



2019-2020 VERIFICATION OF ROLLOVER

Student Name: _____ Student ID#: _____

You are being asked to complete this form because you have indicated to us that a rollover retirement contribution is reported on the 2019-20 FAFSA. In order for these funds to be excluded from your expected family contribution, the Financial Aid Office will require the documents listed in Section 1 to confirm the amount of the rollover.

SECTION 1

Please remit the completed form to the Financial Aid Office with one of the following supporting documents:

- 1. IRS Form 1099-R. Box 7 must show code "G"
2. Copy of 1040 with rollover noted in line 15 or 16
3. IRS Form 5498. Box 2 shows the rollover amount
4. Any other account statement that would show the amount taken out of one account and rolled over into another
5. If you took any portion of the rollover as a distribution, please remit a copy of the 2017 IRS Tax Form 5498 and a copy of the 2017 1040 page 2 (showing line 59, "Additional tax on IRAs, other qualified retirement plans, etc.")

SECTION 2

Table with 2 columns: UNTAXED INCOME TYPE, AMOUNT. Rows include IRA distributions and pension from 2017 IRS form 1040.

SECTION 3

By signing* this form, I certify that all of the information reported on this form is complete and accurate, and that I have attached all the necessary supporting documentation indicated in Section 1. I understand that outstanding charges must be paid by the due date regardless of submission of this form. I understand that if I give false or misleading information on this worksheet that I may be fined, sentenced to jail, or both.

Student Signature: _____ Date: _____

Parent Signature: _____ Date: _____

*We are not able to accept electronic signatures.