Financial Aid and Scholarship Services
Parent Rollover Confirmation

Student Information
Please type or print clearly using only blue or black ink.

<table>
<thead>
<tr>
<th>Last name</th>
<th>First name</th>
<th>Middle initial</th>
<th>10-digit ASU ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local street address</td>
<td>City</td>
<td>State</td>
<td>Zip code</td>
</tr>
</tbody>
</table>

This form will not be processed if any items are left blank or illegible.
If clarification of your situation is necessary, additional information or documentation may be required.

Purpose
Sometimes, a taxpayer will "roll over" funds from an existing IRA, pension or annuity plan to another qualified plan during the same tax year. These rollover amounts are not included on the FAFSA because that portion of the distribution was reinvested immediately into a recognized retirement fund.

The FUTURE Act Direct Data Exchange (FA-DDX), formerly known as the IRS Data Retrieval Tool, on the FAFSA is unable to identify rollovers. Therefore, when a parent(s) uses the FA-DDX, transfers an amount greater than zero for untaxed portions of IRA distributions or untaxed portions of pensions, and indicates a rollover, ASU must confirm the amount of the rollover. That amount is then subtracted, and the result will be used in the calculation of the student aid index (SAI).

Instructions
1. Indicate the total amount of the 2022 rollover in Section A. The amount can be located on lines 4 or 5 of your 2022 federal 1040 tax return.
2. Submit this form online by uploading to tuition.asu.edu/find-a-form/parent-rollover/2025, by mail to PO Box 870412, Tempe, AZ 85287-0412, or in person at any Financial Aid and Scholarship Services location.

Section A: Untaxed portions of IRA, pension and annuity distributions
☐ I/we (if married) did not report a rollover for the 2022 tax year.
☐ I/we reported a rollover for the 2022 tax year.

Parent 1, or if married and filed jointly for 2022, the total amount of 2022 untaxed portions or IRA, pension, and annuity distributions: $________
If married, and filed separately for 2022, Parent 2 amount of 2022 untaxed portions of IRA, pension, and annuity distributions: $_______

Section B: Parent certification and signature
Certification: I certify that the submitted information is true and correct to the best of my knowledge and belief. If asked by an authorized official, I agree to provide additional proof of the information provided on this form. I understand that purposely providing false or misleading information on this form may result in reduction or repayment of aid, fines and/or imprisonment in this and/or future years.

Parent(s) signature | Date

If you need assistance to complete this form, please contact our office at 855-278-5080 or tuition.asu.edu/contact-resources.