SAINT LOUIS UNIVERSITY
STUDENT FINANCIAL SERVICES

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2021-2022 REQUEST FOR PENSION AND ANNUITY ROLLOVER REVIEW

(Independent Student)

Student's Name _____ SLU Banner ID Number _____

Generally, distribution 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. If, however, 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 or your Spouse's IRA or Pension for the 2019 tax year was a Rollover(s).

IRA, pension and annuity distributions are taken from lines 4a and 4b of IRS form 1040. Please review your individual tax return and indicate if all or some of the distribution was reinvested. Attach the documents showing the rollover, then sign and fax or mail to the number or address listed above.

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

Type of Distribution	Total Amount	Taxable Amount	Untaxed Amount	Amount of Distributions Reinvested
IRA, Pension, Annuity Distributions 1040 4a – 4b	$_____	$_____	$_____	☐ All ☐ Some

* If more space is needed, attach a separate page with your name and student ID at the top.

<u>STOP</u>: Did you fully complete this form? We will return any incomplete / unsigned forms for correction.

By signing, I certify that all of the information reported and/or attached is complete and correct. **WARNING:** If you purposely provide misleading information or withhold information, you may be subject to penalty of law and/or institutional sanctions.

STUDENT'S SIGNATURE **DATE** **SPOUSE'S SIGNATURE** **DATE**

NOTE: Signatures must be handwritten. Computer fonts not acceptable