

# 2022/2023

## Dependent IRA/Pension Rollover Form

Your 2023–2024 FAFSA was selected for review in a process called verification. We will compare your FAFSA with the information on this document and with any other required documents. If there are differences, we will correct your FAFSA. Review of submitted documents can take up to 15 business days.



### A. Student's Information

Last Name

First Name

7-DigitHCC ID 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 the tax-deferred status.

Complete this form if all or some of an IRA or Pension has been rolled over. Untaxed portions of IRA, Pension, and Annuity distributions (withdrawals) are calculated using lines (4a minus 4b) + (5a minus 5b) of the 1040.

Please complete sections B, C, and D, below, and send the signed form to Financial Aid Services.

### B. Rollover Information

Parent had a rollover distribution in 2021. ☐ Yes ☐ No

Student had a rollover distribution in 2021. ☐ Yes ☐ No

To assist you in calculating the rollover, use the 2021 1099-R, 2019 Wage & Income transcript, or 2021 1040 tax return.

Distribution Type	Total Amount	Taxable Amount	Untaxed Amount	Amount of Untaxed Portion Reinvested
IRA, Pension, and Annuity Distribution(s)	\$	\$	\$	\$

### C. Rollover documentation (optional)

☐ I have attached a 2021 1099-R, 2021 Wage & Income transcript or 2021 signed tax return to confirm the rollover.

### D. Certification and Signature

Each person signing below certifies that all of the information reported is complete and correct. If student is dependent, the student and one parent whose information was reported on the FAFSA must sign and date.

\_\_\_\_\_  
Student's Handwritten Signature Date

\_\_\_\_\_  
Parent's Handwritten Signature Date

**Financial Aid Services**  
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**CRI:** FACyyROD  
**ImageNow:**  
Doc type: UG Finaid Verification FA  
Doc Name: V-Verification Forms  
**Work Flow:**  
Main: FAS Document Processing  
Sub-queue: Academic Year

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