



2024-2025 IRA and Pension Rollover Verification

Financial Aid Office
444 Western Blvd
Jacksonville, NC 28546-6816
Fax: 910-455-2767
Email: 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 2024-2025 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 2022 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. Enter the amount from IRS Form 1040-line 4a minus 4b (Untaxed amount) \$ _____
4. Was the IRA untaxed distribution amount entered on line 3 above a rollover? _____ YES _____ NO
5. Enter the amount from IRS Form 1040-line 5a (Pension/annuity) \$ _____
6. Enter the amount from IRS Form 1040-line 5b (Taxable amount) \$ _____
7. Enter the amount from IRS Form 1040-line 5a minus 5b (Untaxed amount) \$ _____
8. Was this pension/annuity untaxed distribution amount entered on line 7 above a rollover? _____ YES _____ NO

***If you answered yes to either question above, submit a copy of your 2022 IRS 1040 form to the Financial Aid Office. ***

Certification and Signatures

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

Student Signature _____ Date _____

Spouse Signature _____ Date _____

Parent Signature (Dependent Student Only) _____ Date _____

WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.