



2019-20 Verification of IRA/Untaxed Pension Rollover Documentation Form: Independent

STUDENT INFORMATION:

Last Name	First Name	Student ID Number
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Phone Number	Email Address
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Distributions from pensions, annuities and other similar accounts are usually reported to you on IRS form 1099-R. Federal regulations state that if you receive a lump-sum distribution, you can roll over the distribution into another qualified retirement plan or IRA and retain tax-deferred status.

Untaxed IRA distributions are calculated using the difference between lines 15a and 15b of IRS form 1040 or lines 11a and 11b of IRS form 1040A. Untaxed pension/annuity distributions are calculated using the difference between lines 16a and 16b of IRS form 1040 or lines 12a and 12b of IRS form 1040A. Please review your individual tax return and complete the information below.

- The IRA, pension annuity **WAS** a rollover.
You did not receive money and it is still in a new IRA, pension or annuity.
- The IRA, pension or annuity **WAS NOT** a rollover.
You received money from an IRA, pension or annuity.

Distribution Type	Total Amount	Taxable Amount	Untaxed Amount	Amount of Untaxed portion reinvested (rollover)
IRA Distribution(s)	\$	\$	\$	\$
Pension/Annuity Distribution(s)	\$	\$	\$	\$

Certification Statement

By signing, I certify that all information reported is complete and accurate.

Student Signature

Date