

SEP/IRA ANALYSIS
YEAR END 2016
STUART LEVINE
SOURCE: INTERNAL REVENUE SERVICE

ACCESS:

<https://www.irs.gov/statistics/soi-tax-stats-accumulation-and-distribution-of-individual-retirement-arrangements>

or

<http://slnews.us/rbc010420>

(Last Viewed: January 4, 2020)

Row	ITEM	NUMBER	PERCENTAGE
A	Total # of Taxpayers	204,315,356	
B	Total # of Taxpayers with Pension Coverage on Forms W-2	74,056,673	
C	% of Taxpayers with Pension Coverage on Forms W-2 (B/A)		36.2463%
D	Taxpayers Eligible to Make IRA Contributions	157,857,108	
E	% of Taxpayers Eligible to Make IRA Contributions (D/A)		77.2615%
F	Total # of Taxpayers Who Made IRA Contributions	13,176,903	
G	Taxpayers Who Made IRA Contributions as % of Total Number of Taxpayers (F/A)		6.4493%
H	Taxpayers Who Made IRA Contributions as % of Eligible Taxpayers (F/D)		8.3474%
I	End of Year # Taxpayers w/IRAs/SEPs	19,878,994	
J	End of Year Total MV of IRAs/SEPs	\$697,102,514,000	
K	End of Year Average MV of IRAs/SEPs	\$35,067	
L	# of Taxpayers > \$1M w/IRAs/SEPs	155,625	
M	Taxpayers>\$1M w/IRAs/SEPs as % of All Taxpayers (M/A)		0.0762%
N	Total MV of IRAs Held by Taxpayers>\$1M w/IRAs/SEPs	\$36,614,441,000	
O	Avg. MV of IRAs/SEPs Held by Taxpayers>\$1M w/IRAs/SEPs	\$235,274	
P	Total MV of IRA's Held by Taxpayers>\$1M w/IRAs/SEPs as a % of Total MV of All of IRAs/SEPs (N/J)		5.2524%
Q	# of Taxpayers > \$200K w/IRAs/SEPs	2,863,440	
R	Taxpayers > \$200K w/IRAs/SEPs as % of All Taxpayers (Q/A)		1.4015%
S	MV of IRAs/SEPs Held by Taxpayers>200K	\$180,896,671,000	
T	Total MV of IRAs/SEPs Held by Taxpayers>200K as % of Total MV of All of IRAs/SEPs (S/J)		25.9498%
U	Total # Taxpayers > \$100K w/IRAs/SEPs	9,528,983	
V	Taxpayers > \$100K w/IRAs/SEPs as % of All Taxpayers (U/A)		4.6639%

**From
The Reality-Based Community
samefacts.com**

Row	ITEM	NUMBER	PERCENTAGE
X	MV of IRAs/SEPs Held by Taxpayers>100K	\$421,487,699,000	
Z	MV of IRAs/SEPs Held by Taxpayers>100K as % MV Held by All Taxpayers (X/J)		60.4628%
AA	Total # Taxpayers > \$75K w/IRAs/SEPs	12,333,571	
BB	Taxpayers > \$75K w/IRAs/SEPs as % of All Taxpayers (AA/A)		6.0365%
CC	MV of IRAs/SEPs Held by Taxpayers>75K	\$510,895,084,000	
DD	MV of IRAs/SEPs Held by Taxpayers>75K as % MV Held by All Taxpayers (CC/J)		73.2884%
EE	Avg. MV of IRAs/SEPs Held by Taxpayers>\$1M w/IRAs/SEPs	\$235,274	
FF	Avg. MV of IRAs/SEPs Held by Taxpayers>\$500K but Less than \$1M w/IRAs/SEPs	\$89,075	
GG	Avg. MV of IRAs/SEPs Held by Taxpayers>\$200K but Less than \$500K w/IRAs/SEPs	\$47,518	
HH	Avg. MV of IRAs/SEPs Held by Taxpayers>\$100K but Less than \$200K w/IRAs/SEPs	\$36,095	
II	Avg. MV of IRAs/SEPs Held by Taxpayers>\$75K but Less than \$100K w/IRAs/SEPs	\$31,879	
JJ	Avg. MV of All IRAs/SEPs	\$35,067	