

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: _____

2020-21 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 2018.

	Amount of Rollover
Untaxed IRA, Pensions, and Annuities Distributions <small>IRS Form 1040 (line 4a minus 4b)</small>	\$ _____

Certification and Signatures

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.