



2026-2027 Federal Verification – IRA/Pension Rollover Documentation Form

Student Name

Student ID

As part of your 2026-2027 financial aid application, an amount of untaxed IRA or pension distributions received in 2024 was indicated. 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 2024 Federal Income Taxes to complete one or both sections that apply below. Enter "0" 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 2026-2027 FAFSA must sign with an ink signature below. If you are an independent student or student's spouse who had a rollover, you must sign with an ink signature below.

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, withdrawals, or repayment of federal or institutional financial aid.

Parent Signature
(required for dependent students)

Date

Student/Spouse Signature
(Required for independent students)

Date