

# Form 8915-E – Phase I

Form 8915-E for **Qualified 2020 Disaster Retirement Plan Distributions and Repayments**, is now available within the 2020 Pro Online application. For Phase I implementation, to trigger this form, the Code in Box 7 must be 1, J, or S. When a 1099-R is present with the before mentioned codes, preparers will be presented to option to utilize Form 8915-E if their clients would like. Phase II implementation will prompt the election to use Form 8915-E regardless of the code in Box 7.

FORM 8915-E

# Qualified 2020 Disaster Retirement Plan Distributions and Repayments



### COVID-19 is a qualified disaster

If you withdrew from a retirement account due to COVID-19, select Yes.

Did you make an early withdrawal from a retirement account due to a qualified disaster? \*

Yes

No

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FORM 8915-E

# Qualified 2020 Disaster Retirement Plan Distributions and Repayments

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Select the type of retirement account you made an early withdrawal from due to a disaster. \*

Non IRA retirement plan(s)

Traditional, SEP, or SIMPLE IRA(s)

ROTH IRA(s)



Enter the amount you withdrew as a result of qualified disasters.

Qualified 2020 disaster distributions made in 2020 \*

\$|



### 10% fee waiver limit

The early withdrawal fee can only be waived for withdrawals under \$100,000.

Applicable cost of distributions

Applicable cost of distributions

Amount of repayment made before filing this return