

**Qualified Retirement Account Rollover Form – Tax Year 2021**

Student Name _____ CSULB ID Number _____

The Internal Revenue Service (IRS) requires that qualified retirement account rollovers are reported on the tax return, whether it is a rollover or not. When using the IRS Data Retrieval Tool (DRT) to transfer information from the IRS to your FAFSA, the rollover amount is transferred as untaxed income. The rollover amount will inflate your total income, which could affect financial aid eligibility.

If the taxpayer did not roll over a retirement distribution, it is normally taxable. **Do not** use this form to request removal of taxed retirement distributions; complete the [Income Appeal Form](#) instead to request consideration of non-reoccurring one-time income removal.

Section A. Student Information

Status at CSULB: Applicant Newly Admitted Current/Returning Student

Section B. Supporting Documents Required

Distribution applies to: Student
 Spouse name
 Parent name

You must attach the following supporting documents to this form.

- Typewritten explanation include the rollover amount, signed and dated.
- Qualified Retirement Distribution Rollover
 1. Copy of 2021 IRS Form 1040 that includes the word “rollover” beside applicable item.
 - a. The tax form must be signed and dated by tax filer or tax preparer.
 2. If the word “Rollover” is not included on 1040, a copy of 2021 1099R statement showing the distribution code “G” in Box 7.

Section C. Certification and Signature

By signing this form, I/we certify that all the information reported on this form and all attachments is true, complete, and accurate.

Parent 1 Signature _____ Date _____

Parent 2 Signature _____ Date _____

Student Signature _____ Date _____

Spouse Signature (if applicable) _____ Date _____

Return this form and any attachments to our office labeled with your name and CSULB ID Number:

By Mail:

Office of Financial Aid and Scholarships
 1250 Bellflower Blvd.
 Long Beach, CA 90840-0106

In Person:

Visit our website to [“Join the Queue”](#)
 Beach Central – Intake Windows
 Brotman Hall; 1st Floor Courtyard