



INDIANA UNIVERSITY
SOUTH BEND

IRA DISTRIBUTION ROLLOVER
2026-2027 Academic Year

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

Print Name

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.

Student Signature

Date

Parent/Spouse Signature

Date