

2019 - 2020 Parent IRA/Pension Rollover Documentation

You are required to fill out this form to change information provided on your 2019-2020 FAFSA/Dream Application. The tax information provided on your financial aid application indicates that you/your parent(s) may have had a qualified IRA and/or Pension Distribution Rollover in the 2017 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 a 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.**

STUDENT INFORMATION

Last Name

First Name

Student Identification Number

PARENT(S) INFORMATION

Parent 1 Name

Parent 2 Name *(if applicable)*

IRA/PENSION ROLLOVER AMOUNT AND DOCUMENTATION

You must submit one of the forms of documentation demonstrating that you/your parent(s) have a qualified IRA and/or Pension Distribution Rollover included in your/their 2017 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 2017
- Page 1 of your Federal 2017 IRS Income Tax Return

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

Parent 1 Signature

Date

Parent 2 Signature (if applicable)

Date

Please scan and submit your completed form by email to fadocs@ucr.edu