

Documenting QDE Withdrawals



We have a tool for that!

When you're ready to use the money you've saved, you do not need to prove the withdrawal is for a QDE; however, in the event of an Internal Revenue Service (IRS) tax audit, documentation may be required to show proof of expenses. Additionally, Supplemental Security Income (SSI) recipients may need to provide the Social Security Administration with the details of each withdrawal.

To help Account Owners and Authorized Individuals keep track of withdrawals, we have created an optional [Withdrawal Log](#) you can download and use for your own record. Using this log to keep track of expenses is completely optional. This is not a required form and is not intended as tax advice.

[Withdrawal Log](#)