IRA/Pension/Annuity Distribution Form
2019-2020

Student Name ___________________________________________ Student PID (Pxxxxxxxxx) _____________________________

Student Signature ______________________________________ Date _____________________________

Parent Signature (if applicable) __________________________ Date _____________________________

Your family's 2017 1040 form indicates an IRA, pension, or annuity was distributed in 2017. 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 2017 1099 tax form.