

2018-19 Verification of Untaxed IRA/Pension Rollover Amount(s)

You and/or your parent(s) are being asked to complete this form because portions of 2016 IRA/Pension distributions that were listed when using the IRS Data Retrieval Tool on your **2018-2019** Free Application for Federal Student Aid (FAFSA) were indicated as part of a rollover. Please verify these amount(s).

A. Student Information

Last Name: _____ First Name: _____

SSN: _____ SID: _____ Date of Birth: _____

B. On the 2018-2019 FAFSA using the IRS Retrieval Tool, untaxed 2016 IRA Distributions/Pensions were reported as a rollover.

- Please check whose information is being reported on this form:

- Student
- Parent

For: IRA Distributions – (1040 line 15a minus 15b, 1040A line 11a minus 11b) –

To calculate the amount of untaxed IRA distributions, subtract the amount in “b” from the amount in “a”.

The rollover amount is \$_____.

For: Pensions and Annuities – (1040 line 16a minus 16b, 1040A line 12a minus 12b) –

To calculate the amount of untaxed pension/annuity subtract the amount in “b” from the amount in “a”.

The rollover amount is \$_____.

C. CERTIFICATION: Each person signing this worksheet certifies that all of the information reported on it is complete and correct. If dependent, the student and one parent must sign and date this worksheet.

WARNING: If you purposely give false or misleading information on this worksheet, you may be referred to the Office of Inspector General and/or be liable to repay all aid received.

Student Signature _____ Date: _____

Parent Signature (if applicable) _____ Date: _____

Note: Signatures cannot be typed.