

# Drake University

Office of Student Financial Planning

**Reply to:**

Carnegie Hall  
2507 University Avenue  
Des Moines, IA 50311-4506  
515-271-2905  
1-800-44-DRAKE  
Fax: 515-271-4042

Date \_\_\_\_\_

Student Name \_\_\_\_\_

Student Identification # \_\_\_\_\_

## Student Pension Rollover

We must have the information checked below to complete the processing of your 2008-2009 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 2007 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.**

	<b>Amount listed on 2007 Tax Return</b>	<b>Rollover Amount</b>
<b>Pensions and annuities</b> (1040 line 16a, 1040A line 12a)	\$ _____	\$ _____

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date