

Pensions, Annuities & IRA Rollover Form (PAIV20)

The difference between the total amount of pensions, annuities and IRA distributions received during a calendar year and the taxable portion is considered untaxed income for financial aid purposes. Transfers of funds from one account to another (rollovers) can be excluded.

To allow the Financial Aid Office to verify a rollover, please complete the certification below.

I certify that, of the total pension, annuity and/or IRA distribution, \$_____ was rolled over in 2020.

Parent's Signature: _____

Print Student's Name: _____

Student's Michigan Tech ID#: M_____

Please return the completed form by one of the following methods to:

Michigan Technological University, Student Financial Services Center
Upload through mymichigantech.mtu.edu
Fax Number: 906-487-3042
Mailing Address: 1400 Townsend Dr., Houghton, MI 49931-1295