

2023-2024 FAFSA Verification

Student – Pension and/or IRA Rollover

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

We have received your 2023-24 Free Application for Federal Student Aid (FAFSA). You are receiving this form because either your FAFSA was selected for review in a process called “Verification” or you have indicated to this office that you rolled over an Individual Retirement Account (IRA) or Pension listed on your 2021 tax return. This form will be used to confirm the amount you rolled over in order to make sure it is not counted as available income in the FAFSA results. Any corrections made based on this documentation will be reported to you by the Federal Student Aid Center on an updated Student Aid Report.

The FAFSA indicates that you used the IRS Data Retrieval Tool on the FAFSA to upload tax information from the IRS. The uploaded data included a rolled over IRA or Pension from 2021. Please complete the following statement in order to verify the amount of the transaction that was rolled over.

I, _____, completed a Pension or IRA transaction for a total of
(Student Name)

\$ _____ as appears on my 2021 federal tax return. Of this amount, an IRS authorized rollover amount of \$ _____ was moved into a different retirement account.

By signing this form I acknowledge the following: By signing this form, I certify that all of the information reported to qualify for Federal/State student aid is complete and correct. If asked by an authorized official, I agree to provide proof of the information I have given on the form. Warning: If you purposely give false or misleading information, you may be fined, sent to prison, or both.

(Student Signature)

To Submit Document:

Preferred way to submit documents is to log into MyBLUE and access ‘Document Upload’ on the Financial Aid page under Related Documents. Other methods include email, fax, mail or in person.