

STUDENT NAME: _____

WCC ID #: _____

The untaxed portion of an IRA, pension, or annuity distribution must be included as untaxed income on the FAFSA unless it was a rollover to another retirement account. A "rollover" is a tax-free distribution of cash or other assets transferred from one retirement plan to another.

Your 2022-2023 FAFSA shows that your parent(s) reported a rollover of an IRA, pension, or annuity for the 2020 tax year. The Financial Aid & Veterans Services office requires verification of this information. **PLEASE NOTE – Your eligibility for financial aid cannot be determined until the verification process is complete.**

INSTRUCTIONS: A parent whose information is provided on your FAFSA should complete the statement below using blue or black ink, sign, and return this form to the WCC Financial Aid & Veterans Services office. If your parent is not sure if there was a rollover, he/she should contact a tax preparer or financial advisor.

A. PARENT'S STATEMENT

- The IRA, pension, or annuity reported for the 2020 tax year **WAS** a rollover. The parent(s) of the student named above did not receive the funds and the money is still in a new IRA, pension, or annuity account.
- The IRA, pension, or annuity reported for the 2020 tax year **WAS NOT** a rollover. The parent(s) of the student named above did receive the funds from an IRA, pension, or annuity account.

B. CERTIFICATION AND SIGNATURES

By signing below, I certify that all information reported on this form is true and complete. If asked, I agree to provide additional proof of the information provided on this form.

STUDENT SIGNATURE (REQUIRED)

DATE

PARENT SIGNATURE (REQUIRED)

DATE

WARNING: If you purposely provide false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.