

Please contact our office for assistance completing this form.

CF23IVUR  
INDEP Student

**Suffolk University**

• Office of Student Financial Services • 73 Tremont Street • Boston, MA 02108  
617-573-8470 • 617-720-3579 (fax)

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**2023 – 2024 Verification of Untaxed Rollover Worksheet  
Independent Student**

**Student's Name** \_\_\_\_\_ **Student ID** \_\_\_\_\_

According to information reported on your 2023-2024 FAFSA, you and/or your spouse reported untaxed income from an IRA distribution or pension from your **2021** 1040 Federal Tax Return. If the IRS Data Retrieval Tool was used, this information was automatically uploaded from the IRS when your FAFSA was filed.

**Please complete the following:**

IRS 1040 line 4a minus 4b \$ \_\_\_\_\_ Is this amount a Rollover? \_\_\_\_\_ YES \_\_\_\_\_ NO

IRS 1040 line 5a minus 5b \$ \_\_\_\_\_ Is this amount a Rollover? \_\_\_\_\_ YES \_\_\_\_\_ NO

**Student's signature** \_\_\_\_\_ **Date** \_\_\_\_\_

*(A "wet signature" is required, electronic signature will not be accepted)*

**Spouse's signature** \_\_\_\_\_ **Date** \_\_\_\_\_

*(Needed if student is married and filed a joint return. A "wet signature" is required, electronic signature will not be accepted)*