



Division of Student Affairs  
Office of Financial Aid

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## 2025-2026 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, **or** 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 **2023** 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.

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### 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.

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Student's Signature

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Date

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Parent's Signature

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Date

Sign, date, and upload this worksheet and all required documents to your student SFP Portal.