
2009-2010
Untaxed IRA/Pension Form

Student's Name _____ Student's ID _____

Clarification of IRA, pension or annuity information is needed to complete the Verification of your financial aid application.

Line _____ minus _____ of your/your parent's 2008 federal tax return shows an untaxed IRA, pension or annuity of \$_____. The untaxed portion of the IRA, pension or annuity must be included as untaxed income on your financial aid application unless it was a rollover to another retirement plan. A "rollover" is a tax-free distribution of cash or other assets switched from one retirement plan to another. Your federal tax return does not specify if the amount was a rollover; therefore, please clarify this by checking one of the statements below. If you are unsure if it was a rollover, please contact your tax preparer.

- _____ The IRA, pension or annuity *WAS* a "rollover" (you did not receive the money).
- _____ The IRA, pension or annuity *WAS NOT* a "rollover" (you did receive the money).
- _____ The IRA was a rollover to a **Roth IRA**.
(Upon receipt of this form, we will mail you a Special Circumstance Form so that your Roth IRA may be excluded from your financial aid calculation).
- _____ Other – please explain what it is (i.e. life insurance, Roth IRA distribution) and if it was already taxed or not.

Comments _____

Please complete, sign and return this form to the Office of Student Financial Services **WITHIN 7 DAYS**. If you have questions as to how to complete this form, please call Mary at 701-231-8398 for assistance. Thank you for your cooperation and prompt response. Your financial aid will be on hold until all information is received and your application has been verified.

By signing this form, you are certifying that the information reported is true and accurate.

Student's Signature _____ Date ____/____/____

Parent's Signature _____ Date ____/____/____