

2016-2017 Request for Pension and Annuity Rollover Review



Office of Student Financial Aid
University of Illinois at Urbana-Champaign
620 East John Street – MC 303
Champaign, IL 61820-5712
Fax (217) 265-5516 Phone (217) 333-0100

Student Name: _____
Last
First
MI

UIN: _____
(Number on I-Card or Admissions Letter)

Generally, distributions from pensions, annuities, profit-sharing and retirement plans, IRAs, insurance contracts, etc., are reported to you on Form 1099-R. 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 Tool when completing the FAFSA, it would not recognize the rollover.

Please complete this form if all or some of your or your parent(s) IRA or Pension has been rolled over.

IRA distributions are taken from lines 15a and 15b of the IRS form 1040 or lines 11a and 11b on the 1040A. The Pensions and annuities are taken from lines 16a and 16b of the IRS form 1040 or lines 12a and 12b of the IRS form 1040A. Please review your individual tax return, indicate if all or some of the distribution was reinvested, attach the documents showing the rollover, then sign and either fax this and supporting documentation to (217) 265-5516 or mail it to the address listed above.

IMPORTANT! Please attach documentation from the financial institution handling the investment to show the amount reinvested or submit your 1099-R.

Type of Distribution	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 \$ _____

****Please note – We may request further documentation, such as a Federal Tax Transcript, if the amount(s) of the fund(s) seem inconsistent.**

I certify that ALL of the information on this form is complete and correct.

 Student Signature Date

 Parent Signature (Required for dependent students) Date

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

Documents may be faxed to 217-265-5516 or mailed to the address at the top of this letter. You will be able to view receipt of faxed documents online within three business days and receipt of mailed documents within one week. To check the status of submitted documents go to www.osfa.illinois.edu and click on "Check Your Status." If you have any questions, please contact a member of our counseling staff at 217-333-0100.