



## 2020-21 Verification of IRA/Untaxed Pension Rollover Documentation Form: Dependent

### STUDENT INFORMATION:

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|           |            |                   |
|-----------|------------|-------------------|
| Last Name | First Name | Student ID Number |
|-----------|------------|-------------------|

@students.wilkescc.edu

|                 |                        |
|-----------------|------------------------|
| Student's Email | Student's Phone Number |
|-----------------|------------------------|

Federal regulations state that if you receive a lump-sum distribution from a pension, annuity, profit-sharing or retirement plan, IRA, Insurance contract, etc., you can roll over the distribution into another qualified retirement plan or IRA and retain tax-deferred status. These rolled over funds should not be reported on the FAFSA as untaxed income, however if you used the IRS Data Retrieval when completing the FAFSA, the retrieval tool would not recognize the rollover.

IRA distributions, pensions and annuities are taken from line 4a minus 4b of the IRS form 1040. Please review your individual tax return and complete the information below.

- The IRA, pension or annuity **WAS** a rollover.  
You/your parent(s) did not receive money and it is still in a new IRA, pension or annuity.
- The IRA, pension or annuity **WAS NOT** a rollover.  
You/your parent(s) received money from an IRA, pension or annuity.

| Distribution Type               | Total Amount | Taxable Amount | Untaxed Amount | Amount of Untaxed portion reinvested (rollover) |
|---------------------------------|--------------|----------------|----------------|---|
| IRA Distribution(s)             | \$           | \$             | \$             | \$  |
| Pension/Annuity Distribution(s) | \$           | \$             | \$             | \$  |

### **Certification Statement**

By signing, I certify that all information reported is complete and accurate.

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|                   |      |
|-------------------|------|
| Student Signature | Date |
|-------------------|------|

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|  |      |
|--|------|
| Parent Signature (required for dependent students) | Date |
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