

## 2026-2027 IRA/Pension Rollover Verification

STUDENT NAME:	STUDENT ID #: C70
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Current students only^

As part of your 2026–2027 Free Application for Federal Student Aid (FAFSA), your parent reported an amount of untaxed IRA or pension distributions received in 2024. The untaxed portion of an IRA or pension distribution must be reported as untaxed income on the FAFSA unless it was rolled over into another qualified retirement plan.

**Please use your 2024 Federal Income Tax Return to complete one or both sections below. Enter "N/A" for any items that do not apply.**

For IRA distributions:

1. Amount from IRS Form 1040, line 4a (IRA distributions): \$ \_\_\_\_\_
2. Amount from IRS Form 1040, line 4b (Taxable amount): \$ \_\_\_\_\_
3. Was this IRA distribution a rollover?  Yes  No
4. If yes, what amount was rolled over into another qualified retirement plan?  
\$ \_\_\_\_\_

For pension/annuity distributions:

1. Amount from IRS Form 1040, line 5a (pension/annuity distributions): \$ \_\_\_\_\_
2. Amount from IRS Form 1040, line 5b (Taxable amount): \$ \_\_\_\_\_
3. Was this IRA distribution a rollover?  Yes  No
4. If yes, what amount was rolled over into another qualified retirement plan?  
\$ \_\_\_\_\_

*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.*

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

NOTE: Signatures *cannot* be typed.

SUBMISSION:	
Prospective Students	Financial Aid Portal
Current Students	CUWeb