

Verification of 2021 Untaxed IRA/Pension Rollover 2023-2024 Academic Year

Instructions: Students, spouses and parents of dependent students may be required to complete the Verification of 2021 Untaxed IRA/Pension Rollover form when an amount greater than \$0 is transferred on the 2023-24 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# _____ CTCLink ID _____

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): _____
- 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: _____