2024-2025
Verification of Untaxed IRA/Pension Rollover

Student ID Number: _____ Email: _____

Student's
Full Legal Name: _____
(**Please print clearly**) **Last** **First** **Middle**

Instructions: You reported an amount of untaxed IRA or pension distributions received in 2022 on your 2024-2025 FAFSA. According to federal financial aid guidelines, any untaxed portion of an IRA or pension distribution must be reported as untaxed income on the FAFSA **unless it was rolled over into another qualified retirement plan**.

1. Did any portion of this IRA or pension distribution qualify as a rollover into another qualified retirement plan?

☐ Yes
☐ No

2. If "Yes," please enter the total amount that was rolled over in the chart below. If "No," please enter $0.

Distribution Type	Total Amount (*IRS Form 1040 Line 4a + Line 5a*)	Taxable Amount (*IRS Form 1040 Line 4b + Line 5b*)	Untaxed Amount (*IRS Form 1040 Line 4a-4b + 5a-5b*)	Untaxed Portion Reinvested (Rollover)
IRA, Pension, or Annuity Distribution(s)	**$**	**$**	**$**	**$**

4. Documentation Requirement:

Please provide a copy of IRS Form 5498 to confirm the rollover amount. This form reports contributions, including rollovers, to retirement accounts and will help verify the rollover amount. If a rollover occurred, you should have received Form 5498 from your financial institution for the 2022 tax year. If you no longer have this form, contact your financial institution to request a copy.

Student Signature: _____ **Date:** _____
No electronic or typed signatures

Parent Signature: _____ **Date:** _____
No electronic or typed signatures

For the security of your personal information, the Virginia Tech Office of University Scholarships and Financial Aid does not accept completed forms sent via email. Please return completed forms to us via the document uploader, https://finaid.vt.edu/documentuploader.html

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