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 for:

- Medical Expenses ___%
- Household Expenses ___%
- Debt Payments ___%
- 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:

- Medical Expenses ___%
- Household Expenses ___%
- Debt Payments ___%
- Personal Use ___%

4.) Other: __________________________________________________________

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