



2023-2024 Verification of IRA/Untaxed Pension Rollover

STUDENT INFORMATION:

Last Name	First Name	Student ID Number
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Parent(s) name (Please complete for parent if you are a dependent student)

Distributions from pensions, annuities and other similar accounts are usually reported to you, or your parent, on IRS form 1099-R. Federal regulations state that if you, or your parent, 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, or your parent’s, tax return and complete the information below.

- The IRA, pension, or annuity **WAS** a rollover.
You 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 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
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Parent Signature (if applicable)	Date
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