

**WINTHROP UNIVERSITY
OFFICE OF FINANCIAL AID**

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

Student's Name _____ **Winthrop ID Number** _____

Your FAFSA indicated that you (or your spouse) had untaxed pension or IRA distribution reported on your 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 you [or your spouse] had no IRA distribution in 2017 write **n/a** in each line below)

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

Enter the amount of IRA distributions from line **15b** of your 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 [or your spouse] 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 2017 1040 tax return \$ _____
(or line 12a from 1040A)

Enter the amount of Pensions/Annuities from line **16b** of your 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

Spouse's Signature (optional)

Date