### IRA/Pension/Annuity Distribution Form 2016 - 2017

<table>
<thead>
<tr>
<th>Student Name</th>
<th>Student PID (Pxxxxxxxxxx)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Signature</td>
<td>Date</td>
</tr>
<tr>
<td>Parent Signature if applicable</td>
<td>Date</td>
</tr>
</tbody>
</table>

Your family's 2015 1040 form indicates an IRA, pension, or annuity was distributed in 2015. 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:

If one of the above items is checked, please attach a copy of the applicable 2015 1099 tax form.