

**WINTHROP UNIVERSITY  
OFFICE OF FINANCIAL AID**

**UNTAXED IRA DISTRIBUTIONS/PENSIONS AND ANNUITIES  
2025-2026**

**Student's Name** \_\_\_\_\_ **Winthrop ID Number** \_\_\_\_\_

Your FAFSA indicated that you (or your spouse) had untaxed pension or IRA distribution reported on your 2023 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 2023 write **n/a** in each line below)

Enter the amount of IRA distributions from line **4a** of your 2023 1040 tax return \$ \_\_\_\_\_

Enter the amount of IRA distributions from line **4b** of your 2023 1040 tax return \$ \_\_\_\_\_

**4a minus 4b equals** \$ \_\_\_\_\_

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

**Pensions and Annuities**

(if your [or your spouse] had no Pensions/Annuities distribution in 2023 write **n/a** in each line below)

Enter the amount of Pensions/Annuities from line **5a** of your 2023 1040 tax return \$ \_\_\_\_\_

Enter the amount of Pensions/Annuities from line **5b** of your 2023 1040 tax return \$ \_\_\_\_\_

**5a minus 5b equals** \$ \_\_\_\_\_

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**

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**Securely upload forms through Wingspan (Financial Aid, Student, Financial Aid, Document Upload)**