



2025-2026 Verification of Untaxed IRA/Pension

Return to: One-Stop Student Services Memorial Union Room 302 2901 University Ave Stop 7155 Grand Forks, ND 58202-7155

Secure document upload: Verification Document Upload Form

Student Information

Form fields for Last Name, First Name, MI, Student ID, Date of Birth, Telephone Number, and E-Mail Address.

INSTRUCTIONS: On the 2025-2026 FAFSA you reported Untaxed IRA Distributions/Pensions. Please indicate whose information is being reported on this form: Student's Parent's Spouse

Clarification of IRA, pension, or annuity information is needed to complete the Verification of your financial aid application.

Your financial aid cannot be processed until this information is received.

The untaxed portion of an IRA, pension, or annuity must be included as untaxed income on your financial aid application unless it was a rollover to another retirement plan.

The IRA, pension or annuity/WAS a rollover. You/your parent(s) did not receive money and it is still in a new IRA, pension or annuity.

The IRA, pension or annuity WAS NOT a rollover. You/your parent(s) received money from an IRA, pension or annuity.

The IRA, pension or annuity was a rollover to a Roth IRA. You/your parent(s) transferred money from a traditional IRA to a Roth IRA.

Note: If you/your parent(s) rolled over a traditional IRA into a Roth IRA by transferring funds, the amount rolled over is reported as taxable income on the tax return.

By signing this worksheet, I/we certify that all of the information reported on this worksheet is complete and correct.

Signature and Date lines for Student and Parent/Spouse.