



Office of Financial Aid
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2024-2025 VERIFICATION WORKSHEET

Student IRA and Pension Rollover Worksheet

You indicated on the FAFSA or TASFA that you have rollover from an IRA or Pension and annuities distribution reported on your 2022 1040. Please complete the following worksheet by writing your name 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
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 student above, attest that my answer on the FAFSA or TASFA was incorrect and that I do not have any amount of rollover in my 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.
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