



Please return this form to:
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2023-2024 STUDENT ROLLOVER VERIFICATION FORM

SECTION A: STUDENT INFORMATION

STUDENT NAME: _____ STUDENT ID: _____

The purpose of this worksheet is to verify the amount of any untaxed IRA distribution and/or pension distribution which was a rollover that should be excluded from your FAFSA.

Before our office can disburse any financial aid funds to your student account, we will need you to confirm that you have answered the question (referenced below) correctly.

PLEASE NOTE:

- ✓ We cannot continue processing your financial aid until all required financial aid documents have been submitted.
- ✓ All required documents must be uploaded to your Financial Aid Student Self-Service Portal.
- ✓ We will update your FAFSA, if needed, based on the information provided on this form.

SECTION B: UNTAXED IRA DISTRIBUTION OR PENSION ROLLOVER

1. ENTER THE AMOUNT FROM YOUR OR YOUR SPOUSE'S (IF 2021) 2021 IRS FEDERAL INCOME TAX RETURN. IF ANY OF THE ITEMS DO NOT APPLY TO YOUR OR YOUR SPOUSE, PLEASE WRITE \$0. DO NOT LEAVE BLANKS.

UNTAXED INCOME TYPE	STUDENT/SPOUSE
AMOUNT OF IRA DEDUCTIONS AND PAYMENTS TO SELF-EMPLOYED SEP, SIMPLE, KEOGH AND OTHER QUALIFIED PLANS FROM IRS FORM 1040 SCHEDULE 1—TOTAL OF LINE 15 AND LINE 19.	\$ <input style="width: 100px; height: 30px;" type="text"/>
AMOUNT OF UNTAXED PORTIONS OF IRA DISTRIBUTIONS AND PENSIONS FROM IRS FORM 1040—(LINE 4A PLUS 5A) MINUS (LINE 4B + 5B). EXCLUDE ROLLOVERS. IF NEGATIVE, ENTER A ZERO HERE.	\$ <input style="width: 100px; height: 30px;" type="text"/>

2. YOU MUST PROVIDE SUPPORTING DOCUMENTATION SHOWING THAT THE FUNDS WERE ROLLED OVER IN TAX YEAR 2021.

ACCEPTABLE SUPPORTING DOCUMENTATION MUST BE UPLOADED WITH THIS FORM AND BE ONE OF THE FOLLOWING:

- **IRS FORM 1099-R** BOX 7 MUST SHOW A CODE OF "G".
- **IRS FORM 5498** BOX 2 SHOWS THE AMOUNT OF ROLLOVER CONTRIBUTIONS.
- **ACCOUNT STATEMENT** SHOWING AMOUNT WAS TAKEN OUT OF ONE ACCOUNT AND ROLLED OVER INTO ANOTHER ACCOUNT.

SECTION C: CERTIFICATION

By typing my name below, which serves as my electronic signature, I certify the information on the form and any associated documents submitted are accurate and complete to the best of my knowledge and that there is no forgery. The information supplied on this form supersedes that which was provided on the FAFSA. I understand that any false statements or misrepresentation may be cause for denial, reduction, withdrawal, and/or repayment of financial aid, and I may be subject to a fine, imprisonment or both, under provisions of the United States Criminal Code.

STUDENT'S SIGNATURE: _____ DATE: _____