2019-2020
Request for Pension and Annuity Rollover Review Form

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 parent(s)'/stepparent’s and/or your and/or your spouse’s (if married) 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 on this form, attach the documents showing the rollover and submit to our office.

**Please note – We may request further documentation, such as a Federal Tax Return 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

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

<table>
<thead>
<tr>
<th>Type of Distribution</th>
<th>Total Amount</th>
<th>Taxable Amount</th>
<th>Untaxed Amount</th>
<th>Amount of Distributions Reinvested</th>
</tr>
</thead>
<tbody>
<tr>
<td>IRA Distributions</td>
<td>$___________</td>
<td>$___________</td>
<td>$___________</td>
<td>□ All □ Some $_________</td>
</tr>
<tr>
<td>Pensions and Annuities</td>
<td>$___________</td>
<td>$___________</td>
<td>$___________</td>
<td>□ All □ Some $_________</td>
</tr>
</tbody>
</table>

Completed documents should be uploaded directly to UI-Integrate Self-Service. For instructions on how to access and upload documents please visit [https://osfa.illinois.edu/DocumentUpload](https://osfa.illinois.edu/DocumentUpload). Be sure to include your name and UIN on all documents uploaded. After you have uploaded your documents, you may confirm receipt within 3 business days at [https://osfa.illinois.edu/process/checking-your-status](https://osfa.illinois.edu/process/checking-your-status). If you have any questions, please visit our website [www.osfa.illinois.edu](http://www.osfa.illinois.edu), contact a member of our counseling staff at (217) 333-0100 or email finaid@illinois.edu. Please do not email documents to this email address.

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