

2023-2024 Pension/Annuity Rollover Review Form



Office of Scholarships and Financial Assistance

800 University Drive Office: 660-562-1363
Maryville, MO 64468 Fax: 660-562-1674
finaid@nwmissouri.edu Toll Free: 800-633-1175

Student information

Last name _____ First name _____ Middle initial _____ Northwest 919 number _____
 Address _____ City _____ State _____ ZIP _____ Phone Number _____

Distributions from 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. When you used the IRS Data Retrieval Tool (DRT) when completing the 2023-2024 FAFSA, you indicated that you had a rollover for tax year 2021. Complete this form to provide the rollover information and documentation to our office.

Please complete this form if all or some of an IRA or Pension has been rolled over. Untaxed IRA distributions are calculated using the difference between lines 4a and 4b of IRS form 1040. Untaxed pension and annuity distributions are calculated using the difference between lines 4c and 4d of IRS form 1040. Please review your individual tax return, complete the table below, and send the completed form to our office **after attaching the 1099 and/or investment documents confirming the rollover.**

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

Please remember, we are unable to process this form unless a 1099 and/or other investment documents are attached to confirm the rollover.

Certification statement

By signing, I certify that all information reported is complete and accurate.

Student Signature (required) _____ Date _____ Parent Signature (required for dependent students) _____ Date _____

Warning: If you purposely give false or misleading information, you may be fined, be sentenced to jail, or both