



2023-2024 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 5a and 5b 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.