

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. You indicated on the 2019-2020 FAFSA that there was a rollover of an IRA, pension, or annuity for the 2017 tax year. The Financial Aid Office requires verification of this information. PLEASE NOTE – Your eligibility for financial aid cannot be determined until the verification process has been completed.

INSTRUCTIONS: Complete the statement below in blue or black ink, sign, and return this form to the WCC Financial Aid 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, you are required to include information for your spouse.**

A. STUDENT'S STATEMENT

- The IRA, pension, or annuity for the 2017 tax year **WAS** a rollover. The student and/or spouse did not receive the money and it is still in a new IRA, pension, or annuity account.
- The IRA, pension, or annuity for the 2017 tax year **WAS NOT** a rollover. The student and/or spouse did receive the money 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.

RETURN THIS COMPLETED FORM TO:
Wayne Community College - Financial Aid Office - PO Box 8002 - Goldsboro, NC 27533-8002
FAX: 919-736-9425

Wayne Community College is accredited by the Southern Association of Colleges and Schools Commission on Colleges to award associate degrees. Contact the Commission on Colleges at 1866 Southern Lane, Decatur, Georgia 30033-4097 or call 404-679-4500 for questions about the accreditation of Wayne Community College. The Commission on Colleges may be contacted only if there is evidence that Wayne Community College is significantly non-compliant with a requirement or standard. Accreditation standards are located at: <http://www.sacscoc.org/principles.asp>. Inquiries about Wayne Community College, such as admission requirements, financial aid, educational programs, etc. should be addressed directly to Wayne Community College and not the Commission's office.