

2021-2022 IRA/Pension Rollover Worksheet

A. Student Information

Last Name: _____ First Name: _____ MI: _____

NSHE ID: _____

B. Rollover Information

Your Free Application for Federal Student Aid (FAFSA) indicates that someone in your household received an IRA, pension plan, or annuity distribution in 2019 that included a Rollover. While traditional distributions from an IRA, pension plan, or annuity are considered untaxed income on the FAFSA, qualified Rollovers do not have to be reported.

Determining the Amount of a Rollover:

1. If there are qualified rollovers, the IRS guidance tells the tax filer to enter the word "Rollover" on the original tax return next to the following lines: IRS Form 1040: (lines 4a + 4c) minus (lines 4b + 4d)

OR

2. Refer to IRS form 1099-R, Box 7, Code G or H

Please provide the following information confirming that the IRA or pension distributions reported on your FAFSA included a rollover

Individual who Received a Rollover in 2019	Relationship to Student (example: self, parent, spouse)	Amount of Rollover

C. Certification

I certify the information on this form is accurate and complete to the best of my knowledge. I understand any false information will be cause for denial, reduction, or repayment of financial aid. I will provide other documentation or information requested by an authorized official. I understand my federal aid eligibility cannot be evaluated without this information.

Student Signature: _____ Date: _____

Parent Signature: _____ Date: _____