REQUEST FOR PENSION AND ANNUITY ROLLOVER REVIEW

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 you 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.

**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

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.

www.osfa.illinois.edu Email: finaid@illinois.edu Fax: (217) 265-5516