

2017-2018 IRA/PENSION ROLLOVER VERIFICATION

Student Name: _____ Student ID: _____

INSTRUCTIONS

Please note: If you or your parents filed tax returns and used the IRS Data Retrieval Tool or submitted a Tax Return Transcript, you will need to submit this form to have any rolled over IRA distribution or untaxed pension funds excluded from your expected family contribution (EFC).

1. **This form will not be processed if any items are left blank or illegible;** write "0" for items that do not apply
2. Include birth parent's signature if it was required on the FAFSA
3. Include spouse's information if you were married when you filed the FAFSA
4. If clarification of your situation is necessary, additional information or documentation may be required

SECTION A: UNTAXED IRA DISTRIBUTION OR PENSION ROLLOVER

Acceptable supporting documentation must be attached to this form and be one of the following:

1. IRS Form 1099-R. Box 7 must show a code of "G"
2. IRS Form 5498. Box 2 shows the amount of rollover contributions
3. Account statements showing the amount was taken out of one account and rolled over into another account

YOU MUST PROVIDE SUPPORTING DOCUMENTATION SHOWING THAT THE FUNDS WERE ROLLED OVER

UNTAXED INCOME TYPE	STUDENT & SPOUSE	PARENT(S)
Amount of untaxed portions of IRA distributions from 2015 IRS form 1040 (lines 15a minus 15b) or 1040A lines (11a minus 11b) that was a Rollover	\$	\$
Amount of untaxed portions of pensions from 2015 IRS form 1040 (lines 16a minus 16b) or 1040A (lines 12a minus 12b) that was a Rollover	\$	\$

SECTION B: 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.

(Student Signature)

(Date)

(Parent Signature - If signature was required on FAFSA)

(Date)