

Pensions, Annuities & IRA Rollover Form (PAIV24)

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 following.

Total IRA Distributions Received (IRS form 1040 line 4a) \$ _____

Taxable IRA Distributions (IRS form 1040 line 4b) \$ _____

Total Pensions and Annuities Received (IRS form 1040 line 5a) \$ _____

Taxable Pensions and Annuities (IRS form 1040 line 5b) \$ _____

I certify that, of the untaxed pension, annuity and/or IRA distributions (total minus taxable), \$ _____ was rolled over in 2024.

Parent's Signature: _____

Print Student's Name: _____

Student's Michigan Tech ID#: M _____

This form can be mailed to Michigan Technological University, Financial Aid or uploaded through apps.mtu.edu/finaid