



The freshman/sophomore UW campuses

Student Financial Aid

2015 STUDENT IRA AND
 PENSION/ANNUITY ROLLOVER
 (FOR THE 2017-2018 ACADEMIC YEAR)

Student Name: _____	Student ID or SSN: _____
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Student: complete the below for you (and your spouse). Do not leave blanks; write “0” if an item is zero dollars.

The untaxed portion of any IRA or pension/annuity distribution must be reported as untaxed income on the Free Application for Federal Student Aid or FAFSA ***unless it was a rollover*** into another qualified retirement plan. However if you used the IRS Data Retrieval Tool to load 2015 income information from the IRS when completing the **2017-2018 FAFSA**, it would not recognize a rollover and thus would overstate the amount of untaxed income.

To address this, review your 2015 federal tax return and complete the section below. Indicate the amount which was “rolled over” into another qualified retirement plan.

Untaxed IRA Distributions may be calculated using: IRS Form 1040 (line 15a minus 15b) or IRS Form 1040A (line 11a minus 11b)

Untaxed Pensions and Annuities may be calculated using: IRS Form 1040 (line 16a minus 16b) or IRS Form 1040A (line 12a minus 12b)

	Total from 2015 Federal Tax Return	Amount of Total that was a Rollover**
Untaxed IRA Distributions	\$	\$
Untaxed Pensions and Annuities	\$	\$

If you indicated that some funds were rolled over, **attach documentation showing the rollover: either a document from the financial institution handling the investment that reflects the reinvestment or a copy of your 1099-R.

I certify all information reported to qualify for federal student aid is complete and correct and I have attached documentation (if a rollover is being reported).

 Student Signature (handwritten, not typed)

 Date

Submit form to: UW Colleges Student Financial Aid Office
 780 Regent St, Suite 130
 Madison, WI 53715-2635