



INDIANA UNIVERSITY  
SOUTH BEND

***IRA DISTRIBUTION ROLLOVER***  
***2024-2025 Academic Year***

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Office of Financial Aid and Scholarships ▪ Indiana University South Bend ▪ P.O. Box 7111 ▪ South Bend, IN 46634-7111  
Phone: (574)520-4357 Fax: (574) 520-5561 Email: sbfinaid@iu.edu Website: financialaid.iusb.edu

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**Print Name**

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**Student ID Number**

Qualified rollovers from one retirement account to another are not taxable and should not be counted as untaxed income on the FAFSA.

**Did your/your parent's IRA or pension distribution include a rollover?**

**Yes (submit documentation of the rollover)**

**No, I/my parent did not rollover funds from one retirement account to another. I/my parents had an untaxed IRA or pension distribution in the amount of \_\_\_\_\_**

By signing below, you agree that the information provided is accurate to the best of your knowledge.

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Student Signature

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Date

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Parent/Spouse Signature

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Date