**Please turn in ALL Verification Documents AS SOON AS POSSIBLE.
Financial Aid will NOT PAY OUT until verification is COMPLETE.

2026
FA V PARENT UNTAXED IRA PENSION
F0PU_E

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

PARENT UNTAXED IRA PENSION

The untaxed portion of an IRA, pension or annuity must be included as untaxed income on your financial aid application unless it was a rollover to another retirement plan. A "rollover" is a tax-free distribution of cash or other assets switched from one retirement plan to another. Your parent(s) federal tax return does not specify if the amount was a rollover; therefore, refer to your parent's 2023 Federal Tax Return and enter the amounts from the appropriate lines below. Specify whether each was a rollover, a distribution paid to your parent(s) (not a rollover), a rollover to a ROTH IRA or a life insurance policy. If you are unsure, please contact your tax preparer.

Rollover or Distribution - If there is a dollar amount on your 2023 Federal tax return for IRA Distributions and Pensions and Annuities **(1040 lines 4a + 5a) minus (1040 lines 4b + 5b)**. Please indicate whether these funds were the result of a rollover, distribution or Life insurance policy. A "rollover" is a tax-free distribution of cash or other assets moved from one retirement plan to another. If you are unsure if it was a rollover, please contact your tax preparer:

_____The IRA, pension or annuity WAS a "rollover" (you did not receive the money).
Submit Distribution Form 1099 with this worksheet.
_____The IRA, pension or annuity WAS NOT a "rollover" (you did receive the money).
_____The IRA was a rollover to a Roth IRA.
_____The amount was from a Life Insurance policy.
Explanation:_____
_____
_____
_____

(Signatures MUST BE Handwritten)

_____ _____
Signature of Parent Date

By signing this worksheet, I certify that all the information reported on this worksheet is complete and correct.
As a reminder, students and parents should never send personally identifiable information, such as Social Security Numbers, via email.