

2024-2025 FAFSA Verification

Independent Student – Pension and/or IRA Rollover

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

According to your FAFSA, you (or your spouse, if applicable) have indicated that you rolled over an Individual Retirement Account (IRA) or Pension listed on your 2022 tax return. The untaxed portion of an IRA or pension distribution must be reported as untaxed income on the FAFSA unless it was a rollover into another qualified retirement account.

Please list the amount of rollover in the untaxed pension or IRA distribution:

Untaxed Pension Rollover Amount: \$ _____

IRA Distribution Rollover Amount: \$ _____

By signing this form I acknowledge the following:

By signing this form, you certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked, to provide: 1) information that will verify the accuracy of your completed form, and 2) U.S. or foreign income tax forms that you filed or are required to file. You also certify that you understand that the Secretary of Education has the authority to verify information reported on your worksheet with the Internal Revenue Service and other federal agencies. Warning: If you purposely give false or misleading information, you may be fined, sent to prison, or both.

Signature is **required** of at least one parent/stepparent whose information has been reported on this form.

Signature

Date

To Submit Document:

Submit this document by logging into MyBLUE and use the 'Upload Documents' button on the Financial Aid page. You may also fax, mail, or deliver the documents in- person.