



2025-2026 Spouse IRA/Pension Rollover Verification Form

Student Name: _____ **ECC ID or SSN:** _____

Spouse's Name: _____

Your spouse indicated on your 2025-2026 FAFSA an amount of untaxed IRA or pension distributions received in 2023. The untaxed portion of an IRA or pension distribution must be reported as untaxed income on the FAFSA unless it was a rollover into another qualified retirement plan.

Please have your spouse review their 2023 federal tax return and complete the section below listing the amount of untaxed IRA or pension distributions which were rolled over into another qualified retirement plan. If the answer is none, please write zero.

Untaxed IRA or Pension Distribution = IRS Form 1040 (lines 4a + 5a) minus (lines 4b + 5b)

	Total from 2023 Federal Tax Return	Amount of Total that was a Rollover**
Untaxed IRA or Pension Distributions		

** If an amount was rolled over, please provide a copy of the 2023 IRS Form 1099-R to verify the amount that was rolled over.

I certify that all of the information on this form is complete and correct.

Spouse's Signature: _____ Date: _____

** Electronic Signatures will not be accepted*