

Publications

First Round of Guidance on Roth “In-Plan” Conversions

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SERVICES

The IRS recently posted changes to the 2010 Form 1099-R to address some of the reporting and withholding questions on Roth “in-plan” conversions. The actual guidance is explained in the attached memo and is consistent with guidance we requested as part of our comment letter to the IRS on these issues.

If you have any questions to be covered by an upcoming IRS Reporting Corner newsletter or wish to stay connected with various reporting and withholding updates related to employee benefits, please visit the IRS Reporting Corner.