

2020-2021 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.

Individual Retirement Account (IRA) distributions and Pensions are taken from 2018 IRS Form 1040 Lines 4a and 4b. 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.

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
IRAs, pensions, and annuities	\$ _____	\$ _____	\$ _____	<input type="checkbox"/> All <input type="checkbox"/> Some \$ _____

**Please note – We may request further documentation, such as a signed 2018 1040 Federal Tax Return or 2018 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

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

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>. 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>. If you have any questions, please visit our website 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.**