Student: complete the below for you (and your spouse).

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. However if you used the IRS Data Retrieval Tool to load 2013 income information from the IRS when completing the 2014-2015 FAFSA, it would not recognize a rollover and thus would overstate the amount of untaxed income.

To address this, review your 2013 federal tax return and complete the section below. Indicate the amount which was “rolled over” into another qualified retirement plan. Do not leave blanks; write “0” if an item is zero dollars.

**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 to qualify for federal student aid is complete and correct and I have attached documentation (if a rollover is being reported).

SUBMIT THIS COMPLETED FORM TO YOUR CAMPUS STUDENT AFFAIRS OFFICE.

Questions? Contact your Student Affairs Office.