



OFFICE OF FINANCIAL AID
 120 East 149th Street, Savoy Building
 RM B-115 Bronx, NY 10451
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IRA / Pension Rollover 2016-2017

Last Name: _____ First Name: _____
 Last Four Digits of SSN: _____ EMPL ID: _____

The purpose of this worksheet is to verify the amount of any untaxed IRA distribution and/or pension distribution which was a rollover in the tax year 2015. **ENTER "0" FOR ANY ITEM(S) THAT DO NOT APPLY.**

Information from the student's/spouse or parent(s)' 2015 Federal Income Tax Return

1. Enter the amount from IRS Form 1040 line 15a or IRS Form 1040A line 11a (IRA distributions)
 ➤ \$ _____
2. Enter the amount from IRS Form 1040 line 15b or IRS Form 1040A line 11b (Taxable amount)
 ➤ \$ _____
3. Was the IRA distribution a rollover? YES NO
4. Enter the amount from IRS Form 1040 line 16a or IRS Form 1040A line 12a (Pensions and annuities)
 ➤ \$ _____
5. Enter the amount from IRS Form 1040 line 16b or IRS Form 1040A line 12b (Taxable amount)
 ➤ \$ _____
6. Was this pension/annuity distribution a rollover? YES NO

IRS TAX FORMS ATTACHED: 1040 / 1040A 1099-R

Certification

By signing below, both student/spouse and/or parent(s) acknowledge and confirm that all of the information reported above is complete and correct. If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both. If the student is Dependent, at least one parent whose information was reported on the FAFSA must sign and date.

Student Signature: _____ Date: _____

Parent Signature Date: _____ Date: _____

OFFICIAL USE ONLY

IRS Data Retrieval Tool used? Yes No
 ISIR Correction Required? Yes No

If yes, a Counselor Note MUST be attached.

Staff Initials _____ Date: _____