

SAINT LOUIS UNIVERSITY™

STUDENT FINANCIAL SERVICES

One Grand Blvd.

Phone: 314-977-2350

DuBourg Hall, Room 121

Fax: 314-977-3437

Saint Louis, MO 63103

Email: SFS@SLU.edu

2017-2018 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 2015 tax year was a Rollover(s).

IRA distributions are taken from lines 15a and 15b of IRS form 1040 or lines 11a and 11b on IRS form 1040A. The pensions and annuities are taken from lines 16a and 16b on IRS form 1040 or lines 12a and 12b on IRS form 1040A. 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 Distributions 1040 15a – 15b 1040A 11a – 11b	\$ _____	\$ _____	\$ _____	<input type="checkbox"/> All <input type="checkbox"/> Some
Pensions and Annuities 1040 16a – 16b 1040A 12a – 12b	\$ _____	\$ _____	\$ _____	<input type="checkbox"/> All <input type="checkbox"/> Some

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

STOP: 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