

IRA/Pension Distributions (Form 1099-R, Form SSA-1099)



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There are four items to choose from, and within each item you can make entries for as many documents as needed.

IRA/Pension Distributions

| | |
|-----------------------------------|--------------------|
| Add or Edit a 1099-R | Begin |
| RRB-1099-R | Begin |
| Social Security Benefits/RRB-1099 | Begin |
| Nontaxable Distributions | Begin |
| | Continue to Income |

Select Nontaxable Distributions to record Qualified Charitable Distributions (QCD), qualified Health Savings Accounts funding distributions, and eligible retired public safety officer distributions for health insurance premiums.