

2025-2026 IRA/PENSION ROLLOVER VERIFICATION FORM

Student Name _____ Student ID # _____

As part of your 2025-2026 financial aid application, your parent indicated an amount of untaxed IRA or pension distributions received in 2023. The untaxed portion of an IRA or pension distribution must be reported as untaxed income on the FAFSA unless it was a rollover into another qualified retirement plan.

Use your 2023 Federal Income Taxes to complete one or both sections that apply below. Enter "o" for any items that do not apply.

For IRA distributions:

1. Enter the amount from IRS Form 1040 line 4a (IRA distributions) \$ _____
2. Enter the amount from IRS Form 1040 line 4b (Taxable amount) \$ _____
3. Was this IRA distribution a rollover? ☐ YES ☐ NO
4. If yes, what amount was a rollover into another qualified retirement plan? \$ _____

For pension/annuity distributions:

1. Enter the amount from IRS Form 1040 line 5a (pension/annuity distributions) \$ _____
\$ _____
2. Enter the amount from IRS Form 1040 line 5b (Taxable amount)
3. Was this pension/annuity distribution a rollover? ☐ YES ☐ NO \$ _____
4. If yes, what amount was a rollover into another qualified retirement plan?

CERTIFICATION: One parent whose information was reported on the 2025-2026 FAFSA must sign.
Please note that Digital/Electronic signatures will not be accepted.

I certify that all the information reported on this form is true, complete, and accurate to the best of my knowledge. I understand that any false statements could be cause for denial, reduction, withdrawal, or repayment of federal or institutional financial aid.

Parent Signature

Date