

Instructions: Use this form to certify the amount of untaxed IRA/Pension and annuity listed on your 2026-27 FAFSA that was a rollover. The untaxed portion of an IRA, pension or annuity must be included as untaxed income on your financial aid application unless it was a rollover to another qualified retirement plan. A “rollover” is a tax-free distribution of cash or other assets switched from one retirement plan to another.

Student Information

Last Name: _____ First Name: _____

ctcLink ID: _____

IRA Distributions/Pensions and Annuities

Please indicate whose information is being reported on this form: _____ Student _____ Spouse _____ Parent(s)

Refer to your/your parent's 2024 Federal Tax Return and enter the amounts from the appropriate lines on the table below. Specify if all or some of the untaxed distribution was reinvested in another qualified retirement plan or IRA.

| <i>Distribution Type</i> | <i>Total Amount IRS Form 1040 – line 4a</i> | <i>Taxable Amount IRS Form 1040 – line 4b</i> | <i>Untaxed Amount Total minus Taxable</i> | <i>Amount of Distributions Reinvested (Rollover)</i> |
|--|---|---|---|--|
| <i>IRA Distribution(s)</i> | \$ _____ | \$ _____ | \$ _____ | <i>All</i> <i>Partial \$ _____</i> |
| <i>Pension and Annuity Distribution(s)</i> | \$ _____ | \$ _____ | \$ _____ | <i>All</i> <i>Partial \$ _____</i> |

Certification and Signature:

I certify that the information provided in this application and other financial aid documents is true and correct to the best of my knowledge. I understand that purposely giving false or misleading information, may result in a referral to the Office of the Inspector General and/or be liable to repay all aid received.

Each person signing this worksheet certifies that all the information reported on it is complete and correct. **Note: Signatures cannot be typed.**

Student Signature _____ Date: _____

Parent Signature (Dependent students only) _____ Date: _____