OFFICE OF FINANCIAL AID AND VETERANS AFFAIRS

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Federal School Code – 008087 · https://www.montgomery.edu/financial-aid

2026-27 Request for Pension and Annuity Rollover Review

Student:_____ID/SSN#:_____Phone_____

Email _____ Parent Name _____

Please complete this form if all or some of your or your parent(s) IRA or Pension has been rolled over (or your spouse's if you are married), and the rolled over amount is showing on your 2026-2027 FAFSA as untaxed IRS distributions or untaxed pensions.

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 when completing the FAFSA, the retrieval tool would not recognize the rollover.

IRA distributions, pensions, and annuities are taken from lines 4a and 4b of the IRS form 1040. Please review your individual tax return, indicate if all or some of the distribution was reinvested, sign, and date.

Distribution Type on Tax Return	**Total Amount**	**Taxable Amount**	**Untaxed Amount**	**Amount of Distributions Reinvested**
IRA Distributions	$_____	$_____	$_____	All ☐ Some$_____
Pensions and Annuities	$_____	$_____	$_____	All ☐ Some$_____

I certify that ALL of the information on this form is complete and correct. Student must sign and date below and if student is dependent, the parent whose information was reported on the 2026-2027 FAFSA must also sign and date.

Printed Name:_____

Signature:_____Date_____

Parent's Signature-if student is dependent_____ _____

Date:_____

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