2025-2026 ROLLOVER CONFIRMATION FORM

The Free Application for Federal Student Aid (FAFSA) requires you to report your (and your spouse's or parent(s)', if applicable) untaxed pension or IRA distributions that were "rollovers" from one account to another in 2023. For the 2023 tax year, the untaxed portion of IRA distributions is reported on 1040 lines 4a minus 4b, and the untaxed portion of pension and annuity distributions are reported on 1040 lines 5a minus 5b. Sometimes, these amounts are "rolled over" into another qualified IRA, pension, or annuity plan, so these rollover amounts are not actually received by the tax payer as untaxed income.

In order to verify the rollover amounts reported on the 2025-2026 FAFSA, you must complete and submit this signed statement confirming your (and your spouse's or parent(s)', if applicable) rollover values for 2023.

STUDENT INFORMATION

Last Name _____ First Name _____ M.I. _____ Student I.D. _____

ROLLOVER INFORMATION

Please report each of the following rollover values for 2023. If an area does not apply to you, your parent(s), or spouse (if applicable), please write $0. You must fill in all of the boxes below with a dollar value or $0.

Rollover Type	Student	Parent or Spouse (if applicable)
Untaxed portions of IRA distributions that were <u>rollovers</u> into another IRA or qualified plan Total untaxed portions of IRA distributions are calculated by subtracting IRS Form 1040 line 4a minus line 4b. Some or all of this amount may be a rollover. Rollover amounts may be indicated by "Rollover" written on the 1040 near line 4, or can be calculated using IRS Form 1099-R by subtracting box 2a from box 1 and treating the difference as a rollover if there is a code "G" or "H" in box 7.		
Untaxed portions of pensions that were <u>rollovers</u> into an IRA or other qualified plan Total untaxed portions of pensions are calculated by subtracting IRS Form 1040 line 5a minus line 5b. Some or all of this amount may be a rollover. Rollover amounts may be indicated by "Rollover" written on the 1040 near line 5, or can be calculated using IRS Form 1099-R by subtracting box 2a from box 1 and treating the difference as a rollover if there is a code "G" or "H" in box 7.		

CERTIFICATIONS AND SIGNATURES

Each person signing below certifies that all of the information reported on this form is complete and correct. If the student provided parental information on the FAFSA, at least one parent whose information was reported on the FAFSA must sign below.

Warning: If you purposely give false or misleading information, you may be fined, sent to prison or both.

_____ _____

Student Signature (No Digital Signatures) **Date**

_____ _____

Parent Signature (if applicable) (No Digital Signatures) **Date**