



Student Financial Services

Mellencamp Hall, Room 162, P.O. Box 469, Milwaukee, WI 53201-0469
Phone: (414) 229-4541 Fax: (414) 229-5699 Email: finances@uwm.edu

2026-27 Student IRA/Pension Rollover Form

Section A – Student Information (Please print clearly)

Student Name:	Student ID #:
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Section B – Student IRA/Pension Rollover Information

As part of your 2026-27 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 2024.

Please submit along with this form the following documents:

A copy of your signed 2024 federal income tax return and

Copies of all of your 2024 1099-R forms.

Section C – Student 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 2026-27 academic year.

Student 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.