

# 1099-R Form Lookup

## For use with the Total Retirement Center (TRC)

### About the 1099-R Lookup Process

This resource provides the steps to locate a 1099-R form for a participant in the plan.

### How to Locate a 1099-R Form

1. Hover over the **Plan Management** tab and select **IRS 1099-R Lookup** from the dropdown menu.



2. Enter the participant's social security number and click **Submit**.

3. Once the screen loads you will be able to see the 1099-R forms that have been issued for the participant.

## IRS 1099-R Lookup

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Search for 1099-R form(s).

Enter SSN:

Submit



2017  
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**Note:** 1099Rs for the previous tax year are not available until after February 1st.

RS12384-00

4. Click on the **hyperlink** under the applicable year to access a PDF copy of the 1099-R form. Once the form loads, it can either be saved or printed.

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