

Student Name: _____

Banner ID#: 800 _____

2024/25 – V10



Financial Aid

SUNY BROCKPORT

Your 2022 Federal Tax Return shows that you may have had untaxed portions of IRA Distributions or untaxed portions of pensions. See the chart below to determine untaxed amounts.

Form Type	IRA Distribution	Pension
Form 1040	4a minus 4b	5a minus 5b

Was the difference actually received in 2022 or rolled-over into another account? Please complete the information below and return this form to the Financial Aid Office. We cannot continue processing your financial aid until this document has been received.

Thank you,

The Financial Aid Office

Please check the appropriate box:

The \$_____ as indicated above was: ☐ Actually received in 2022 (non-taxed income)

OR

☐ Rolled-over into another account

Student's signature: _____ Date: _____

Spouse's signature (if applicable): _____ Date: _____

V10 (3/28/2024)