

**Pensions, Annuities & IRA Rollover Form** (PAIV23)

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 2023.**

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](https://apps.mtu.edu/finaid)**