



Student Financial
Services

Student Financial Services

Knight Hall, Room 174

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[SFS's Secure File Upload website](#) • [UW's website](#)

2026-2027 Student/Student's Spouse IRA, Pension, Annuity Rollover Statement

Section 1: Student Information

Student Name:		W#:	
Email Address:		Phone:	

Section 2: Overview and Instructions

A. Overview

- ☐ We have reviewed your 2026-2027 financial aid application and need confirmation of the amount either reported by you or your spouse as an IRA/Pension rollover on your FAFSA form.
- ☐ Generally distributions from pensions, annuities, profit-sharing and retirement plans, IRAs, insurance contracts, etc. are reported 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, or insurance contract, you can **roll over** the distribution into another qualified retirement plan or IRA to maintain its tax-deferred status. These **rolled-over funds** should **not** be reported on the FAFSA as untaxed income.

B. Instructions

- ☐ Listed below are the types of distributions received. Please indicate if **all**, **some**, or **none** of the distribution was reinvested, then sign and submit this form to our office.
- ☐ If some or all of the distributions were reinvested, you must attach documentation from the financial institution handling the investment **or** submit your **1099-R** form.

Types of Distribution Table

Type of Distribution	Total Amount	Taxable Amount	Untaxed Amount	Amount of Reinvested Distributions
IRA Distributions	\$	\$	\$	All ☐ Some ☐ \$ _____ None ☐
Pensions and Annuities	\$	\$	\$	All ☐ Some ☐ \$ _____ None ☐

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Section 3: Signature and Certification

Each person signing below certifies that all information reported is complete and accurate. The student, and their FAFSA contributor(s) (if applicable) whose information was reported on the FAFSA, must sign and date. Typed signatures are not accepted.

Warning: *If you purposefully give false or misleading information on this form, you may be fined, sent to prison, or both.*

Student's Signature	Date (mm/dd/yy)
Student's Spouse's Signature (if applicable)	Date (mm/dd/yy)

Please return completed form via Secure File Upload: www.uwyo.edu/sfa/forms/upload.html