



THE UNIVERSITY of
NEW ORLEANS

Financial Aid and Scholarships
IRA, PENSION, ANNUITY ROLLOVER STATEMENT

Student's Name: _____

W#: _____

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. 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.

Name of person with rollover: _____

Distribution Type: IRA, Pension, or Annuity Distribution	Total Amount	Taxable Amount	Untaxed Amount	Amount of Untaxed Portion Reinvested (Rollover)
	\$	\$	\$	\$

Certification and Signatures

I hereby certify that the information reported on this worksheet is complete and correct. **Warning:** If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student Signature

Date

Parent Signature (If applicable)

Date

Spouse Signature (If applicable)

Date

