Your family’s 2014 1040 form indicates an IRA, pension, or annuity was distributed in 2014. 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: ____________________________

______________________________________________

______________________________________________