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