

**WINTHROP UNIVERSITY
OFFICE OF FINANCIAL AID**

**UNTAXED IRA DISTRIBUTIONS/PENSIONS AND ANNUITIES
2019-2020**

Student's Name _____

Winthrop ID Number _____

**** This form should be completed by the parent who was listed on your FAFSA and completed the *Verification Form*****

Your FAFSA indicated that your parent(s) had untaxed pensions or IRA distributions reported on their 2017 federal tax return. The untaxed portion must be included on your FAFSA unless it was a rollover to another retirement plan. A rollover is a tax-free distribution of cash/assets switched from one retirement plan to another. Please confirm those amounts by filling in the information below:

IRA Distribution(if your parent had no IRA distribution in 2017 write **n/a** in each line below)

Enter the amount of IRA distributions from line **15a** of your parent's 2017 1040 tax return \$ _____
(or line 11a from 1040A)

Enter the amount of IRA distributions from line **15b** of your parent's 2017 1040 tax return \$ _____
(or line 11b from 1040A)

15a minus 15b equals \$ _____
(or line 11a minus 11b from 1040A)

How much of this was a **ROLLOVER** \$ _____

Pensions and Annuities(if your parent had no Pensions/Annuities distribution in 2017 write **n/a** in each line below)

Enter the amount of Pensions/Annuities from line **16a** of your parent's 2017 1040 tax return \$ _____
(or line 12a from 1040A)

Enter the amount of Pensions/Annuities from line **16b** of your parent's 2017 1040 tax return \$ _____
(or line 12b from 1040A)

16a minus 16b equals \$ _____
(or line 12a minus 12b from 1040A)

How much of this was a **ROLLOVER** \$ _____

By signing this worksheet, we certify that all of the information reported to qualify for federal student aid is complete and correct.

Student's Signature_____
Date_____
Parent's Signature_____
Date