



Student Financial Services

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SPU.EDU/SFS

2025-26 IRA/PENSION ROLLOVER FORM

STUDENT NAME: _____ SPU ID: _____

As part of your 2025-26 FAFSA, an amount of untaxed IRA or pension distributions for 2023 was listed. 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.

Refer to your 2023 Federal Income Tax Return to complete the information below. Enter "0" for any items that do not apply.

Your relationship to the Student: _____

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? \$ _____

Verification Documentation (must submit one of the following)

- 1. Attach a signed and dated written statement from the tax filer confirming the IRS-authorized rollover amount confirmed above.
- 2. A copy of the Tax Return Transcript or alternative tax transcript with the word "rollover" handwritten; or A signed and dated copy of the 1040 tax return that was filed with the IRS with the word "rollover" handwritten or typed next to the applicable line items.

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

Signature

Date