



Division of Student Affairs
Office of Financial Aid

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2023-2024 IRA/Pension Rollover Statement

Clarification of IRA, pension, or annuity information is needed to complete the Verification of your financial aid application. The untaxed portion of an IRA, pension, annuity must be included as untaxed income on your FAFSA unless it was a rollover. For your reference, a rollover is described as the following: Untaxed portions of IRA distributions and portions are reported as lines 4a minus 4b on the 1040.

- The IRS Pension, or Annuity WAS a rollover. Attach documentation (EX. A signed and dated written statement from the tax filer indicating the IRS-authorized rollover amount or a signed and dated copy of the 2021 Tax Return Transcript or alternative tax transcripts with the word “rollover” handwritten next to the applicable line items.)
- The IRA, pension, or annuity WAS NOT a rollover.
- The IRA, pension, or annuity was a rollover to a Roth IRA.

Note: If you/your parents rolled over a traditional IRA into a Roth IRA by transferring funds, the amount rolled over is reported as taxable income on the tax return. You can complete a Financial Aid Special Circumstance form to reduce the income and taxes paid due to the rollover. Please contact our office for additional information.

A. Certification and Signatures

I (we) understand that the information provided on this FAFSA Verification Worksheet is complete and accurate. I (we) understand that intentionally providing false, inaccurate or misleading information can result in federal penalties.

Student’s Signature

Date

Parent’s Signature

Date

Sign, date this worksheet and all required documents, and then upload the worksheet and documents to your student SFP Portal: