

Parent Distribution Rollovers

2024-2025 (Fall 2024, Spring 2025, Summer 2025)

Name: _____
Student's Name (Last, First, M.I.)

ID: _____
Student Identification Number (SID)

This form is used to verify parent distributions from pensions, annuities, retirement or profit-sharing plans, IRAs, insurance contracts, etc. which were rolled over to another qualified account.

1. Please refer to the parent's 2022 IRS 1040 tax form:

IRA Distributions (IRS 1040 lines 4a and 4b):

IRA distributions (line 4a): _____ Taxable Amount (line 4b): _____

Rollover? ☐ Yes ☐ No

If yes, please list amount: _____

Pensions and annuities (IRS 1040 lines 5a and 5b)

Pensions and annuities (line 5a): _____ Taxable Amount (line 5b) _____

Rollover? ☐ Yes ☐ No

If yes, please list amount: _____

By signing this form, I certify that all the information provided is complete and accurate.

Parent signature

Date

Electronic and typed signatures are not acceptable.