



OHIO
UNIVERSITY

**IRA/Pension/Annuity Distribution Form
2023-2024**

Review the directions below and answer accordingly. Visit <https://www.ohio.edu/financial-aid/forms> for directions on submitting your forms using our Secure Upload Portal, mailing, or faxing.

Student Name

Student PID (Pxxxxxxxx)

Written Student Signature (Electronic Signature Not Accepted)

Date

Written Parent Signature (Electronic Signature Not Accepted)

(Parent signature required for dependent students)

Date

Your family's 2021 1040 form indicates an IRA, pension, or annuity was distributed in 2021. Your assistance is needed to determine how the untaxed portion of the distribution was utilized. Please complete the bottom portion of this letter by marking the usage of your distribution and return it to our office.

- _____ 1.) The untaxed portion of the distribution was rolled over into an IRA/pension investment.
- _____ 2.) The untaxed portion of the distribution was received as a payment. The payment was utilized for:
- | | |
|---|---|
| <input type="checkbox"/> Medical Expenses _____ % | <input type="checkbox"/> Household Expenses _____ % |
| <input type="checkbox"/> Debt Payments _____ % | <input type="checkbox"/> Personal Use _____ % |
- _____ 3.) Part of the untaxed portion of the distribution was rolled over into an IRA/pension and part was received as a payment.
- Rollover amount: \$ _____ Payment amount: \$ _____
- The payment was utilized for:
- | | |
|---|---|
| <input type="checkbox"/> Medical Expenses _____ % | <input type="checkbox"/> Household Expenses _____ % |
| <input type="checkbox"/> Debt Payments _____ % | <input type="checkbox"/> Personal Use _____ % |
- _____ 4.) The entire taxed portion of the distribution was received as a payment. The payment was utilized for:
- | | |
|---|---|
| <input type="checkbox"/> Medical Expenses _____ % | <input type="checkbox"/> Household Expenses _____ % |
| <input type="checkbox"/> Debt Payments _____ % | <input type="checkbox"/> Personal Use _____ % |
- _____ 5.) Other: _____

**If one of the above items is checked, please attach a copy of the applicable
2021 1099-R tax form.**

Office of Student Financial Aid and Scholarships
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