

IRAdirect® Pre-1099-R & 1099-Q Process Webinar (Online Process)



Common Purpose. Uncommon Commitment.

Performance Objectives

Describe the IRS reporting requirements regarding IRA and ESA distributions.

Verify and correct members' distribution information before reporting is completed using IRAdirect.

Audience

Staff from credit unions that are enrolled in CUNA Mutual Group's Fully-Administered IRAdirect program.

Length

Course: 90 minutes

Delivery Method

Webinar

Content

Describe 1099-Rs and 1099-Qs and what is reported on each statement.

Review how to produce Pre-1099-R and 1099-Q Verification Reports.

Explain how to correct withdrawal information using IRAdirect.

Prerequisite

Your credit union must be enrolled in the Fully-Administered IRAdirect program.

Overview

Each January, CUNA Mutual Group creates IRS Forms 1099-R and 1099-Q for your members.

Would you like to ensure that your forms are accurate?

This session will give you the information you need to use IRAdirect to verify and correct IRA and ESA withdrawal information before reporting is completed.

Next Step Solutions

IRAdirect 1099-R & 1099-Q Information Report Process Webinar (Online Process)

