



2020-2021 Pension and Annuity Form

Office of Student Financial Aid
University of Illinois at Urbana-Champaign
620 East John Street – MC 303
Champaign, IL 61820-5712
Fax (217) 265-5516 Phone (217) 333-0100

Student Name: _____
Last First MI

UIN: _____
(Number on I-Card or Admissions Letter)

We have reviewed your parent(s)/stepparent's and/or your and/or your spouse's (if married) 2018 IRS Tax Return information that was submitted to our office. The document indicated that in 2018 there were IRA distributions and/or pensions and annuities of which all or a portion had not been taxed during 2018.

Generally, distributions from pensions, annuities, profit-sharing and retirement plans, IRAs, insurance contracts, etc., are reported to you on Form 1099-R. Federal Regulations state that if you receive a lump-sum distribution from a pension, annuity, profit-sharing or retirement plan, IRA, Insurance contract, etc., you can roll over the distribution into another qualified retirement plan or IRA and keep it in a tax-deferred status. These rolled over funds should not be reported on the FAFSA as untaxed income.

Listed below is the type of distribution received. Please indicate if all, some or none of the distribution was reinvested, then sign this form and submit it to our office.

IMPORTANT! If some or all of the distributions were reinvested, please attach documentation from the financial institution handling the investment to show the amount reinvested or submit your 1099-R.

Type of Distribution	Total Amount	Taxable Amount	Untaxed Amount	Amount of Distributions Reinvested
IRAs, pensions, and annuities	\$ _____	\$ _____	\$ _____	<input type="checkbox"/> All <input type="checkbox"/> Some \$ _____ <input type="checkbox"/> None

Note: (for point of reference) Individual Retirement Account (IRA) distributions and Pensions are taken from 2018 IRS Form 1040 Lines 4a and 4b.

I certify that ALL of the information on this form is complete and correct.

 Student Signature Date

 Parent Signature (Required for dependent students) Date

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

Completed documents should be uploaded directly to UI-Integrate Self-Service. For instructions on how to access and upload documents please visit <https://osfa.illinois.edu/DocumentUpload>. Be sure to include your name and UIN on all documents uploaded. After you have uploaded your documents, you may confirm receipt within 3 business days at <https://osfa.illinois.edu/process/checking-your-status>. If you have any questions, please visit our website www.osfa.illinois.edu, contact a member of our counseling staff at (217) 333-0100 or email finaid@illinois.edu. **Please do not email documents to this email address.**