

2016 RMD Account Owner Notifications

By February 1, 2016, TCA will notify RMD eligible IRA account owners by letter of their RMD amount and include a partially completed IRA distribution form for their use.

Please view a sample of the client letter and the Required Minimum Distribution (RMD) Request sample as provided in a separate attachment to this feature.

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 Requested: We will comply with the previous election to send a copy of the RMD letters to the financial representative, or not. Please contact your relationship manager to learn more about this election. If no election is received, TCA will not send to your financial representatives.

Should you have questions regarding the 2016 RMD mailing, please contact your relationship manager.