

Request for IRA, Pension, and Annuity Rollover Review (2025–26)

Warning: According to the U.S. Department of Education, if you purposely give false or misleading information, you may be subject to a fine of up to \$20,000, imprisonment for up to five years, or both.

Student Information (Please Print)

Last Name: First Name:

Middle Initial: Student ID Number:

Student Email Address:

Street Address
(Include Apartment Number):

City: State: Zip Code:

Phone Number (Include Area Code):

Instructions

Please complete this form if all or some of your or your contributor(s) IRA or Pension has been rolled over (or your spouse's if you are married), and the rolled over amount is showing on your 2025-26 FAFSA as untaxed IRA distributions or untaxed pensions.

Federal Regulations state that if you receive a lump-sum distribution from a pension, annuity, profit-sharing or retirement plan, IRA, Insurance contract, etc., you can roll over the distribution into another qualified retirement plan or IRA and keep it in a tax-deferred status. These rolled over funds should not be reported on the FAFSA as untaxed income, however if you used the IRS Data Retrieval when completing the FAFSA, the retrieval tool would not recognize the rollover.

Untaxed IRA/Pensions and Annuities distributions may be calculated using: 2023 IRS Form 1040 (line 4a plus 5a) minus (4b plus 5b).

Please review your individual tax return, indicate if all or some of the distribution was reinvested. Attach the documents showing the rollover, then sign and date this form and submit to the Financial Aid office.

Please attach documentation from the financial institution handling the investment to show the amount reinvested or attach your 1099-R for 2023.

Distribution on Tax Return	Total Amount (Line 4a + 5a)	Taxable Amount (Line 4b + 5b)	Untaxed Amount (Total Amount – Taxable Amount)	Amount of Distributions Reinvested
IRA/Pension and Annuity	\$	\$	\$	\$

Certification and Signature

Please provide your signature. If you are a dependent student, please also provide one contributor's signature whose information is listed on your FAFSA. By providing signature(s), you are certifying that all of the information on this form is complete and correct. You are also authorizing Central Piedmont Community College to make corrections to your original and/or subsequent applications based on the documents you are now submitting.

Student Signature: _____ Date: _____

Contributor Signature
(Dependent Students Only): _____

Date: _____