

2019 required minimum distribution (RMD) account owner notifications



TCA by E*TRADE will notify RMD-eligible IRA account owners by letter of their RMD amount and include a partially completed IRA distribution form for their use by January 31, 2019.

Liberty provides a standard report to help you track your clients' RMDs. Another version of the RMD report that may be useful is the "RMD Report for One Representative," which references account owners specific to a representative.

Important—response by January 15, 2019 requested: You have the option to elect whether a copy of the RMD letters will be sent to you in addition to your clients. TCA by E*TRADE will comply with the election on the account. Please confirm that the election you've chosen on the account is correct. To learn more about this election, please contact your relationship manager.

Should you have questions regarding the 2019 RMD mailing, please contact your relationship manager.

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