



OHIO
UNIVERSITY

Financial Aid

IRA/Pension/Annuity Distribution Form 2009-2010

Office of Student Financial
Aid and Scholarships
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Athens, OH 45701-2979

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Student Name

Student PID (P00xxxxxxx)

Student Signature



Date

Parent Signature if applicable



Date

Your family's 2008 1040 form indicates an IRA, pension, or annuity was distributed in 2008. Your assistance is needed to determine how the untaxed portion of the distribution was utilized. Please complete the bottom portion of this letter by marking the usage of your distribution and return it to our office.

_____ The untaxed portion of the distribution was rolled over into an IRA/pension investment.

_____ The untaxed portion of the distribution was received as a payment. The payment was utilized in this manner:

_____ Part of the untaxed portion of the distribution was rolled over into an IRA/pension and part was received as a payment.

Rollover amount: _____

Payment amount: _____

The payment was utilized in this manner:

_____ Other: _____
