



Student Financial Services

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2024-25 Student's Spouse IRA/Pension Rollover Form

Section A – Student Information (Please print clearly)

STUDENT NAME:	STUDENT ID #:
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Section B – Student's Spouse IRA/Pension Rollover Information

Student's Spouse Name:

As part of your 2024-25 financial aid application, you have either reported an untaxed IRA and/or a pension distribution amount that included a rollover and was not reported when you initially completed your FAFSA, or you completed the FAFSA and reported either all or a portion of an IRA and/or pension distribution as including a rollover amount.

I certify that I had a rollover amount from an IRA distribution and/or a pension distribution in 2022.

Please submit along with this form the following documents:

A copy of your SIGNED 2022 federal income tax return AND

Copies of all your 2022 1099-R forms.

Section C – Student's Spouse Signature

By signing this worksheet, I certify the information reported is correct to the best of my knowledge. I understand corrections to the FAFSA may be submitted directly to the U.S. Department of Education and any such corrections may also warrant an adjustment to any financial aid that has already been offered for the 2024-25 academic year.

Student's Spouse Signature

Date

NOTE: Signatures cannot be typed or stamped. Must be signature.

If you have any questions, please go to uwm.edu/meetsfsc to make an appointment with a member of our Advising Staff.