



Office of Financial Aid
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2024-2025 VERIFICATION WORKSHEET

Parent IRA and Pension Rollover Worksheet

Your parent(s) indicated on the FAFSA or TASFA that they have rollover from an IRA or Pension and annuities distribution reported on their 2022 1040. Please have your parent(s) complete the following worksheet by writing their name(s) and recording the amount of IRA and Pension rollover for the 2022 tax year.

Once we have received all requested documents on your To Do List, please allow our office up to 3 weeks to review and process the documents submitted.

Student Information	
Name (Last, First, Middle Initial)	UTD ID
Parent Information	
Parent 1 Name (Last, First, Middle Initial)	Parent 2 Name (Last, First, Middle Initial)
Report the amount of rollover in your untaxed IRA distribution (1040 line 4a) below:	
Report the amount of rollover in your untaxed Pension and annuities distribution (1040 line 5a) below:	
Check the box below if you do not have rollover:	
<input type="checkbox"/> By checking this box, I, the parent(s) of the student above, attest that the answer on the FAFSA or TASFA was incorrect and that I/we do not have any amount of rollover in the untaxed IRA and/or Pension and annuities distribution.	
Signature and Certification	
Each person signing this worksheet certifies that all of the information provided above is complete and correct.	
Parent Signature _____	Date _____
Student Signature _____	Date _____
Please submit your completed worksheet with handwritten (not typed) signatures to the Financial Aid Uploader tool at: https://finaid.utdallas.edu/forms	