



Review the directions below and answer accordingly. Visit our [website](#) for directions on submitting your forms using our Secure Upload Portal, or by mail, or fax.

Student Name

Student PID (Pxxxxxxxxx)

Written Student Signature (Electronic Signature Not Accepted)

Date

**Written Parent Signature (Electronic Signature Not Accepted)
(Parent signature required for dependent students)**

Date

Your family's 2023 1040 form indicates an IRA, pension, or annuity was distributed in 2023. Your assistance is needed to determine how the untaxed portion of the distribution was utilized. Please complete the bottom portion of this form indicating how you used the early distribution of your retirement funds. Please return it **with a written letter** explaining why it was necessary to take an early withdrawal of those funds, and a copy of the applicable 2023 1099-R tax form.

- _____ 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 written explanation and a copy of the applicable 2023 1099-R tax form.