

**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 you 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:** Complete the statement below using blue or black ink, sign, and return this form to the WCC Financial Aid & Veterans Services office. If you are not sure if there was a rollover, contact your tax preparer or financial advisor. **\*\*If you were married on the day you signed and submitted your FAFSA, remember to include information for your spouse.**

**A. STUDENT'S STATEMENT**

- The IRA, pension, or annuity for the 2020 tax year **WAS** a rollover. The student and/or spouse did not receive the funds and the money is still in a new IRA, pension, or annuity account.
- The IRA, pension, or annuity for the 2020 tax year **WAS NOT** a rollover. The student and/or spouse 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

\_\_\_\_\_  
SPOUSE SIGNATURE (OPTIONAL)

\_\_\_\_\_  
DATE

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