



Office of Student Financial Services

2020-2021 IRA/PENSION ROLLOVER VERIFICATION WORKSHEET

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. ENTER "0" FOR ANY ITEMS THAT DO NOT APPLY.

Information from the 2018 Federal Income Tax Return of the parent(s) whose information was reported on the FAFSA:

- 1. Enter the amount from IRS Form 1040 line 4a IRA, Pensions and Annuities \$ \_\_\_\_\_
- 2. Enter the amount from IRS Form 1040 line 4b IRA, Pensions and Annuities \$ \_\_\_\_\_
- 3. Was this IRA, Pension or Annuity distribution a rollover?     YES     NO

Please submit copies of your 2018 1099 R form with this document.

**CERTIFICATION: One parent whose information was reported on the 2020-21 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 financial aid.

\_\_\_\_\_

Parent Signature Parent Printed Name Date