UNIVERSITY OF Redlands

2026-2027 Student or Parent IRA/Pension Rollover Verification Form

Student Financial Services

Student Name: ____________________________________ Redlands ID: _______________________

You indicated on your 2026-2027 FAFSA 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 a rollover into another qualified retirement plan.

Please review your 2024 federal tax return and complete the section below. Indicate the amount which was rolled over into another qualified retirement plan. If the answer is none, please write zero.

Untaxed IRA or Pension Distribution may be calculated using: IRS Form 1040 (lines 4a +5a) minus (lines 4b +5b)

	Total from 2024 Federal Tax Return	**Total Amount that was a Rollover****
Untaxed IRA or Pension Distributions		

** If you indicated that some funds were rolled over, please provide a copy of the 2024 IRS Form 1099-R to verify the amount that was rolled over.

I certify that all information on this form is complete and correct.

Student Signature ____ Date ______________________

Print Parent Name ____

Parent Signature____ Date ______________________

Parent email address ____

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