



# 2022-2023 IRA and Pension Rollover Verification

Financial Aid Office  
444 Western Blvd  
Jacksonville, NC 28546-6816  
Fax: 910-455-2767  
Email: [finaid@coastalcarolina.edu](mailto:finaid@coastalcarolina.edu)

## A. Student Information

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ MI: \_\_\_\_\_ CCCC ID: \_\_\_\_\_

Address: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Phone #: \_\_\_\_\_

The Financial Aid Office at Coastal Carolina Community College has received the results from your 2022-2022 FAFSA and has determined that additional information is needed regarding the amount of any untaxed IRA distribution and/or pension distribution which was a rollover. ENTER "0" FOR ANY ITEMS THAT DO NOT APPLY. Information must be reported from the 2020 Federal Income Tax Return of the student/spouse/parent(s) whose information was reported on the FAFSA.

Please indicate whose information is being reported on this form (circle one): Student Spouse Parent

1. Enter the amount from IRS Form 1040-line 4a (IRA distributions) \$ \_\_\_\_\_
2. Enter the amount from IRS Form 1040-line 4b (Taxable amount) \$ \_\_\_\_\_
3. Was this IRA distribution a rollover? \_\_\_\_\_ YES \_\_\_\_\_ NO
4. Enter the amount from IRS Form 1040-line 4c (Pension/annuity) \$ \_\_\_\_\_
5. Enter the amount from IRS Form 1040-line 4d (Taxable amount) \$ \_\_\_\_\_
6. Was this pension/annuity distribution a rollover? \_\_\_\_\_ YES \_\_\_\_\_ NO

**\*If you answered yes to either question above, submit a copy of your 2020 IRS 1040 form to the Financial Aid Office. \***

## Certification and Signatures

I/We certify that all of the information reported on this worksheet is complete and correct.

_____ Student Signature	_____ Date
_____ Spouse Signature	_____ Date
_____ Parent Signature (Dependent Student Only)	_____ Date

<p><b>WARNING:</b> If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.</p>
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