

Financial Aid | finaid@nwtc.edu
 2740 W Mason Street
 Green Bay WI 54307-9042
 Phone: 920-498-5444 • Fax: 920-491-2619

 First Name Last Name

Student ID: _____

2019-20 IRA/Pension Rollover Statement

Distributions from pensions, annuities, and other similar accounts are usually reported on IRS Form 1099-R. Federal regulations state that when receiving a lump-sum distribution, it can be rolled over into another qualified retirement plan or IRA and retain the tax-deferred status.

Please review your individual tax return and complete the table below if all or some of an IRA/Pension has been rolled over in 2017.

	Amount of Rollover
Untaxed IRA Distributions IRS Form 1040 (line 15a minus 15b) IRS Form 1040A (line 11a minus 11b)	\$
Untaxed Pensions and Annuities IRS Form 1040 (line 16a minus 16b) IRS Form 1040A (line 12a minus 12b)	\$

Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

 Student's Signature

 Date

 Parent's Signature (Dependent Student)

 Date

Electronic signatures are not accepted. Please watch your NWTC email for your next communication.

Failure to submit the requested information may prevent processing of your financial aid.