

IRA/Pension Rollover Verification Worksheet

Name (please print): _____ Student ID: _____

Phone Number: _____ Email Address: _____

The purpose of this worksheet is to verify the amount of any untaxed IRA distribution and/or pension distribution which was a rollover. **ENTER "o" FOR ANY ITEMS THAT DO NOT APPLY.**

Information from the student's/spouse (if applicable) or parent's (if applicable) 2015 Federal Income Tax Return

1. Enter the amount from IRS Form 1040 line 15a or IRS Form 1040A line 11a (IRA distributions)
\$ _____

2. Enter the amount from IRS Form 1040 line 15b or IRS Form 1040A line 11b (Taxable amount)
\$ _____

3. Was the IRA distribution a rollover? YES NO

4. Enter the amount from IRS Form 1040 line 16a or IRS Form 1040A line 12a (Pensions and annuities)
\$ _____

5. Enter the amount from IRS Form 1040 line 16b or IRS Form 1040A line 12b (Taxable amount)
\$ _____

6. Was this pension/annuity distribution a rollover? YES NO

By signing below, both student and parent acknowledge and confirm that all of the information reported above is complete and correct. If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both. If the student is Dependent, one parent whose information was reported on the FAFSA must sign and date.

Student Signature _____

Date _____

Parent Signature _____

Date _____

Please attach any Account Statement to confirm the information submitted