**Verification of 2019 Untaxed IRA/Pension Rollover**

**2021-2022 Academic Year**

**Instructions:** Students, spouses and parents of dependent students may be required to complete the Verification of 2019 Untaxed IRA/Pension Rollover form when an amount greater than $0 is transferred on the 2021-22 Free Application for Federal Student Aid (FAFSA) from the IRS Data Retrieval Tool. Complete this form if you reported income on lines 4a and 4b of IRS form 1040.

**Student Last Name__________________________________ First Name__________________________________**

SSN# ___________________________ SID# __________________________________________

☐ **Student / Spouse:**
  - Spouse Name (If applicable): ______________________________________________________
  - Enter the untaxed amount from IRS Form 1040 (line 4a minus 4b) $ ________________
  - Using the IRS Form 1099-R, what this amount a rollover? (check one)
    - Yes – All of my untaxed pension and annuity distribution was a rollover.
    - Yes – Part of my untaxed pension and annuity distribution was a rollover.
    - No – None of my untaxed pension and annuity distribution was a rollover.

☐ **Parent:**
  - Parent(s) Name (dependent students only): __________________________________________
  - Enter the untaxed amount from IRS Form 1040 (line 4a minus 4b) $ ________________
  - Using the IRS Form 1099-R, what this amount a rollover? (check one)
    - Yes – All of my untaxed pension and annuity distribution was a rollover.
    - Yes – Part of my untaxed pension and annuity distribution was a rollover.
    - No – None of my untaxed pension and annuity distribution was a rollover.

**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 the Inspector General and/or be liable to repay all aid received. **Note: Signatures cannot be typed.**

Student Signature__________________________________________________________ Date: ________________

Spouse (If Applicable) __________________________________________ Date: ________________

Parent Signature (Dependent students only) ____________________________________ Date: ________________

Office Use Only: Track Code 0G

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