adjustment for OASDI benefits, where it currently uses the Consumer Price Index for Urban Wage Earners and Clerical Workers.

The bill phases out and after 2025 eliminates the cap on compensation (\$132,900 in 2019) subject to Social Security taxation. This change applies to both wage earners and the self-employed.

Additional Proposals That Would Affect Trust Fund Solvency (Cont'd)

S. 1132 - Protecting and Preserving Social Security Act (Cont'd)

The bill also changes the calculation for the primary insurance amount (the amount received by a beneficiary who elects to receive OASDI benefits at full retirement age) by including the additional earnings that are now taxed as a result of the cap elimination.

HR 4121 - Social Security for Future Generations Act of 2019

Sponsor: **Rep. Al Lawson** (D-FL)

To amend title II of the Social Security Act to enhance Social Security benefits and maintain the commitment and the long-term solvency of the Social Security program. Bill addresses Payroll tax on wages and self-employment income up to contribution and benefit base and more than \$250,000, Inclusion of earnings over \$250,000 in Social Security benefit formula, Computation of cost-of-living increases, Extended benefit eligibility for children who are full-time students, Increase in minimum benefit for lifetime low earners based on years in the workforce, Alternate benefit amount for widow's and widower's insurance benefits, Holding SSI, Medicaid, and CHIP beneficiaries harmless.

S. 1950 - Strengthen Social Security by Taxing Dynastic Wealth Act

Sponsor: **Sen. Chris Van Hollen Jr.** (D-MD)

This bill returns the taxation of estates and gifts to levels that were in effect in 2009. This increases the maximum rate for estates and gifts to 45% and modifies exemptions.

The bill also combines the existing Social Security trust funds into a single Social Security Trust Fund and provides for the deposit of increased estate and gift tax revenue into the consolidated trust fund.

Additional Proposals That Would Affect Trust Fund Solvency (Cont'd)

S. 3234 – Social Security Solvency and Sustainability Act

Sponsor: Sen. Rand Paul (R-KY)

A bill to adjust the normal and early retirement ages for receipt of benefits under the Social Security program, increase the maximum age for delayed retirement credit, and provide for progressive price indexing of benefits.

Acronym Reference List

ACA: Affordable Care Act
AIME: Average Indexed Monthly Earnings
AWI: Average Wage Index
CHIP: Children's Health Insurance Program
COLA: Cost of Living Adjustment
CPI-E: Consumer Price Index for the Elderly
CPI-W: Consumer Price Index for Urban Wage Earners and Clerical Workers
DHHS/HHS: Department of Health and Human Services
DI: Disability Insurance
GPO: Government Pension Offset
HI: Hospital Insurance
NRA: Normal Retirement Age
OASDI: Old Age and Survivor's Disability Insurance
OASI: Old Age and Survivor's Insurance
PIA: Primary Insurance Amount
PSA: Personal Savings Account
SS: Social Security
SSA: Social Security Administration
SSI: Supplemental Security Income
Tax Max: Taxable Maximum
WEP: Windfall Elimination Provision
YOCs: Years of Coverage
YOWs: Years of Work

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Williams, David

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*ISBN #'s provided are the recent numbering system, ISBN-13, revised from the old ISBN-10 system, unless otherwise indicated.

**No ISBN available

Interesting Facts about Social Security

For most of our working lives, the concept of Social Security has been a bit abstract. Yes, we notice it every time we look at a paystub or certainly when we go through the annual income tax filing process and, yes, we dream about the day when we finally reach the golden age of retirement and we begin to see a return on what we've paid in through the years. But for the most part it's a largely intangible concept during our early and mid-life working years.

As we approach that retirement phase, or when other factors cause us to think about Social Security and its place in American history, many of us tend to wonder about the lesser-known background items related to this enormous system and its origins. Here are a few little-known facts about Social Security that tend to keep inquiring minds awake at night:

- Social Security marked its 80th anniversary in August of 2015. The program was signed into law on August 14, 1935 by President Franklin D. Roosevelt.
- Since its inception, over 450 million different Social Security numbers have been issued (about 5.5 million new ones each year).
- Social Security numbers are not reused upon death.
- The 3-2-4 structure of your Social Security number has a purpose: the first three digits represent where you're from (prior to 1972, they identified the state where you originally applied, and after that they identified the zip code of your mailed application). The early program administrators needed some way to organize the filing cabinets into sub-groups, to make them more manageable, and this is the scheme they came up with
- No Social Security numbers have ever been issued with 000, 666, or 900-999 as the first three digits, or zeros in the middle two or last four positions.
- There are three different types of Social Security cards issued: the card issued to U.S. citizens and permanent residents; a "not valid for employment" version; and a "valid for work only with DHS authorization" version.
- At its outset, Social Security pledged that the employee/employer withholding rate of 2% each up to a maximum of \$3,000 annually would begin in 1949 and would never increase. That same pledge also indicated that eligible beneficiaries would get a maximum amount of \$85 a month for life after age 65. (Of course, that was then, this is now!)

There are also some anecdotal items that have transpired during Social Security's more than 80-year history, like the amusing tale of Hilda Schrader Witcher. It seems her employer, E.H. Ferree Company of Lockport, NY elected to imitate reality by using her Social Security number on an insert in the wallets they were selling. Despite steps that were taken to ensure understanding that the insert was for display purposes only, more than 40,000 people claimed the number as their own. The result was chaotic for Mrs. Witcher, who was subsequently issued a replacement number.

Interesting Facts about Social Security (cont'd)

Then there's the recurring problem of accuracy in Social Security's Death Master File. The website dakkadakka.com observes that this file lists over "6.5 million 'people' with Social Security numbers over the age of 112," despite findings by the Gerontology Research Group that there have been only 35 people known to have reached the age of 112 in the world.⁷ And, "A recent government audit revealed that the Social Security Administration had incorrectly listed 23,000 people as dead in a two-year period. These people have sometimes faced difficulties in convincing government agencies that they are actually alive..."⁸

So, it's logical that with a program of this size there is an almost unlimited opportunity for interested parties to engage in lively conversation about the many nuances and details surrounding Social Security. Here are a few additional points that will help you be prepared to join in any impromptu debates you may encounter along the way:

- 64 Million Americans received benefits in November 2019 (42 million retired workers, 6 million surviving spouses, and 11 million disabled workers)
- The total amount paid out through Social Security in November 2019 was almost \$87 billion, (the average monthly payout was \$1,358 per beneficiary)
- The maximum monthly payout to individual recipients is \$3,011
- Cost of Living Adjustments (COLA) were first initiated in 1972, and currently use CPI-W (Consumer Price Index for Urban Clerical and Wage Earners) as its factor
- People with lower incomes receive higher ratios of annual benefits to taxes.
- For workers who earned average wages and retired at the age of 65 in 1980, it took 2.8 years of receiving old-age benefits to recover the value of their payroll taxes (including interest). For workers who retired in 2003, it will take 17.4 years. For workers who will retire in 2020, it will take 21.6 years. This assumes Social Security will have enough money to pay scheduled benefits for this entire period, which it is not projected to have.⁹
- "Social Security replaces about 40 percent of an average wage earner's income after retiring, and most financial advisors say retirees will need 70 percent or more of pre-retirement earnings to live comfortably."¹⁰
- All taxes that have been paid into the Social Security system since its inception have already been (1) spent to pay for benefits, (2) spent to fund the administrative overhead of the program, or (3) loaned to the federal government.¹¹

⁷ <https://www.dakkadakka.com/dakkaforum/posts/list/639350.page>

⁸ https://en.wikipedia.org/wiki/Social_Security_Death_Index

⁹ <http://www.justfacts.com/socialsecurity.asp>

¹⁰ <http://www.ssa.gov/pubs/EN-05-10024.pdf>

¹¹ <http://www.justfacts.com/socialsecurity.asp#f67>

Interesting Facts about Social Security (cont'd)

Through history, there have been a number of unique and celebrated people surfacing in the annals of Social Security. Among them are:

Ackerman, Ernest	<ul style="list-style-type: none"> • First recipient of a lump-sum Social Security benefit check. In January 1937, he received a check in the amount of 17 cents...a return on his total investment of 5 cents.
Altmeyer, Arthur J.	<ul style="list-style-type: none"> • Part of the committee to draft the original legislative proposal in 1934 • Chairman of the Social Security Board 1937 • One of the few responsible for how Social Security exists today
Burns, Eveline M.	<ul style="list-style-type: none"> • Economist and educator at Columbia University • Member of the Committee on Economic Security in 1934 working on employment security issues • Authored three books on Social Security • Consultant to the Social Security Board in 1936
Epstein, Abraham	<ul style="list-style-type: none"> • Early advocate of Old Age Security • His "European Plan" for social security was adopted by New York in 1935 • Advocated for Social Welfare and Unions
Fuller, Ida May	<ul style="list-style-type: none"> • First person to receive monthly benefit pay outs • First check on January 31, 1940 for the amount of \$22.54
Fuller, Mary Falvey	<ul style="list-style-type: none"> • One of the first two Public Trustees appointed as non-government overseers of Social Security and Medicare Trust Funds
Jaffe, Suzanne Denbo	<ul style="list-style-type: none"> • One of the first two Public Trustees appointed as non-government overseers of Social Security
Perkins, Frances	<ul style="list-style-type: none"> • Appointed as Franklin Roosevelt's Secretary of Labor in 1933 • First woman to hold a cabinet position in the United States • Played key role in writing New Deal legislation, including minimum wage laws • Involved in every aspect of creating the Social Security of 1935
Roosevelt, Franklin D.	<ul style="list-style-type: none"> • Signed the Social Security Act on August 14, 1935 • In October 1929, in response to the Great Depression, started a relief system that later became the model for the New Deal's Federal Emergency Relief Administration (FERA))
Winant, John G.	<ul style="list-style-type: none"> • Appointed as the first head of the Social Security Board in 1935 by Franklin Roosevelt • Held the position until 1937
Witte, Edwin E.	<ul style="list-style-type: none"> • "Father of Social Security" • First president of the Industrial Relations Research Association in 1948 and president of the American Economic Association in 1956

Appendix 1 – Former SSA Commissioners

Commissioner	Term of Service	
	From	to
Arthur J. Altmeyer	July 16, 1946	April 10, 1953
William L. Mitchell (Acting)	April 11, 1953	November 23, 1953
John W. Tramburg	November 24, 1953	July 31, 1954
Charles I. Schottland	August 23, 1954	December 31, 1958
William L. Mitchell	February 4, 1959	April 3, 1962
Robert M. Ball	April 17, 1962	March 17, 1973
Arthur E. Hess (Acting)	March 18, 1973	October 24, 1973
James B. Cardwell	October 25, 1973	December 12, 1977
Don I. Wortman (Acting)	December 13, 1977	October 4, 1978
Stanford G. Ross	October 5, 1978	December 31, 1979
Herbert R. Doggette (Acting)	January 1, 1980	January 2, 1980
William J. Driver	January 3, 1980	January 19, 1981
Herbert R. Doggette (Acting)	January 20, 1981	May 5, 1981
John A. Svahn	May 6, 1981	September 12, 1983
Martha A. McSteen (Acting)	September 14, 1983	June 25, 1986
Dorcas R. Hardy	June 26, 1986	July 31, 1989
Gwendolyn S. King	August 1, 1989	September 30, 1992
Louis D. Enoff (Acting)	October 1, 1992	July 18, 1993
Lawrence H. Thompson (Acting)	July 19, 1993	October 7, 1993
Shirley S. Chater	October 8, 1993	February 28, 1997
John J. Callahan (Acting)	March 1, 1997	September 28, 1997
Kenneth S. Apfel	September 29, 1997	January 20, 2001
William Halter (Acting)	January 21, 2001	March 28, 2001
Larry G. Massanari (Acting)	March 29, 2001	November 9, 2001
Jo Anne B. Barnhart	November 9, 2001	January 19, 2007
Linda S. McMahon (Acting)	January 20, 2007	February 11, 2007
Michael J. Astrue	February 12, 2007	February 13, 2013
Carolyn W. Colvin (Acting)	February 14, 2013	January 20, 2017
Nancy A. Berryhill (Acting)	January 21, 2017	June 17, 2019
Andrew M. Saul	June 17, 2019	Present

Appendix 2 – Additional SSA Staff

Budget, Finance, and Management

**Deputy Commissioner-
Budget, Finance, and Mgmt.
Michelle A. King**

**Assistant Deputy
Commissioner
Daniel F. Callahan**

**Assistant Deputy
Commissioner
Seth P. Binstock ***

Communications

**Deputy Commissioner
Communications
Michel N. Korbey**

**Assistant Deputy Commissioner
Darlynda K. Bogle**

Hearings Operations

**Deputy Commissioner
Hearings Operations
Theresa L. Gruber**

**Assistant Deputy Commissioner
Elaine Garrison-Daniels**

General Counsel

**General Counsel
Royce B. Min**

**Deputy General Counsel
John J. Lee**

**Deputy General Counsel
Eric P. Kressman***

Human Resources

**Deputy Commissioner, Human Resources
Marianna LaCanfora**

**Assistant Deputy Commissioner
Bonnie L. Doyle**

*Acting

Appendix 2 – Additional SSA Staff (cont'd)

Legislation and Congressional Affairs

**Deputy Commissioner, Legislation and
Congressional Affairs**
Eric R. Skidmore*

Assistant Deputy Commissioner
Dennis R. Foley*

Operations

**Deputy Commissioner,
Operations**
Grace M. Kim

**Assistant Deputy
Commissioner**
Erik N. D. Jones

**Assistant Deputy
Commissioner**
Frederick M. Maurin

Retirement and Disability Policy

**Deputy Commissioner, Retirement &
Disability Policy**
Mark J. Warshawsky

Assistant Deputy Commissioner
Stephen G. Evangelista

Systems

**Deputy Commissioner/Chief Information
Officer, Systems**
Rajive K. Mathur

**Assistant DC/Deputy Chief Information
Officer**
James C. Borland

**Assistant DC/Deputy Chief Information
Officer (IT Modernization)**
Sean P. Brune

Assistant DC/ (IT Business Support)
Sylviane D. Haldiman

Assistant DC/ (Software Engineering)
Diana E. Andrews

Chief Technology Officer
John C. Morenz

**Executive Director Office of Health
Information Technology**
Jude R. Soundar

Analytics, Review, and Oversight

**Deputy Commissioner, Analytics, Review,
and Oversight**
B. Chad Bungard

**Assistant Deputy Commissioner, Analytics,
Review, and Oversight**
Brad A. Flick

*Acting

Appendix 3 – Former Members of the SSAB

<p>Jo Anne Barnhart 3/97 - 11/01</p>	<ul style="list-style-type: none"> ● Political and public policy consultant to state and local governments on welfare and social services ● Former Assistant Secretary for Children and Families, Department of Health and Human Services
<p>Bradley Belt 12/03 – 4/04</p>	<ul style="list-style-type: none"> ● Resigned after appointment to Executive Director of the Pension Benefit Guarantee Corporation ● Former President of the Washington Capital Group, Inc.
<p>Dana Bilyeu 12/06 – 9/10</p>	<ul style="list-style-type: none"> ● Executive Officer of the Public Employees’ Retirement System of Nevada ● Serves on the Public Employee Advisory Board for the International Foundation of Employee Benefit Plans
<p>William Brooks 1/96 – 9/96</p>	<ul style="list-style-type: none"> ● Director and Chairman of the Compensation Committee at the United American Healthcare Corporation ● Former Trust Manager at the United Investors Realty Trust
<p>Jeffrey Brown 10/06 – 9/08</p>	<ul style="list-style-type: none"> ● Professor in the Department of Finance at the University of Illinois at Urbana-Champaign ● Former Assistant Professor of Public Policy at Harvard University’s John F. Kennedy School of Government

Appendix 3 – Former Members of the SSAB (Cont’d)

<p>Alan L. Cohen 9/14 – 9/16</p>	<ul style="list-style-type: none"> ● Previously served as Senior Budget Advisor and Chief Counselor for Social Security for the U.S. Senate Committee on Finance from 2001-2012
<p>Lanhee Chen 9/13 – 9/18</p>	<ul style="list-style-type: none"> ● Research Fellow at the Hoover Institution ● Director of Domestic Policy Studies, Lecturer in the Public Policy Program, Lecturer in Law and affiliate of the Institute for International Studies at Stanford University ● Member Board of Trustees of the Junior Statesmen Foundation
<p>Hal Daub 1/02 – 9/06</p>	<ul style="list-style-type: none"> ● Former member U.S. House of Representatives representing the 2nd District of Nebraska ● Partner- law firm Blackwell Sanders Peper Martin, and former Mayor of Omaha, NE
<p>Bernadette Franks-Ongoy 01/13 – 09/18</p>	<ul style="list-style-type: none"> ● Executive Director of Disability Rights Montana ● Former President of the National Disability Rights Network
<p>Lori Hansen 10/94 - 9/00</p>	<ul style="list-style-type: none"> ● Policy Analyst at the National Academy of Social Insurance ● Former Technical Assistant to Social Security Administrator Robert Ball
<p>Dorcas R. Hardy 04/02 – 09/16</p>	<ul style="list-style-type: none"> ● President of D. R. Hardy & Associates ● Former Social Security Administration Commissioner from 1986 - 1989

Appendix 3 – Former Members of the SSAB (Cont'd)

<p>Marsha Katz 11/06 - 9/12</p>	<ul style="list-style-type: none"> ● Project Director at the University of Montana Rural Institute in Missoula ● Former Vice President of the Association for Community Advocacy in Ann Arbor, Michigan
<p>Barbara Kennelly 01/06 – 09/17</p>	<ul style="list-style-type: none"> ● Former President, National Committee to Preserve Social Security and Medicare ● Former member of the U.S. House of Representatives, 1st District of Connecticut
<p>Martha Keys 11/94 - 9/05</p>	<ul style="list-style-type: none"> ● Former member of the U.S. House of Representatives representing the 2nd District of Kansas ● Former Special Advisor to the Secretary of Health, Education, and Welfare and Assistant Secretary of Education
<p>David Podoff 10/00 - 9/06</p>	<ul style="list-style-type: none"> ● Visiting Associate Professor in the Department of Economics and Finance at the Baruch College of the City University of New York ● Former Minority Staff Director and Chief Economist for the Senate Committee on Finance
<p>Harlan Mathews 1/96 - 10/97</p>	<ul style="list-style-type: none"> ● Resigned October 1997 ● Former U.S. Senator representing Tennessee <p style="text-align: center;">Previously Secretary of the Cabinet for Tennessee Governor Ned McWherter and Tennessee's State Treasurer</p>

Appendix 3 – Former Members of the SSAB (Cont'd)

<p>Sylvester J. Schieber 1/98 - 9/09 (Chair – 2006-2009)</p>	<ul style="list-style-type: none"> ● Director of the Research and Information Center at Watson Wyatt Worldwide ● Former Director of Research at the Employee Benefit Research Institute
<p>Gerald Shea 1/96 – 11/97, 10/00 – 09/04</p>	<ul style="list-style-type: none"> ● Assistant to the president for Government Affairs at the AFL-CIO ● Serves as a public representative on the Joint Commission on the Accreditation of Health Care Organizations ● Founding Board member of the Foundation for Accountability
<p>Arthur “Pete” Singleton 11/94 - 10/96</p>	<ul style="list-style-type: none"> ● Resigned after appointment to Chief of Staff for the Ways and Means Committee ● Staff member of the Ways and Means Committee ● Served as a Marine in World War II
<p>Stanford Ross 10/97 – 9/02</p>	<ul style="list-style-type: none"> ● Partner at law firm of Arnold & Porter LLP ● Former Commissioner of Social Security and Public Trustee of the Social Security and Medicare Trust Funds
<p>Mark J. Warshawsky 12/06 – 9/12</p>	<ul style="list-style-type: none"> ● Director of Retirement Research at Watson Wyatt Worldwide ● Serves on the Advisory Board of the Pension Research Council of the Wharton School

Appendix 3 – Former Members of the SSAB (Cont'd)

<p>Carolyn Weaver 10/94 - 9/97</p>	<ul style="list-style-type: none">• Resident Scholar and Director of the Social Security and Pension Project at the American Enterprise Institute• Former Senior Advisor to the 1983 National Commission on Social Security Reform
<p>Mark Weinberger 10/00 – 5/01</p>	<ul style="list-style-type: none">• Resigned after appointment to Assistant Secretary of the Treasury for Tax Policy• Former Director of the U.S. National Tax Practice for Ernst & Young LLP

INDEX

- Aaron, Henry J., 22, 33, 67
Aasen, Henriette Sinding, 67
Abrams, Burton A. PhD, 42
Achenbaum, W. Andrew, 67
Ackerman, Ernest, 115
Adler, Michael, 67
Ahmad, Ehtisham, 67
Akabas, Shai, 31
Allen, Angela, 67
Altman, Nancy, 49, 67
Altman, Nancy J., 22
Altmeyer, Arthur J., 67, 115
Alvarez, Jacob T., 67
AMAC, 3, 5, 50, 51
AMAC Foundation, 5
Amado, Nicole L., 67
Andrew M. Saul, 7, 117
Andrews, Diana E., 119
Andrews, William H., 67
Anforth, Allan, 67
Antos, Joseph, 29
Armour, Philip PhD, 47
Arnold, R. Douglas, 67
Arrington, Jodey, 18
Asen, Robert, 68
Association of Mature American
Citizens, 3
Attarian, John, 68
Azar, Alex M., 7
Baba, PhD, Steve, 68
Bacon, Jr., James A., 68
Bailey, Joel, 19
Baily, Martin Neil, 68
Baker, Dean PhD, 36
Baker, PhD, Dean, 68
Baker, Sandy, 68
Bakija, John, 68
Ball, Robert M., 68
Barber, RFC, Dean, 68
Barendt, E. M., 68
Barnes, Helen, 68
Barnhart, Jo Anne, 120
Bean, Charles R., 68
Becker, Charles M., 68
Bedard, Michael, 68
Behrendt, Christina, 69
Béland, Daniel, 69
Bell, Colin, 69
Bell, Josh, 18
Belt, Bradley, 120
Benavie, Arthur, 69
Bennet, Michael, 11
Bergham, Jos, 69
Bergman, Andrew, 69
Bergmann, Barbara R., 69
Berkley, Benjamin, 69
Berko, Robert L., 69
Berkowitz, Edward D., 69
Berkowitz, Monroe, 69
Bernstein, Merton D., 70
Beyer, Don, 19
Bian, Zhao Man Zhu, 70
Biggs, Andrew G. PhD., 29
Biggs, PhD, Andrew G., 70
Billman, Jeff, 15
Bilyeu, Dana, 120
Binet, Gylles, 70
Binstlock, Seth P., 118
Bipartisan Policy Center, 31
Birken, Emily Guy, 70
Bishop, Harold M., 70
Black, David F., 8
Blackburn, Robin, 70
Blahous, Charles P. PhD, 45
Blahous, PhD, Charles P., 40, 70
Blankenship, Jim, 70

Blanpain, Roger, 70
 Bloch, Frank S., 70
 Blumenauer, Earl, 19
 Blumenthal, Rona, 70
 Blumenthal, Sen. Richard, 61
 Boccia, Romina, 39
 Bogedan, Claudia, 70
 Bogle, Darlyinda K., 118
 Bogle, John C., 70
 Bohr, Sarah, 70
 Bombara, Ken, 70
 Bombard, Tate, 71
 Bonner, David, 71
 Bonoli, Giuliano, 71
 Boos, Monica, 71
 Boothe, EA, Milton G., 71
 Borgmann, Christoph Hendrik, 71
 Borland, James C., 119
 Borowiec, Judge Frank B., 71
 Bosworth, Barry P., 33, 71
 Boyd-Carpenter, Thomas, 71
 Boyle, Brendan, 17
 Bradsher, Tanya, 19
 Brady, Kevin P., 15
 Brady, Rep. Kevin, 60
 Brandt, Daniel, 12
 Breister, Christopher, 71
 Brennan, Geoffrey, 71
 Brielmaier, Robert L., 71
 Brill, Alex, 30
 Brinker, Paul A., 72
 Brodshaug-Bernstein, Joan, 72
 Brohawn, Dawn K., 72
 Brookings Institution, 33
 Brooks, Arthur C., 30
 Brooks, Greg, 20
 Brooks, Robin, 72
 Brooks, William, 120
 Brown, Edward J., 72
 Brown, Jeffrey, 120
 Brown, Jeffrey R., 72
 Brown, Sen. Sherrod, 60
 Brown, Sherrod, 11
 Brownley, Rep. Julia, 60
 Brune, Sean P., 119
 Buchanan, Vern, 20
 Buck, T. G., 72
 Bungard, B. Chad, 119
 Burgess, Jami, 12
 Burke, Sheila, 72
 Burkhauser, Richard V., 72
 Burlington, Janet U., 72
 Burns, Eveline N., 115
 Burr, Richard, 12
 Burtless, Gary T., 72
 Burton, David R., 39
 Bush, James Cleaver, 72
 Bush, Thomas E., 72
 Cabot, Kyber, 72
 Callahan, Daniel P., 118
 Campbell, Andrea Louise, 72
 Campbell, John Y., 73
 Cantillon, Bea, 73
 Cantwell, Maria, 12
 Capretta, James C., 30
 Cardin, Benjamin L., 12
 Carlson, JD, CPA, Robert C., 73
 Carnley, D., 73
 Carper, Thomas R., 12
 Carroll, Devin, 73
 Carter, Marshall N., 73
 Casey Jr., Bob, 11
 Casey, Jack, 73
 Casey, Maura, 73
 Cashell, Brian W., 73
 Cassidy, Bill, 10
 Castles, Francis Geoffrey, 73
 Cato Institute, 29, 35, 39
 Cavey, Esq., Nancy L., 74
 Center for Economic and Policy
 Research, 36

Center on Budget and Policy Priorities,

37

Chan, Chak Kwan, 74

Cheiken, Kimberly V., 74

Chen, Lanhee, 40

Chimsky, Mark Evan, 74

Chu, Judy, 19

Cichon, Michael, 74

Clark, Hanna M., 74

Clark, Robert L., 74

Clasen, Jochen, 74

Clements, Benedict J., 74

Coady, David, 75

Cogan, John F., 40

Collins, Michael, 19

Columbus, Aaron, 75

Conason, Joe, 75

Conn, Eric C., 75

Conrad, Kent, 31

Constitution, 9

Constitutional Convention, 9

Cornyn, John, 12

Cortez Masto, Catherine, 11

Cost of Living Adjustments (COLA),

114

Costa, Dora L., 75

Cottrell, Jackie, 12

Cousins, Mel, 75

Craig, Lee A., 75

Crapo, Mike, 12

Crevits, Dries, 75

Crist, Rep. Charlie, 59

Crumbley, D. Larry, 75

D'Haeseleer, Steven, 76

Daines, Steve, 12

Daly, Mary, 75

Daniels, Esq., Scott, 75

Daniels, Harvey, 75

Dankler, Mike, 20

Daub, Hal, 121

Davis, Danny, 19

Davis, Mike, 75

Davis, Rep. Rodney, 60

Dean, David, 75

Deans, Don, 75

Deaven, Paul O., 75

DeCasper, Jennifer, 12

Dedul, Alexander, 75

DeFazio, Rep. Peter, 62

DelBene, Suzan, 19

Delgado, Melvin, 76

Demarco, Edward J., 76

Deppe, CMFC, John D., 76

Deppe, CPA, Angela S., 76

Derthick, Martha, 76

Desai, Sonali, 19

Detlefs, Dale R., 76

Deutch, Rep. Theodore, 59

Deutsch, David, 76

DeWitt, Larry, 76

DI Trust Fund, 2

Diamond, David A., 76

Diamond, Peter A., 76

Dickens, Thomas L., 76

Didiuk, Monica, 20

Dils, Jan, 76

Dimenstein, Katherina, 20

Dixon, John, 76

Dobbernack, Donate, 76

Dobelstein, PhD, Andrew, 77

Dobie, M.D., Robert A., 77

Dodds, Bill, 77

Doeschot, Reinoud, 77

Doggett, Lloyd, 19

Dogu, Laura F., 77

Dokken, Wade, 77

Dorfman, Mark C., 77

Douglas, James H., 31

Douglas, Paul H. (1892-1976), 77

Downey, Kirstin, 77

Doyle, Bonnie L., 118

Drèze, Jean, 77

Drouin, Anne, 77
Dubin, Jon, 77
Duncna, Barbara, 77
Edwards, Kathryn PhD, 48
Edwards, Yul, 19
Eghigian, Greg, 77
Eich, Frank, 77
Eisner, Robert, 78
Ellis, Abraham, 78
Ellis, Charles D., 78
Elsasser, CFP, RHU, REBC, Joe, 78
Employee Benefit Research Institute,
 38
English, Cachavious, 19
Enzi, Michael B., 12
Epstein, Abraham, 78, 115
Epstein, MBA, Lita, 78
Epstein, Pierre, 78
Eschtruth, Andrew D., 78
Espinosa, Marsha, 16
Estes, PhD, Carroll, 78
Estes, Ron, 18
Evangelista, Stephen G., 119
Evans, Dwight, 19
Farman, Carl Hugo, 78
Farrell, PhD, Patricia A., 78
Father of Health Savings Accounts, 42
Feldman, Rayah, 78
Feldstein, Martin, 79
Fenge, Robert, 79
Ferguson, A. Drew, 18
Ferrara, Peter J., 79
Ferri, Richard A., 79
Fery, Matthew, 17
Fichtner, Jason J. PhD, 24
Fields, Gary S., 79
Fitzgerald, John, 79
Flora, Peter, 79
Florio, Mike, 19
Foley, Dennis R. (Acting), 119
Foley, Joe (J.P.), 79
Former SSA Commissioners, 117
Foster Esq., Amy L., 79
Franken, Al, 79
Frase, Robert W., 79
Fried, MBA, CPA, Joseph, 79
Friedman, Benjamin M., 79
Friedman, Sheldon, 79
Fuller, Ida May, 115
Fuller, Mary Falvey, 115
Fullerton, Don, 79
Galasso, Vincenzo, 80
Gale, William G., 34, 80
Galvan, Sal, 80
Gang, Lin Min, 80
Gard, Sean, 19
Garrison-Daniels, 118
Gelles, Richard J., 80
George, Victor, 80
Ghilarducci, Teresa, 80
Gilbert, Neil, 80
Giovanetti, Tom, 43
Gist, John R., 80
Gitis, Ben, 32
Gloppen, Siri, 80
Glynn, Timothy P., 80
Gokhale, Jagadeesh, 23, 80
Goldberg, Marc, 12
Goldsmith, Jeff, 80
Gomez, Jimmy, 19
Gonzalez, Nancy J., 8
Goodman, John C. PhD, 42
Goodstein, Sam, 13
Goss, Stephen C., 8
Goss, Stephen C. Goss, 8
Graetz, Michael J., 80
Graham, Jed, 80
Gramlich, Edward Martin, 81
Gran, Brian, 81
Grassley, Chuck, 10
Gray, Gordon, 28
Greaney, Michael D., 81

Greenberg, Hana, 19
Grossman, MSPH, Brian R., 81
Grover, Trevor L., 81
Gruber, Jonathan, 81
Gruber, Theresa L., 118
Guerre, Bertha Alisia, 19
Gupta, Ravi Kumar, 81
Gupta, Sanjeev, 81
Gustman, Alan H., 81
Hacker, Jacob S., 81
Haldiman, Sylviane D., 119
Hall, Charles T., 81
Hall, Stephanie J., 8
Haltzel, Laura, 81
Hammond, Jr., P. Brett, 82
Hansen, Lori, 121
Hardy, Dorcas R., 23, 82
Hardy, Melissa, 82
Harney, Mike, 13
Harris, Neville S., 82
Hartel, Christine R., 82
Hassan, Maggie, 12
Hay, CPA, CFP, Lisa G., 82
Hazelrigg, Lawrence, 82
Hickman, Natasha, 12
Higgins, Brian, 17
Hilda Schrader Witcher, 113
Hills, John, 82
Hills, Michael J., 82
Hiltzik, Michael A., 82
Hinden, Stan, 82
Hinkle, Mark, 8
Hinz, Richard, 82
Hirono, Sen. Mazie, 63
Hirst, Mindy, 82
Hoagland, G. William, 32
Hoehne, John, 12
Holding, George, 20
Hollister, PhD, Brooke, 82
Holst, PhD, Roland, 83
Holtz-Eakin, Douglas, 28

Holzmann, Robert, 83
Hoobler, Dorothy, 83
Hoobler, Thomas, 83
Hood, John, 83
Hooker, Ian, 83
Hornbeck, Sean K., 83
Horsford, Steven, 19
Hoskins, Dalmer D., 83
House of Representatives, 14
Howard, Brad, 19
HR – 5392 - Social Security
Enhancement and Protection Act of
2019, 63
HR 1170/S. 478 - Social Security
Expansion Act, 62
HR 141/S 521 - Social Security Fairness
Act of 2019, 60
HR 2302 – Protecting and Preserving
SS Act, 59
HR 3934 - Equal Treatment of Public
Servants Act of 2019, 60
HR 3971 - Senior Citizens Tax
Elimination Act, 61
HR 4121 - Social Security for Future
Generations Act of 2019, 64
HR 4157 - Fairness in Social Security
Act of 2019, 62
HR 4516 – SS Protection Act of 2019,
60
HR 567 – Save SS Act, 59
HR 860/S. 269 – Social Security 2100
Act, 61
Huber, Evelyne, 83
Hudson, Robert B., 83
Hughes, Jordan E., 83
Hui, Ben Shu Bian Wei, 83
Hultberg, Carl, 83
Hurd, Michael D. PhD, 47
Hurrelmann, Achim, 83
Hyde, Mark, 83

Interesting Facts about Social Security,
113

Ippolito, Richard A., 84

Isakson, Johnny, 12

Ito, Shuhei, 84

Ivliev, Vladimir, 84

Iwry, J. Mark, 34

Jackson, Richard, 84

Jacobs, Alan M., 84

Jacobs, David, 84

Jafari, Beth, 12

Jaffe, Suzanne Denbo, 115

Jarmin, Gary, 84

Jarrell, PhD, George R., 84

Jasper, Margaret, 84

Jehle, Faustin F., 84

Jenkins, Shirley, 84

John, David C., 34

Jones, Asha, 19

Jones, Erik N. D., 119

Jones, M. D., 85

Joondeph, Robert, 23

Josheski, Dushko, 85

Kangur, Alvar, 85

Karpel, Craig S., 85

Karpie, Robert James, 85

Karvelas, Dave, 20

Katz, Marsha, 121

Kelly, Mike, 20

Kendall, Thomas, 85

Kent, Graeme, 85

Kesselring, Randall, 85

Keys, Martha, 121, 122

Khakimzhanov, Sabit, 85

Kildee, Daniel, 16

Kilmer, Pat, 85

Kim, Grace M., 119

Kind, Ron, 19

King, Michelle A., 118

Kingson, Eric PhD, 49

Kingston, Eric R., 85

Kirkegaard, Jacob Funk, 85

Klein, Jennifer, 85

Klos, Joseph J., 85

Knapp, David, 47

Knobel, Coy, 12

Koitz, David, 86

Kollmann, Geoffrey, 86

Korbey, Michael N., 118

Kotlikoff, Laurence J., 86

Kraft, Robert A., 86

Kressman, Eric P., 118

Kritzer, Barbara, 86

Kubitschek, Carolyn, 86

Kuchler, Bonnie Louise, 86

Kuptsch, Christiane, 86

Kurland, Norman G., 86

LaCanfora, Marianna, 118

LaHood, Darin, 20

Landis, Andy, 86

Lange, Matthew, 86

Lankford, Bill, 11

Larimore, Taylor, 87

Larson, John B., 16

Larson, Rep. John, 61

Laursen, Eric, 87

Lavaca, Gabrielle L., 87

Lawrence, Juliana, 87

Lawson, Alex, 49

Lawson, Rep. Al, 64

Lazarov, Darko, 87

Lee, John J., 118

legislative process, 25

Leibfried, Stephan, 87

Leisering, Lutz, 87

Leonard, V.R., 87

Leopold, J.D., M.S., Barbara L., 87

Lerner, J.D., Katherine, 87

Leuchtenburg, William E., 88

Levy, Jonah D., 88

Lewis, Jane, 88

Lewis, John, 19

Lewis, Lindsay Mark, 46
 Liebman, Jeffrey B., 88
 Light, Paul Charles, 88
 Lindauer, Mel, 88
 Lindeman, David C., 88
 Little, Bruce, 88
 Livingston, Steven G., 88
 Lockhart III, James B., 32
 Lubove, Roy, 88
 Lykova, Lidia A., 88
 Lynch, Christopher, 12
 Lynch, Frederick R., 88
 Lynes, T., 88
 MaCurdy, Thomas E., 41
 Maes, An, 88
 Magnussen, Anne-Mette, 88
 Malanga, Steven, 44
 Malloy, James, 88
 Manhattan Institute, 44
 Marchant, Kenny, 20
 Marchenko, Grigori, 88
 Margolius, Sidney, 88
 Marks, Judge Ronald A., 89
 Marmor, Theodore, R., 89
 Marshall, Will, 46
 Martens, Kerstin, 89
 Maruo, Naomi, 89
 Masakatsu, Morishita, 89
 Mashaw, Jerry L., 89
 Massie, Rep. Thomas, 61
 Mast, Brent D., 89
 Mathews, Harlan, 122
 Mathur, Rajive K., 119
 Matthews, Joseph L., 89
 Matthews, Merrill PhD, 43
 Matthews-Berman, Dorothy, 89
 Mau, Steffen, 89
 Maurer, PhD, Raimond, 89
 Maurin, Frederick M., 119
 Mayer, Peter, 89
 McCarthy, John, 17
 McCormick, Harvey L., 90
 McDonough, Elaine, 90
 McGillivray, Warren R., 90
 McGovern, George, 90
 McKinley, Charles, 90
 McMahan, E. J., 44
 Meierding, PhD, Loren, 90
 Menendez, Robert, 12
 Mercatus Center, 24
 Meriam, Lewis, 90
 Mesa-Lago, Carmelo, 90
 Mesher, John, 90
 Meyer, Charles W., 90
 Meyer, William, 90
 Meyerson, Noah P., 90
 Michael Mandel, 46
 Midgley, James, 90
 Millar, Jane, 91
 Milner, Helga, 91
 Min, Royce B., 118
 Minns, Richard, 91
 Mitchell, Peter, 91
 Mitchell, PhD, Olivia S., 91
 Mittman, Esq., Brian M., 91
 Mnuchin, Steven T., 7
 Modigliani, Franco, 91
 Moeller, Phillip, 91
 Moon, Marilyn, 91
 Moore, Gwen, 19
 Moore, Rep. Gwen, 63
 Moran, Shawn, 91
 Morenz, John C., 119
 Morgan, Kimberly J., 91
 Morton III, MD, David A., 91
 Morton, William R., 92
 Moser, Julia, 92
 Mucchetti, Michael, 19
 Mullen, Kathleen J. Ph, 48
 Mulligan, Casey B., 92
 Mullins, I. K., 92
 Mulvey, Francis P., 92

Mulvey, Janemarie, 92
Munnell, PhD, Alicia Haydock, 92
Muralidhar, Arun, 92
Murphy, John, 92
Murphy, Peter D., 92
Murphy, Stephanie, 19
Mussche, Ninke, 93
Myers, E. J., 93
Myers, Robert Julius, 93
Myers, Tracy G., 93
Nagelkerke, Ad, 93
Nair, Sobha B., 93
Nash, Gerald, 93
Nasiatka, Maryanne, 93
National Center for Policy Analysis, 42
Naumann, Ingela K., 93
Nawroki, Jay, 93
Neal, Richard E., 15
 Neguse, Rep. Joe, 62
Nelson, Jeff, 93
Nilssen, Even, 93
Norcross, Eileen, 45
Ntubitura, Jean d'Amour, 93
Nullmeier, Frank, 93
Nunes, Devin, 20
Nunoofio, Mabel, 93
Nuschler, Dawn, 93
O'Harra, Josh, 94
O'Keefe, Philip, 94
O'Shea, Casey, 17
 OASDI, 7, 15, 59, 63, 64, 66
 OASI Trust Fund, 2
Obinger, Herbert, 94
Obinger-Gindulis, Edith, 94
Ochsner, Edward Herman, 94
Ogus, CBE, BCL, MA, Anthony I., 94
Olivier, Marius, 94
Orenstein, Mitchell A., 94
Orman, Suze, 94
Orr, CFP, Mark J., 94
Orszag, Peter R., 95
Ortiz, Pablo Arellano, 95
Packard, Michael, 95
Paddon, Grace, 95
Page, John, 95
Panetta, Jimmy, 19
Parent, Antoine, 95
Parker, PhD, Phillip M., 95
Pascrell Jr., Bill, 17
Patterson, John P., 95
Pechman, Joseph A., 95
Penner, PhD, Rudolph G., 95
Pennings, Frans, 95
Perez-Montas, Hernando, 95
Perkins, Frances, 115
Pestieau, Pierre, 96
Peterson, Jonathan, 96
Peterson, Wallace, 96
Petillo, Paul, 96
Petow, Patricia A., 96
Pfrang, Steven, 20
Pierson, Christopher, 96
Pierson, Paul, 96
Pieters, Danny, 96
Piñera, José, 35
Piper, Mike, 96
Plamondon, Pierre, 96
Plank, Jilian, 20
pocket veto, 26
Podoff, David, 121, 122
Poole, Mary, 96
Pope, Ethan, 96
Popelier, Patricia, 96
Porter, John, 18
Portman, Rob, 10
Poynter, Richard, 97
Practico, Dominick, 97
Pratt, David A., 97
Pratt, Fran, 97
Prince, Michael John, 97
Prins, Rienk, 97
Progressive Policy Institute, 46

Proszek, Lisa B., 97
 Pugach, Noel, 97
 Purcell, Patrick, 97
 Quadagno, Jill, 97
 Quinn, Joseph F., 97
 Rae, Evonne, 98
 Rajan, S. Irudaya, 98
 Rasmussen, Scott W., 98
 Razin, Assaf, 98
 Reed, Tom, 16
 Rees, Melvin E., 98
 Rehder-Harris, Amy, 98
 Reich, Elizabeth, 118
 Reichenstein, William, 98
 Reinhardt, Uwe, 98
 Reischauer, Robert D., 98
 Rejda, George E., 98
 Reschly, Daniel J., 98
 Rice, Dorothy P., 98
 Rice, Tom, 20
 Rich, Ben, 17
 Richards, Raymond, 98
 Richfield, Charles, 98
 Riedel, Eibe H., 98
 Riedl, Brian, 44
 Rieger, Elmar, 99
 Ritz, Ben, 46
 Rivlin, Alice M., 99
 Robalino, David A., 99
 Roberts, Pat, 12
 Robertson, A. Haeworth, 99
 Robson, William A., 99
 Rogne, PhD, Leah, 99
 Rohwedder, Susann Phd, 48
 Roman, Mark, 20
 Romig, Kathleen, 37, 99
 Rong, Jason, 99
 Rong, Zheng Chun, 99
 Roosevelt Jr., James, 99
 Roosevelt, Franklin D., 115
 Rosa, Jean-Jacques, 99
 Rosen, Diana, 99
 Rosenblatt, Roger, 99
 Rosnick, David, 36
 Ross, Stanford, 123
 Ross, Stanford G., 99
 Rossi, Nick, 12
 Rothenberg, Robert E., 99
 Rowland, Mark, 99
 Ruck, MS, CRC, Amberly M., 100
 Ruschmann, Paul, 100
 Russell, James W., 100
 Ryan, Paul D., 100
S. 1132 - Protecting and Preserving
 Social Security Act, 63, 64
S. 1950 - Strengthen Social Security by
 Taxing Dynastic Wealth Act, 64
 Sabates-Wheeler, Rachel, 100
 Sacks, J.D., Avram L., 100
 Saini, Debi Singh, 100
 Sainsbury, Roy, 100
 Salazar, Hector, 100
 Sánchez, Linda T., 16
 Sanders, Sen. Bernard, 62
 Sankaran, Trichy S., 100
 Santow, Leonard J., 100
 Santow, Mark E., 100
 Saparow, Bobby, 18
 Sass, PhD, Steven A., 100
 Sass, Raymond, 12
 Saul, Andrew, 8
 Sawhill, Isabel V., 101
 Saxer, Arnold, 101
 Scalia, Eugene, 7
 Schieber, Sylvester J., 101, 122
 Schiff, Irwin, 101
 Schmidt, Aaron, 19
 Schneider, Bradley, 17
 Schokkaert, Erik, 101
 Schottland, Charles I., 101
 Schultz, Michael, 101
 Schulz, James H., 101

Schwartzapfel, Steven, 101
Schweikert, David, 20
Sciacca, Carl, 101
Scott, Christine, 101
Scott, Miriam, 102
Scott, Tim, 12
Seitenova, Ai-Gul S., 102
Sellers, Ronnie, 102
Sen, Amartya, 102
Seuss (Dr. Seuss), 102
Sewell, Terri, 19
Shang, Baoping, 102
Shaviro, Daniel, 102
Shea, Gerald, 122
Shelton, Alison M., 102
Shemtob, Mark, 102
Sheng, Chen Ji, 102
Sheng, Zhang Zai, 102
Sherraden, Michael W., 102
Shibata, Hideaki, 102
Shipman, William G., 102
Shore, Warren, 102
Shoven, John B., 102
Shulman, Nicola, 102
Shultz, George P., 103
Sidor, Gary, 103
Siebert, Horst, 103
Sigg, Roland, 103
Sikorski-Petriz, Darlene, 103
Silbiger, Steven A., 103
Sin, Yvonne, 103
Sinclair, Stephen, 103
Sindell, Kathleen, 103
Sinfield, Adrian, 103
Singh, Parduman, 103
Singleton, Arthur "Pete", 123
Skidmore, Eric R., 119
Skidmore, Felicity, 103
Skidmore, Max J., 103
Skocpol, Theda, 103
Sluder, Nolan, 103
Smeeding, Timothy M., 103
Smith, Adrian, 20
Smith, Barbara W., 104
Smith, Daniel E., 104
Smith, Douglas M., 104
Smith, Jason, 20
Smith, Katie, 20
Smith, PhD, Allen W., 103
Smith, Willie, 19
 Social Security Act, 2
Social Security Administration, 3,
 6, 7, 24, 37, 59, 63, 66, 71, 73, 74,
 76, 78, 90, 91, 95, 99, 101, 112, 121
 Social Security Advisory Board, 21
 Social Security Board of Trustees, 3, 50
Social Security Works, 49
 Social Security's Death Master File, 114
Solin, Daniel R., 104
Solman, Paul, 104
Solway, MSW, MPH, Erica, 104
 Soroushian, John, 33
Soto, Mauricio, 104
Soundar, Jude R., 119
Spain, Emily, 12
 SSA, 6, 8, 29, 32, 50, 66, 67, 71, 99,
 118, 119
 SSI, 64, 66, 67, 75, 96, 101
Stabenow, Debbie, 12
Starke, Peter, 104
Stasiuk, Tomasz, 104
Steinmeier, Thomas L., 104
Stenken, JD, CLU, ChFc, Joseph F., 104
Stephanou, Scott, 16
Stephens, John D., 105
Stern, Ken, 105
Steuerle, C. Eugene, 105
Steverson, London, 105
Stewart, Maxwell Slutz, 105
Stiglitz, Joseph E., 105
Stockbridge, Ken, 105
Stokes, Dillard, 105

Stroia, Matthew, 20
Stuart, James, 105
Subrahmanya, R. K. A., 105
Sullivan, Jim, 105
Sulzer, Glenn, 105
Suozzi, Tom, 19
Sutherland, Peter, 105
Szczepanski, Marek, 105
Szuberla, Geri, 106
Szymendera, Scott, 106
Tabatabai, Nahid, 106
Tadayoshi, Morii, 106
Takayama, Noriyuki, 106
Takekawa, Shogo, 106
Tamborini, Christopher, 106
Tanner, Michael D., 35, 106
Taussig, Michael K., 106
Taylor, Linda, 106
 The AMAC Social Security Guarantee,
 51
The American Action Forum, 28
The American Enterprise Institute, 29
The Heritage Foundation, 39
The Hoover Institution, 40, 41
The Independent Institute, 42
The Institute for Policy Innovation, 43
The Mercatus Center, 45
The RAND Corporation, 47
Thielman, Jason, 12
 Think Tanks” Active in the Social
 Security Arena, 27
Thomas III, William W., 106
Thomas, Brian, 20
Thompson, Mike, 19
Thompson, PhD, Lawrence, 106
Thornton, Patricia, 106
Thune, John, 12
Tishler, Hace S., 107
Tollenaar, Albertjan, 107
Tomasson, Richard, 107
Tomkiel III, Stanley A., 107
Toomey, Patrick J., 12
Toru, Furuse, 107
Townsend, Peter, 107
Tranghese, William, 15
Traver, David, 107
Treadwell, Lauren, 107
Treanor, J. Robert, 107
Triest, Robert K., 107
Trozan, Peter A., 107
 Trust Fund, 50
 Trustees, 32, 50
Turnbull, John Gudert, 107
Turner, Fred, 12
Turner, PhD, John A., 107
Turner-Dixon, Kim, 19
Tyson, Eric, 107
 U.S. Senate, 9, 32
Urbaniak, Samuel, 108
Van Allen, Edward J., 108
Van Buggenhout, Bea, 108
Van de Water, Paul N., 108
Van der Water, Paul N., 37
Van Ginneken, Wouter, 108
Van Gorkom, J. W., 108
Van Hemel, Susan, 108
 Van Hollen Jr, Sen. Chris, 64
Van Langendonck, Jef, 108
Van Tassell, Melanie Rhinehart, 19
Vance, Judy, 108
Vandenburg, Michael, 108
VanDerhel, Jack PhD, 38
VanKuiken, Matt, 12
Vaughn Switzer, Jacqueline, 108
Vernon, Steve, 108
Vonk, Gijsbert, 108
Vosberg, CFP, ChFC, CLU, EA, Brian,
 108
Wadden, Alex, 108
Wadhawan, S. K., 109
Wagner, William J., 109
Wahab, PhD, Elias, 109

Walker, Robert, 109
Walliser, Jan, 109
Walorski, Jackie, 20
Walton, Ricky H., 109
Wang, Dewen, 109
Warner, Deborah, 109
Warner, Mark R., 13
Warshawsky, Mark J., 119, 123
Warshawsky, PhD, Mark J., 109
Watkins, Don, 109
Watson, Jennifer, 20
Wayne, Drew, 16
Weaver, Carolyn, 123
Weber, Dan, 5
Weinberger, Mark, 123
Weisbrot, Mark, 109
Wenstrup, Brad, 20
Whitaker, T., 109
White, Ellen G., 109
White, Joseph, 109
White, PhD, Jason T., 109
White, Robin, 110
Whitehouse, Sheldon, 13
Whitman, Victor L., 110
Whitman, Debra B., 110
Wikeley, Nicholas J., 110
Wilborn, Etta L., 110
Wilborn, Ralph, 110
Wilborn, Tim, 110
Williams, David, 110
Wilson, Jack W., 110
Winant, John G., 115
Wise, David A., 110
Witte, Edwin E., 115
Witte, Edwin Emil, 111
Witte, Phil D., 111
Wolfe, Jeffrey Scott, 111
Wolff, Edward N., 111
Wood, Penny, 111
Woods, Diane E., 111
Wunderlich, Gooloo S., 111
Wyden, Ron, 10
Wynne, Edward, 111
Xiang, Gao, 111
Xiang, Gu Min, 111
Xiang, Li Jia, 111
Yager, Fred, 111
Yager, Jan, 111
Yohannes, Meron, 33
Youakim, PhD, Maurice, 112
Young, Howard, 112
Young, Mitchell, 112
Young, Todd, 11
Yuan, Zheng Shang, 112
Zakharov, Mikhail L'vovich, 112
Zaman, Nadeem Uz, 112
Zayatz, Tim A., 112
Zelinski, Ernie J., 112
Zhi, Gao Ling, 112
Zürn, Michael, 112

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The AMAC Foundation has now been in operation for six years, and in that time has created a solid footprint in service to America's seniors. These services have taken the form of public seminars and workshops on topics vital to an aging constituency, the operation of a vigorous online presence designed to meet the needs of seniors, and the provision of direct services in the form of credible answers to questions about the mechanics of America's Social Security program.

This publication represents an extension of the AMAC Foundation's outreach efforts, and as noted in the Introduction, is intended as a guide in identifying the key players in the overall quest for a solution to Social Security's solvency dilemma. It's one of the many ways AMAC is playing an active role in addressing Social Security's long-term funding problems, with the hope of calling additional attention to the issue.

We need your help in this venture and as we continue to build the programs and projects that are so vital to America's seniors. Take this opportunity to co-invest in our mission—a mission that is making a difference on so many fronts and in so many lives.

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Thank you!

