



IRA, PENSION, ANNUITY ROLLOVER STATEMENT

Student's Name _____ NDId _____
Last First

Distributions from individual retirement accounts (IRA), pensions, annuities, and other similar accounts are usually reported to you on *IRS Form 1099-R*. Federal regulations state that if you receive a lump-sum distribution, you can roll over the distribution into another qualified retirement plan or IRA and retain the tax-deferred status.

Please complete this form if some or all of an IRA, pension, or annuity has been rolled over. Untaxed IRA distributions are calculated using the difference between lines 15a and 15b of *IRS Form 1040* or lines 11a and 11b of *IRS Form 1040A*. Untaxed pension/annuity distributions are calculated using the difference between lines 16a and 16b of *IRS Form 1040* or lines 12a and 12b of *IRS Form 1040A*. Please review your individual tax return, complete the information below, and send the signed and completed form to our office after attaching the *IRS Form 1099-R* and/or investment documents confirming the rollover.

Distribution Type	Total Amount	Taxable Amount	Untaxed Amount	Amount of Untaxed Portion Reinvested (Rollover)
IRA Distribution(s)	\$	\$	\$	\$
Pension/Annuity Distribution(s)	\$	\$	\$	\$

Please remember, we are unable to process this form unless an *IRS Form 1099-R* and/or other investment documents are attached to confirm the rollover.

By signing this form, I certify that all of the information reported on this form is complete and correct. **Electronic signatures are not acceptable.**

Parent 1 Signature: _____ Date: _____

Parent 2 Signature: _____ Date: _____

Please submit signed and completed form, along with supporting documentation, to the Office of Financial Aid. Contact information provided below for email (preferred method) and mail.

University of Notre Dame | Office of Financial Aid | 115 Main Building | Notre Dame, IN 46556
Email: faforms@nd.edu | Phone: (574) 631-6436 | Website: financialaid.nd.edu