

**WINTHROP UNIVERSITY  
OFFICE OF FINANCIAL AID**

**UNTAXED IRA DISTRIBUTIONS/PENSIONS AND ANNUITIES  
2023-2024**

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 2021 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 2021 write **n/a** in each line below)

Enter the amount of IRA distributions from line **4a** of your parent's 2021 1040 tax return \$ \_\_\_\_\_

Enter the amount of IRA distributions from line **4b** of your parent's 2021 1040 tax return \$ \_\_\_\_\_

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

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

**Pensions and Annuities**

(if your parent had no Pensions/Annuities distribution in 2021 write **n/a** in each line below)

Enter the amount of Pensions/Annuities from line **5a** of your parent's 2021 1040 tax return \$ \_\_\_\_\_

Enter the amount of Pensions/Annuities from line **5b** of your parent's 2021 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

\_\_\_\_\_  
Parent's Signature

\_\_\_\_\_  
Date