



2020-2021 Student Pension Rollover Worksheet

OFFICE OF STUDENT FINANCIAL PLANNING

Student Name _____

Student ID _____

Date _____

We must have the information checked below to complete the processing of your 2020-2021 Financial Aid application. If additional space is needed for explanation, please use the back of this form or attach a separate sheet. **PLEASE NOTE: Financial Aid is awarded on a first come first serve basis; therefore, it is very important to send us the necessary information immediately. We cannot complete your application until this information is returned.** If you have any questions concerning this form or the financial aid process, please call our office at 515-271-2905 or toll-free at 1-800-44-DRAKE. Thank you for your cooperation!

Your 2018 Federal Tax Return indicated a pension/annuity distribution. Please indicate the amount of the distribution that was "rolled over" into another qualified pension plan. A rollover is a tax-free distribution of cash or other assets from one retirement plan that is contributed to another plan. **If the answer is NONE, please write ZERO.**

| | Amount listed on 2018 Tax Return | Rollover Amount |
|--|-------------------------------------|-----------------|
| Pensions and annuities (1040 line 4A) | \$ _____ | \$ _____ |

Signature

Student Signature _____

Date _____

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

Submit this worksheet to: finaiddocs@drake.edu or mail/fax to:
Office of Student Financial Planning • Drake University • 2507 University Ave • Des Moines, IA 50311
Toll Free: 1-800-443-7253 (Option 3) • Phone: 515-271-2905 • FAX: 515-271-4042

Please be sure to update your **mailing** address and phone number if they have changed. To do this, log into My Drake Home and on the home tab choose the MyDUSIS link and then personal information. If you would prefer to do by phone, call Registrar at [515-271-2025](tel:515-271-2025).