



OHIO
UNIVERSITY
Financial Aid

**IRA/Pension/Annuity Distribution Form
2012-2013**

Office of Student Financial
Aid and Scholarships
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Athens, OH 45701-2979

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Student Name

Student PID (Pxxxxxxxxx)

Student Signature

Date

Parent Signature if applicable

Date

Your family's 2011 1040 form indicates an IRA, pension, or annuity was distributed in 2011. 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 in this manner: _____

- _____ 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 in this manner: _____

- _____ 4.) Other: _____
