



2023-2024 Request for Pension and Annuity Rollover Review

Student Name: _____ Student ID# _____
 (Print your full name)

Please complete this form if all or some of your (or your spouse's if you are married) IRA or Pension has been rolled over and the rolled over amount is showing on your 2023-24 FAFSA as untaxed IRA distributions or untaxed pensions. Please provide your parent(s) information if you are a dependent student.

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 portions of IRA distributions and pensions are taken from IRS Form 1040 – line 4a minus 4b. Please review your or (your spouse's) or (your parent's) individual tax return, indicate if all or some of the distribution was reinvested, sign, and date.

Student (Spouse):

Type of Distribution on Tax Return	Total Amount	Taxable Amount	Untaxed Amount	Amount of Distributions Reinvested
IRA DISTRIBUTIONS	\$ _____	\$ _____	\$ _____	<input type="checkbox"/> ALL <input type="checkbox"/> SOME \$ _____
PENSIONS AND ANNUITIES	\$ _____	\$ _____	\$ _____	<input type="checkbox"/> ALL <input type="checkbox"/> SOME \$ _____

Parent:

Type of Distribution on Tax Return	Total Amount	Taxable Amount	Untaxed Amount	Amount of Distributions Reinvested
IRA DISTRIBUTIONS	\$ _____	\$ _____	\$ _____	<input type="checkbox"/> ALL <input type="checkbox"/> SOME \$ _____
PENSIONS AND ANNUITIES	\$ _____	\$ _____	\$ _____	<input type="checkbox"/> ALL <input type="checkbox"/> SOME \$ _____

Print Student's Name	Student's ID Number
Student's Signature (Required)	Date
Parent's Signature (If Dependent)	Date

Please return this completed form to:
 Piedmont Community College
 Financial Aid Office
 PO Box 1197
 Roxboro, NC 27573