



## 2019-2020 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 "o" FOR ANY ITEMS THAT DO NOT APPLY. **Please submit copies of your 2017 1099 R form with this document.**

Information from the 2017 Federal Income Tax Return of the parent(s) whose information was reported on the FAFSA:

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. Enter the amount from IRS Form 1040 line 16a or IRS Form 1040A line 12a (Pension/annuity distrib.) \$ \_\_\_\_\_
5. Enter the amount from IRS Form 1040 line 16b or IRS Form 1040A line 12b (Taxable amount) \$ \_\_\_\_\_
6. Was this pension/annuity distribution a rollover? ☐ YES ☐ NO

**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 financial aid.

\_\_\_\_\_  
Parent Signature

\_\_\_\_\_  
Parent Printed Name

\_\_\_\_\_  
Date