
2021-22 Qualified IRA/Pension Rollover Statement (Parent)

Student Name

SSU I.D.

Instructions to Parent:

Review the Form 1099-R (Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.) that was issued to you for the 2019 tax year which shows the non-taxable, qualified rollover that appears on your federal tax return.

Individual Retirement Account (IRA) and Pension rollovers that appear on (lines 4a+4c) - (lines 4b+4d) of your 1040 federal tax return.

Enter the amount of the qualified IRS rollover in the space below. The amount is the difference between box 1 (Gross distribution) and box 2a (Taxable amount) on the Form 1099-R. Complete the Sign This Statement box below and return this form to our office.

Attach a photocopy of the 1099-R form to this form.

STATEMENT

The amount of my 2019 authorized IRS Rollover is:

Sign This Statement

I certify that all the information reported on this form is complete and correct.

Parent Name (please print)

Phone number

Parent Signature

Date