2020 – 2021 Verification of Untaxed Rollover Worksheet
Independent Student

Student’s Name ___________________________ Student ID ___________________________

According to information reported on your 2020-2021 FAFSA, you and/or your spouse reported untaxed income from an IRA distribution or pension from your 2018 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:

- 1040 line 4a minus 4b $_____________
- 1040 line 4a minus 4b rollover amount $_________ (This rollover amount should not be considered untaxed income.)

Student’s signature ____________________________________
(Student must sign, electronic signature is not acceptable.)

Spouse’s signature ____________________________________
(Needed if student is married and filed a joint return, electronic signature is not acceptable.)

Date___________________