Pepperdine University, Seaver College

Office of Financial Assistance

2018-2019 IRA/Pension Rollover Information

The FAFSA submitted for the 2018-2019 academic year indicates that an IRS Rollover was reported on your/your parents' 2016 Federal Tax Return. Please confirm below the amount of the IRS Authorized rollover amount reported on the return. Please enter "N/A" for any items that do not apply.

Student Name: _____ CWID#: _____
Last First M.I.

STUDENT/SPOUSE:
Information from the student's (and spouse's if applicable) 2016 Federal Income Tax Return

1. Enter the amount from IRS Form 1040 line 15a or IRS Form 1040A line 11a (IRA distributions)……$_____
2. Enter the amount from IRS Form 1040 line 15b or IRS Form 1040A line 11b (Taxable amount)……$_____
3. Was this IRA distribution a rollover? ☐YES ☐NO
4. Enter the amount from IRS Form 1040 line 16a or IRS Form 1040A line 12a (Pensions and annuities)……..…..$_____
5. Enter the amount from IRS Form 1040 line 16b or IRS Form 1040A line 12b (Taxable amount)……$_____
6. Was this pension/annuity distribution a rollover? ☐YES ☐NO

PARENT (For Dependent Students):
Information from the 2016 Federal Income Tax Return of the parent(s) whose information was reported on the FAFSA

1. Enter the amount from IRS Form 1040 line 15a or IRS Form 1040A line 11a (IRA distributions)……$_____
2. Enter the amount from IRS Form 1040 line 15b or IRS Form 1040A line 11b (Taxable amount)……$_____
3. Was this IRA distribution a rollover? ☐YES ☐NO
4. Enter the amount from IRS Form 1040 line 16a or IRS Form 1040A line 12a (Pension/annuity distributions)….$_____
5. Enter the amount from IRS Form 1040 line 16b or IRS Form 1040A line 12b (Taxable amount)……$_____
6. Was this pension/annuity distribution a rollover? ☐YES ☐NO

CERTIFICATION AND SIGNATURE: Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

_____ _____
Student's Signature Date

_____ _____ _____
Parent Signature Parent Name (Please Print) Date

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Return to:
Pepperdine University • Seaver College • Office of Financial Assistance
24255 Pacific Coast Highway • Malibu • California • 90263-4301• Phone (310) 506-4301 • Fax (310) 506-4746