UNIVERSITY OF CALIFORNIA
UC RIVERSIDE

SDIST

2017- 2018 Independent Student IRA/Pension Rollover Documentation

You are required to fill out this form to verify information provided on your 2017-2018 Free Application for Federal Student Aid. You used either the Data Retrieval Tool (DRT) embedded in the Free Application for Federal Student Aid or submitted an IRS Tax Transcript to our office. The tax records you submitted indicate that you/your spouse (if applicable) may have had a qualified IRA and/or Pension Distribution Rollover in the 2015 tax year. If this true, in order to prevent the qualified IRA and/or Pension Distribution Rollover from being treated as untaxed income, which may result in a higher Expected Family Contribution (EFC) and decrease in your financial need, you must complete this form to authorize our office to make a correction on your behalf. If a section does not pertain to you, please indicate zero or not applicable (N/A). **Do not leave any spaces blank.**

SECTION 1: STUDENT INFORMATION

Last Name _____ First Name _____ Student Identification Number _____

SECTION 2: SPOUSE INFORMATION

Spouse Last Name ***(if applicable)*** _____ Spouse First Name ***(if applicable)*** _____

SECTION 3: IRA/PENSION ROLLOVER AMOUNT AND DOCUMENTATION

You must submit one of the forms of documentation demonstrating that you/your spouse (if applicable) have a qualified IRA and/or Pension Distribution Rollover included in your/their 2015 federal income tax return with this worksheet.

Please check the appropriate box below to indicate which type of documentation you will be submitting with this worksheet:

☐ A copy of IRS Form 1099 from the organization the IRA or Pension was rolled into during tax year 2015

☐ Page 1 of your Federal 2015 IRS Income Tax Return

SECTION 4:CERTIFICATION AND SIGNATURES

If you are the student or parent(s), by signing this form you certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked, to provide further documentation that will verify the accuracy of your completed form. Also, you certify that you understand that the Department of Education has the authority to verify information reported on this form with the Internal Revenue Service and other federal agencies. If you purposely give false or misleading information, you may be fined up to $20,000, sent to prison, or both.

Student Signature _____ Date _____

Spouse Signature (if applicable) _____ Date _____

You may scan and submit your completed form by email to finaid@ucr.edu
or by *fax to (951) 827-5619*
or *drop off at the Highlander One Stop Shop*
or *mail to UC Riverside Financial Aid Office, 900 University Avenue, Riverside, CA 92521*