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## 2023-2024 IRA/Pension Rollover Form

### A. Student Information

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ MI: \_\_\_\_\_

NSHE: \_\_\_\_\_

### B. Rollover Information

Your Free Application for Federal Student Aid (FAFSA) indicates that someone in your household received an IRA, pension plan, or annuity distribution in 2021 which included a Rollover. While traditional distributions from an IRA, pension plan, or annuity are considered untaxed income on the FAFSA, qualified Rollovers do not have to be reported. Please upload this completed document to a case in the [Rebel Success Hub \(Formerly known as the Self-Service Help Center\)](#) at [unlv.today/service](#).

Determining the Amount of a Rollover:

1. If there are qualified rollovers, the IRS guidance to the tax filer is to enter the word "Rollover" on the original tax return next to the following lines: IRS Form 1040: (lines 4a + 5a) minus (lines 4b + 5b)

OR

2. Refer to IRS form 1099-R, Box 7, Code G or H

Please provide the following information confirming that the IRA, pension or annuity distributions reported on your FAFSA included a rollover for the 2021 tax year.

Individual Who Received a Rollover in 2021	Relationship To Student (self, parent, spouse)	Amount of Rollover
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

### C. Signature

By signing this form, I certify that all information is complete and accurate.

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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