

2024-2025 Pension/Annuity Rollover Review Form



Office of Scholarships and Financial Assistance

800 University Drive Office: 660-562-1363
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Student information

Last name First name Middle initial Northwest 919 number

Distributions from pensions, annuities, and other similar accounts are usually reported to you on IRS Form 1099-R. Federal Regulations state that if you receive a lump-sum distribution, you can roll over the distribution into another qualified retirement plan or IRA and retain the tax-deferred status.

Please complete this form if all or some of an IRA or Pension has been rolled over. Untaxed IRA distributions are calculated using the difference between lines 4a and 4b of IRS form 1040. Untaxed pension and annuity distributions are calculated using the difference between lines 5a and 5b of IRS form 1040. Please review your individual tax return, complete the table below, and send the completed form to our office with the following items:

- A copy of the Tax Return Transcript with the word “rollover” handwritten or typed next to the applicable line items; **or**
- A signed and dated copy of the 1040 tax return that was filed with the IRS with the word “rollover” handwritten or typed next to the applicable line items; **or**
- A copy of the 1099 and/or investment documents confirming the rollover.

Distribution Type	Total Amount	Taxable Amount	Untaxed Amount	Amount of Untaxed Portion Reinvested
IRA Distribution(s)	\$	\$	\$	\$
Pension/Annuity Distribution(s)	\$	\$	\$	\$

Please remember, we are unable to process this form unless applicable documents are attached to confirm the rollover.

Certification statement

By signing, I certify that all information reported is complete and accurate. I understand electronic signatures will not be accepted.

Student Signature (required) Date Parent Signature (required for dependent students) Date

Warning: If you purposely give false or misleading information, you may be fined, be sentenced to jail, or both