

RMDs - Avoid the Year-End Rush

RMDs can be processed quickly and easily online through Liberty by Advisors and Representatives on the desktop and tablet applications. Federal and State Withholding can also be processed through this online distribution functionality.

If you would like to learn more about TCA's on-line distributions functionality, please contact your relationship manager.

Liberty provides a standard report to help you track your clients' RMDs. The RMD Report may be run for either IRAs, SIMPLE IRAs, or both.

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.

You may also contact your relationship manager with any questions.