



2021-2022 Verification of IRA/Untaxed Pension Rollover Documentation Form: Dependent

STUDENT INFORMATION:

| | | |
|------------------------|--------------|-------------------|
| Last Name | First Name | Student ID Number |
| @students.wilkescc.edu | | |
| Email | Phone Number | |

Distributions from pensions, annuities and other similar accounts are usually reported to you on IRS form 1099-R. Federal regulations state that if you receive a lump-sum distribution, you can roll over the distribution into another qualified retirement plan or IRA and retain tax-deferred status.

Untaxed IRA distributions are calculated using the difference between lines 4a and 4b of IRS form 1040. Untaxed pension/annuity distributions are calculated using the difference between lines 4c and 4d of IRS form 1040. Please review your individual tax return and complete the information below.

- The IRA, pension 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.

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

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

Do not submit this worksheet to the Department of Education. Please complete and return this form to the WCC Financial Aid Office.