

IRA/Pension/Annuity Distribution Form 2024-2025

Review the directions below and answer accordingly. Visit our website for directions on submitting your forms using our <u>Secure Upload Portal</u>, or by mail, or fax.

Written Student Signature (Electronic Signature Not Accepted) Written Parent Signature (Electronic Signature Not Accepted) (Parent signature required for dependent students)			S	Student PID (Pxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	
) 0		
				Date	
needed to determine of this form indicating	40 form indicates an IRA how the untaxed portion g how you used the early it was necessary to take	n of the distrik distribution o	oution was of your retir	utilized. Please com ement funds. Pleas	plete the bottom port e return it with a writ
1.) Th	e untaxed portion of the di	stribution was	rolled over i	nto an IRA/pension inv	estment.
2.) Th	e untaxed portion of the di	stribution was	received as	a payment. The payme	ent was utilized for:
	☐ Medical Expenses	%	□н	lousehold Expenses	%
	☐ Debt Payments	%	☐ P	Personal Use	%
	rt of the untaxed portion o ceived as a payment.	f the distribution	on was rolled	d over into an IRA/pens	sion and part was
	Rollover amount: \$		Payment	amount: \$	<u> </u>
	The payment was utilized	d for:			
	☐ Medical Expenses	%	□н	lousehold Expenses	%
	☐ Debt Payments	%	□Р	Personal Use	%
	ne entire taxed portion of t	he distribution	was receive	d as a payment. The pa	ayment was
	☐ Medical Expenses	%	□н	lousehold Expenses	%
	☐ Debt Payments	%	☐ P	ersonal Use	%
	hor.				
5.) Otl	ner:				

Office of Student Financial Aid and Scholarships Chubb Hall 020 1 Ohio University Drive

DO NOT SEND COMPLETED DOCUMENTS
BY EMAIL. PLEASE USE OUR SECURE
UPLOAD PORTAL OR SEND BY MAIL OR FAX.
https://www.ohio.edu/financial-aid/forms

Questions? financial.aid.verification@ohio.edu Phone: (740) 593-4141 Fax: (740) 593-4140

Athens, OH 45701-2979