

**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: \_\_\_\_\_

### 2022-23 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 2020.

	Amount of Rollover
<b>Untaxed IRA, Pensions, and Annuities Distributions</b> <small>IRS Form 1040 (line 4a minus 4b or 5a minus 5b)</small>	\$ _____

I did not have a Rollover in 2020

### 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/Parent's Signature for Dependent Student

\_\_\_\_\_  
Date

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