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2019-2020 IRA/PENSION ROLLOVER VERIFICATION FORM

Student Name _____ **Student ID #** _____

As part of your 2019-2020 financial aid application, your parent indicated an amount of untaxed IRA or pension distributions received in 2017. The untaxed portion of an IRA or pension distribution must be reported as untaxed income on the FAFSA unless it was a rollover into another qualified retirement plan.

Use your 2017 Federal Income Taxes to complete one or both sections that apply below. Enter "0" for any items that do not apply.

For IRA distributions:

- 1. Enter the amount from IRS Form 1040 line 15a or IRS Form 1040A line 11a (IRA distributions) \$ _____
- 2. Enter the amount from IRS Form 1040 line 15b or IRS Form 1040A line 11b (Taxable amount) \$ _____
- 3. Was this IRA distribution a rollover? YES NO
- 4. If yes, what amount was a rollover into another qualified retirement plan? \$ _____

For pension/annuity distributions:

- 1. Enter the amount from IRS Form 1040 line 16a or IRS Form 1040A line 12a (pension/annuity distributions) \$ _____
- 2. Enter the amount from IRS Form 1040 line 16b or IRS Form 1040A line 12b (Taxable amount) \$ _____
- 3. Was this pension/annuity distribution a rollover? YES NO
- 4. If yes, what amount was a rollover into another qualified retirement plan? \$ _____

CERTIFICATION: One parent whose information was reported on the 2019-20 FAFSA must sign. Please note that Digital/Electronic signatures will not be accepted.

I certify that all the information reported on this form is true, complete, and accurate to the best of my knowledge. I understand that any false statements could be cause for denial, reduction, withdrawal, or repayment of federal or institutional financial aid.

Parent Signature

Date