

THE FUTURE OF TAX RESEARCH HAS ARRIVED

TaxBert Your 24/7 AI Tax Research Assistant

TaxBert is **included** with a TTB WebLibrary Plus subscription at no additional cost.



ACCURACY MATTERS

With 99.86% of responses containing accurate citations to our internal knowledge base, TaxBert excels at its core function of providing verifiable information. This high citation accuracy ensures users can trace answers back to authoritative sources within TheTaxBook, maintaining transparency and trustworthiness.

99.86% CITATION ACCURACY

SYSTEM RELIABILITY

TaxBert demonstrates exceptional reliability with a 99.53% response rate. This means that users receive complete responses to virtually all queries, ensuring a seamless information retrieval experience.

99.53% SYSTEM RELIABILITY

TAXBERT USER SATISFACTION

TaxBert has achieved remarkable user satisfaction, with only 0.11% of responses receiving negative feedback. The low thumbs-down rate indicates users find responses helpful, relevant, and aligned with their information needs.

99.89% USER SATISFACTION

DID YOU KNOW? TaxBert can answer both Federal and State tax questions. Easily switch between jurisdictions with a click of your mouse.



TAX RESEARCH ASSISTANT

Think of TaxBert as your personal tax research assistant who is available 24/7. It answers tax questions quickly and accurately.



THETAXBOOK CONTENT

TaxBert is educated with the content from TheTaxBook. Reliable sources result in reliable answers.



DRAFT CLIENT MESSAGES

TaxBert is a great place to turn for initial drafts of communications to clients. Ask TaxBert to draft an email, letter, announcement, etc.



NATURAL CONVERSATION

Use natural conversation language to interact with TaxBert. Follow-up questions are encouraged should a topic need additional clarification.



SOURCES PROVIDED

Sometimes you want to dig deeper on a tax topic. Utilize the sources provided by TaxBert to continue your research.



CHAT RECALL

TaxBert remembers your previous conversations. Seamlessly scroll or search to revisit and continue past discussions at any time.

TAXBERT NAVIGATION & FEATURES

1. Jurisdiction Selection:

TaxBert can answer both Federal and State tax questions. Easily switch between jurisdictions with a click of your mouse.

2. Ask TaxBert:

Simply type your question in the dialog box and click the Send button.

Follow Up

Questions: If needed, ask TaxBert for additional clarification.

3. TaxBert Response:

TaxBert provides clear and concise answers.

4. Inline Citations

TaxBert provides citations to TheTaxBook content inline when answering your queries. Answers are directly linked to its source.

5. Copy: Utilize the copy feature to paste information into Word or an email.

6. New Chat: Start a New Chat.

TTB WEBLIBRARY Switch Product SEE CHAT RECALL BELOW Welcome, TTB Customer [Help](#) | [Account](#) | [Logout](#)

TaxBert **1** Federal State Current Chat: Tax-Free IRA Distribution Options Chats + New Chat **6**

Hello! I am TaxBert, an AI assistant trained on the **Federal** content found within TheTaxBook. Type your question in the text box below and I will answer it to the best of my ability.

If you'd like to ask a question about a specific **State** select the button above and choose from the dropdown.

Are there any ways for me to take my IRA distribution tax free?

3 Yes, there are several ways to take IRA distributions tax-free or with reduced tax impact:

- 1.** Qualified Roth IRA Distributions are tax-free if:
 - The account has been held for at least 5 years and
 - The distribution is made after age 59½, due to death/disability, or for a first-time home purchase **[1]** **4**
- 2.** Return of Basis:
 - If you made nondeductible contributions to a traditional IRA, part of each distribution represents a taxfree return of your cost basis **[2]**
- 3.** Roth IRA Distribution Order:
 - Contributions come out first and are always tax-free
 - Converted amounts come out next and are tax-free if previously taxed
 - Earnings come out last and are tax-free if the distribution is qualified **[3]**
- 4.** Qualified Charitable Distributions (QCDs):
 - Direct transfers from IRAs to qualified charities can be tax-free **[2]**

Keep in mind that proper documentation is crucial - especially for nondeductible contributions where you'll need to maintain records to prove your cost basis **[2]**

WebLibrary Citations
[1] - Deluxe & Deluxe Supplement - Retirement, Social Security, and Medicare - (Page 13-4)
[2] - Deluxe & Deluxe Supplement - Retirement, Social Security, and Medicare - (Page 13-8)
[3] - Deluxe & Deluxe Supplement - Small Business Retirement - (Page 29-3)
[4] - Deluxe & Deluxe Supplement - Retirement, Social Security, and Medicare - (Page 13-3)

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Type your question ... **2** Send

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CHAT RECALL

Chats

Open the Chats box to find additional tools that add a lot of functionality to TaxBert.

7. Search Chats: Search to revisit and continue past discussions at any time.

8. View Favorites: Use the View Favorites filter to see only your favorite chats.

9. Functions:

- Favorites
- Rename
- Save Chat as PDF
- Delete

Search chats and messages... **7** View Favorites **8**

5/16/2025

- Tax-Free IRA Distribution Options **9**
- LLC Tax Information
- Airbnb Schedule E Tax Reporting

5/12/2025

- Postponing Casualty Loss Insurance Gains

5/8/2025

- SIMPLE IRA with Roth Options



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