

2024-2025 ROLLOVER VERIFICATION

Student's Name _____ JCU ID _____

As part of your 2024-2025 FAFSA application, an IRS rollover was reported. Please use this form to confirm this income was rollover into a qualifying IRS-authorized account.

Untaxed portions of IRA distributions are reported as lines 4a minus 4b on the 2022 Federal tax return.

Untaxed portions of pensions and annuities are reported as lines 5a minus 5b on the 2022 Federal tax return.

If an untaxed portion exists, sometimes these amounts are "rolled over" into a qualified plan. A qualifying rollover occurs when that distribution is reinvested into another IRS authorized account. These are usually noted with the word 'ROLLOVER" on line (4 or 5) of the Federal tax return

Did you experience an IRS authorized rollover in the year 2022? YES NO

If YES What was the total amount of this IRS authorized rollover \$ _____

Submit a signed copy of your Federal 2022 Tax Return with ROLLOVER annotation. and next to this annotation a signature and date by the tax filer.

CERTIFICATION Must be signed by hand in ink

*By signing this certification, I confirm that I experienced a qualifying IRS-authorized rollover for the amount marked above. **WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both***

Signature of Tax Payer experiencing Rollover _____ Date _____ E-mail Address _____