

IRA/PENSION ROLLOVER FORM ACADEMIC YEAR

DIRECTIONS

As part of your 2022-2023 financial aid application, your parent indicated an amount of untaxed IRA or pension distributions received in 2020. The untaxed portion of an IRA or pension distribution must be reported as untaxed income on the FAFSA **unless** it was a rollover into another qualified retirement plan.

If this reported amount was a rollover into another qualified retirement plan, please complete all sections of this form and submit it to Enrollment Services. Be sure the form is signed by the parent whose information was reported on the 2022-2023 FAFSA.

Send Completed Form To:

University of Rhode Island
Enrollment Services Green Hall 6
Rhody Ram Way
Kingston, RI 02881 USA

Phone: (401) 874-9500

Fax: (401) 874-2002

Email: esmail@etal.uri.edu

Website: web.uri.edu/enrollment

SECTION 1. Student Information

Name (first, middle initial, last)	Birthdate (mm/dd/yyyy)	Student ID
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SECTION 2. IRA/PENSION ROLLOVER STATEMENT

Please provide a written statement confirming that the IRA/Pension Rollover dollar amount that was reported on your 2022-2023 FAFSA, was rolled over into another qualified retirement plan. Please be sure to sign and date on the line provided below.

SECTION 3. Certification

You and your parent must sign and date this certification section. By signing this form, I/we certify that all the information I/we have reported on this form to qualify for federal student aid is complete and correct.

Student signature (required)	Date signed
Parent signature (required for Dependent students)	Date signed

