IRA/Pension/Annuity Distribution Form 2026-2027

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) _____ **Date** _____
(Parent signature required for dependent students)

Your family's 2024 1040 form indicates an IRA, pension, or annuity was distributed in 2024. Your assistance is needed to determine how the taxed and 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 2024 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 2024 1099-R tax form.

Office of Student Financial Aid and Scholarships
Chubb Hall 020
1 Ohio University Drive
Athens, OH 45701-2979

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?
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