



Financial Aid Office
 1801 East Cotati Avenue
 Rohnert Park, CA 94928

finaid@sonoma.edu
sonoma.edu/finaid
 Telephone: (707) 664-2389
 Fax: (707) 664-4242

2019-20 Qualified IRA/Pension Rollover Statement (Student)

Student Name

SSU I.D.

Instructions to Student:

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 2018 tax year which shows the non-taxable, qualified rollover that appears on your federal tax return.

Individual Retirement Account (IRA) and Pension rollovers appear on line 4a 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 non-taxable distribution on my 2018 federal income tax return that is an authorized IRS rollover is:

Sign This Statement

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

 Student Name (please print)

 Phone number

 Student Signature

 Date