



Office of Financial Aid
2510 11th Ave.
Kearney, NE 68849-2350
Ph: 308-865-8520
Fx: 308-865-8096
finaid1@unk.edu

2018-2019 FAFSA Verification

Student – Pension and/or IRA Rollover

Student Name: _____ **Student ID:** _____

We have received your 2018-19 Free Application for Federal Student Aid (FAFSA). Your FAFSA was selected for review in a process called “Verification.” As part of this process, UNK is required by federal regulation to collect information to verify that the FAFSA is accurate. If any differences are found, we will make corrections electronically on your behalf and you will receive an updated Student Aid Report (SAR).

Confirmation of a Pension and/or IRA Rollover

The FAFSA indicates that you used the IRS Data Retrieval Tool on the FAFSA to upload tax information from the IRS. Subsequent to loading the IRS data, it was indicated on the FAFSA application that you rolled over an amount of IRA and/or pension in 2016. Because the FAFSA was selected for verification, we are required to verify the amount that was rolled over. Please submit **ONE** of the following documents with the your name and NUID written at the top:

OPTION #1: Submit a signed written statement specifying the amount that was rolled over in 2016 and include a copy of 2016 1099-R form(s) verifying these amounts.

OPTION #2: Provide documentation on an IRS “Tax Return Transcript” (Use this option only if this transcript has also been requested of you.)

- Handwrite “ROLLOVER” next to the applicable line item(s) listed on the Tax Return Transcript. The notation must be signed and dated by the tax filer and submitted to our office by mail, fax or in person.