

**WINTHROP UNIVERSITY
OFFICE OF FINANCIAL AID**

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

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

Your FAFSA indicated that you (or your spouse) had untaxed pension or IRA distribution reported on your 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 you [or your spouse] had no IRA distribution in 2021 write **n/a** in each line below)

Enter the amount of IRA distributions from line **4a** of your 2021 1040 tax return \$ _____

Enter the amount of IRA distributions from line **4b** of your 2021 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 2021 write **n/a** in each line below)

Enter the amount of Pensions/Annuities from line **5a** of your 2021 1040 tax return \$ _____

Enter the amount of Pensions/Annuities from line **5b** of your 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

Spouse's Signature (optional)

Date

Sykes House, 638 Oakland Ave, Rock Hill, SC 29733
(803) 323-2189 (phone) – (803) 323-2557 (fax) – finaid@winthrop.edu

Revised 12/05/22

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