IRA/Pension/Annuity Distribution Form
2021-2022

Review the directions below and answer accordingly. Visit https://www.ohio.edu/financial-aid/forms for directions on submitting your forms using our Secure Upload Portal, mailing, or faxing.

Student Name

Student PID (Pxxxxxxxxx)

Written Student Signature (Electronic Signature Not Accepted)

Date

Written Parent Signature (Electronic Signature Not Accepted)

Date

(Parent signature required for dependent students)

Your family’s 2019 1040 form indicates an IRA, pension, or annuity was distributed in 2019. 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.) The entire taxed portion of the distribution was received as a payment. The payment was utilized for:

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

5.) Other: ____________________________________________________________

If one of the above items is checked, please attach a copy of the applicable 2019 1099-R tax form.