2027/2028
Pension Rollover Verification Form - Spouse

Student Name: _____ **Student ID:** _____

We recently received your 2027/2028 FAFSA and noticed your spouse listed a large amount for "Untaxed portions of pensions" but did not indicate that these funds were a rollover. A rollover is when you receive a lump sum distribution from a pension, annuity, retirement plan, IRA, etc. and transfer it into another qualified retirement plan or IRA. The amount of this transfer, or rollover, should be reported in the 'Pension rollover into an IRA or other qualified plan' section on the FAFSA.

Complete the information below by having your spouse refer to their 2025 Federal 1040 tax return and 2025 1099-R forms:

Step 1	$	Pensions and Annuities - Line 5a of 1040 form (should equal the total of box 1 from all your 2025 1099-R forms)
Step 2	$	Pension and Annuities taxable amount - Line 5b of 1040 form
Step 3	$	Difference (***Step 1 minus Step 2***)
Step 4	$	Rollover Amount(s). If Box 7 of your 1099-R has code 6, G or H, include the amount from Box 1 of 1099-R(s) here. If you have multiple 1099-R(s) with these codes, total all 1099 amounts.
Step 5	$	Untaxed portion *not* considered a rollover (***Step 3 minus Step 4***)

If there are discrepancies between the information above and your FAFSA, we may request additional documentation from your spouse.

By signing this form, I (we) certify that all the information reported on this form is complete and correct.

Student Signature: _____ **Date:** _____

Spouse Signature: _____ **Date:** _____

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

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