



2019-20 Untaxed IRA/Pension Rollover Form

Student _____

Student ID _____

When applying for financial aid you are required to include untaxed portions of pensions as non-taxable income, excluding rollovers. A rollover is a tax-free distribution of cash or other assets from one retirement plan that is contributed to another plan.

* For untaxed portions of Pension please refer to lines 12A (1040A) or 16A (1040) minus 12B (1040A) or 16B (1040) of your 2017 tax return.

* For untaxed portions of IRA distributions please refer to lines 11A (1040A) or 15A (1040) minus 11B (1040A) or 15B (1040) of your 2017 tax return.

Please return this form along with an **attached copy of the 2017 tax return or 1099-R form** (*rollovers do not show on IRS Transcripts*) to the Financial Aid Office *within 2 weeks*. Thank you for your cooperation and prompt response.

Your tax form does not specify if the amount was a rollover. Therefore, please assist us in using the correct information by checking one of the statements below:

_____ The IRA, pension or annuity on the 2017 tax return **WAS A ROLLOVER**.

_____ The IRA, pension or annuity on the 2017 tax return **WAS NOT A ROLLOVER**.

_____ The IRA, pension or annuity on the 2017 tax return was a rollover to a **Roth IRA**.
You/your parent(s) transferred money from a traditional IRA to a Roth IRA.

If you/your parent(s) rolled over a traditional IRA into a Roth IRA by transferring funds, the amount of the rolled over is reported as taxable income on the tax return. You can complete a Special Circumstance Form to reduce the income and taxes paid due to the rollover.

The form can be found at: <https://www.minotstateu.edu/finaid/forms.shtml>

By signing this worksheet, I (we) certify that all the information reported on this worksheet is complete and correct. If the student is a dependent, at least one parent must sign. **WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both. WET SIGNATURE REQUIRED (Electronic signatures will not be accepted.)**

Student Signature:	Date:
Parent/Spouse Signature:	Date:

Forms can be submitted in ONE of the following ways:

Mailing to: Minot State University, Financial Aid Office, 500 University Ave W, Minot, ND 58707

Drop Off on Campus: MSU Financial Aid Office, 2nd floor, Administration Building

Submitting online via our secure filedrop by visiting: [minotstateu.edu/finaid/verification.shtml](https://www.minotstateu.edu/finaid/verification.shtml)

Phone: 1-800-777-0750 or 701-858-3375 • Fax: 701-858-4310 • For additional questions, email: Amanda.Allard@minotstateu.edu