

STUDENT NAME: _____

STUDENT ID: _____

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

Your 2023-2024 FAFSA shows that you reported a rollover of an IRA, pension, or annuity for the 2021 tax year. The Financial Aid & Veterans Services office requires verification of this information. **PLEASE NOTE – Your eligibility for financial aid can be established only when 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 2021 tax year **WAS** a rollover. The student 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 2021 tax year **WAS NOT** a rollover. The student or spouse received 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 accurate 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 & Veterans Services – Wayne Learning Center
PO Box 8002 - Goldsboro, NC 27533-8002
EMAIL: wcc-finaid@waynecc.edu - FAX: 919-736-9425