



Student Name: _____ ID #: _____

We are requesting this form because either the Parent or Student reported an IRS or Pension Rollover on the FAFSA. Complete the form using your 2022 federal tax return and submit to the Financial Aid Office.

The information submitted is for the: **Student** _____ **Student's Parent** _____

PART 1: IRA DISTRIBUTIONS

Enter the amount from IRS Form 1040, Line 4a (IRA distributions) \$ _____

Enter the amount from IRS Form 1040, Line 4b (taxable amount) \$ _____

Was this IRA distribution a rollover? (Yes/No) _____

 If Yes, what amount was a rollover into another qualified retirement plan? \$ _____

PART 2: PENSION/ANNUITY DISTRIBUTIONS

Enter the amount from IRS Form 1040, Line 5a (pension/annuity distributions) \$ _____

Enter the amount from IRS Form 1040, Line 5b (taxable amount) \$ _____

Was this pension/annuity distribution a rollover? (Yes/No) _____

 If Yes, what amount was a rollover into another qualified retirement plan?) \$ _____

PART 3: CERTIFICATION

By signing this form, I certify all information reported on this form and within the enclosed documentation is complete and correct. I understand that providing false or misleading information may result in a fine, a prison sentence, or both, according to Higher Education Act of 1965, as amended, Section 490(a). Any false or misleading information is subject to cancellation of all financial assistance.

Digital signatures are not accepted.

Signature of the Tax Filer with the Rollover: _____

Date: _____