



**2023-2024 Parent IRA and Pension/Annuity Rollover  
Tax Year: 2021**

Student Name: \_\_\_\_\_ Student ID#: \_\_\_\_\_

Parent Name: \_\_\_\_\_

**Parent: complete the below for you (and your spouse). Do not leave blanks; write "0" if an item is zero dollars.**

The untaxed portion of any IRA or pension/annuity distribution must be reported as untaxed income on the Free Application for Federal Student Aid or FAFSA ***unless it was a rollover*** into another qualified retirement plan. If you used the IRS Data Retrieval Tool to load 2021 income information from the IRS when completing the 2023-2024 FAFSA, you were prompted to enter the amount of rollover funds.

To confirm rollover amounts, review your 2021 federal tax return and complete the section below. Indicate the amount which was "rolled over" into another qualified retirement plan.

Untaxed portions of IRA distributions and pensions can be found using:

	<b>Amount from IRS Form 1040: (lines 4a + 5a) minus (lines 4b + 5b)</b>	<b>Amount of total that was a rollover**</b>
Untaxed portions of IRA distributions and pensions:		

**\*\*If you indicated that some funds were rolled over, attach documentation showing the rollover: either a document from the financial institution handling the investment that reflects the reinvestment or a copy of your 1099-R.**

I certify all information reported for the above student to qualify for federal student aid is complete and correct and I have attached documentation (if a rollover is being reported).

By signing this worksheet, I certify that all the information reported on it is complete and correct. If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both. **Note: We may request additional documentation if we have reason to believe any of the information on this form is inaccurate.**

\_\_\_\_\_  
Parent Signature

\_\_\_\_\_  
Date