



2025-2026 Rollover Confirmation Form

Please Return To:

Office of Financial Assistance Dropbox

<https://www1.villanova.edu/university/office-of-financial-assistance/contact-us/dropbox-and-important-forms.html>

Student's Name: _____ Villanova University
Student ID Number: _____

If a withdrawal from pension, annuity, or IRA reported on a tax return is a rollover, we are allowed to exclude this rollover amount from each financial aid calculation. In order to ensure an accurate calculation, please complete this form indicating the amount that was a rollover in 2023.

1. Did the student, or spouse if applicable, have a tax-exempt rollover from a pension, annuity, or IRA in 2023?
Line 4a and 5a MINUS 4b and 5b on tax return Yes No

If yes, indicate the amount of the rollover:

2. Did the parent have a tax-exempt rollover from a pension, annuity, or IRA in 2023?
Line 4a and 5a MINUS 4b and 5b on tax return Yes No

If yes, indicate the amount of the rollover:

I attest that all information on this form is accurate and correct and pertains to a rollover from the 2023 tax year.
A "Wet"/physical signature is required. We cannot accept electronic signatures.

Student's Printed Name

Student's Signature Date

Parent's Printed Name

Parent's Signature Date